

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**

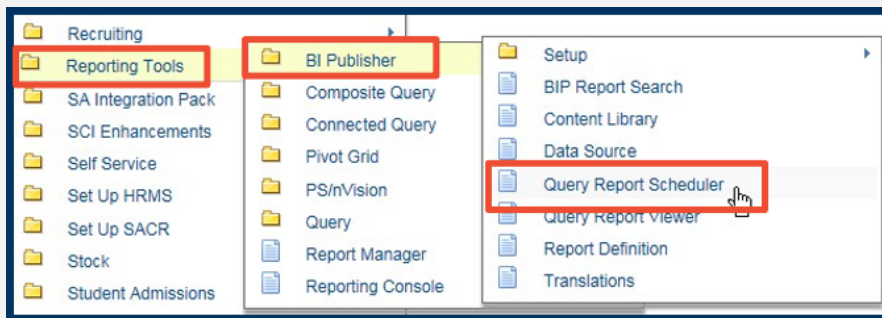
Privacy Disclosure

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: [FERPA \(Privacy Disclosure\)](#)

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).

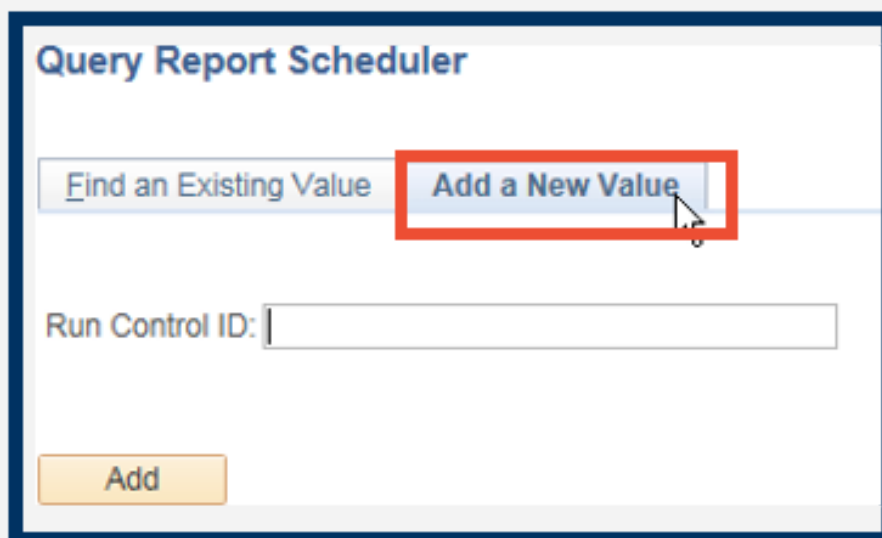
Private student information is considered Level 1 and includes, but is not limited to, academic records, information in personnel files, student conduct issues, SID, certain personal contact information, as well as other sensitive information encountered while on the job. Level 2 information, which if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

1. In Campus Solutions, navigate to **Reporting Tools > BI Publisher > Query Report Scheduler**.



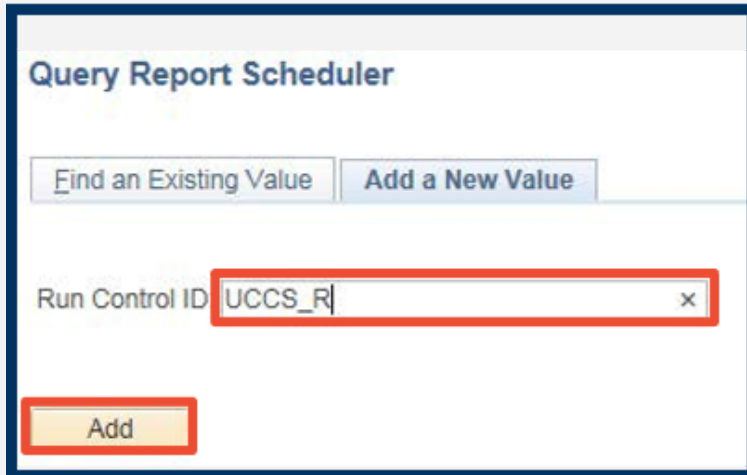
The first time you run a **BI Publisher** report using **Query Report Scheduler**, you will use the **Add a New Value** page to create a new run control. Once a Run Control has been saved, it will be available for use time and time again and can be run as is or reconfigured. Run controls are specific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

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



3. 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.

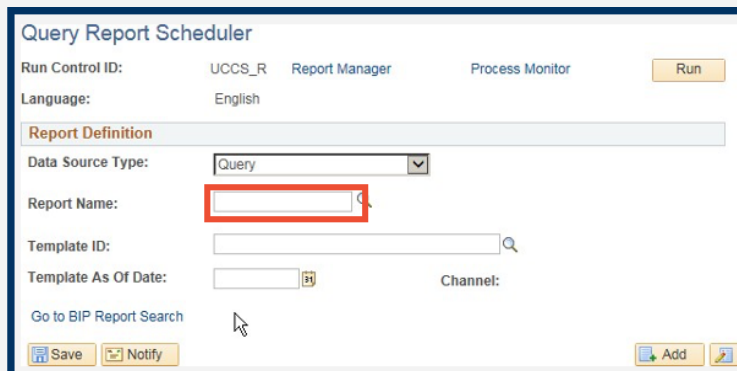
Then click **Add**

The screenshot shows the 'Query Report Scheduler' window. At the top, there are two buttons: 'Find an Existing Value' and 'Add a New Value'. Below these, the 'Run Control ID' text box contains the value 'UCCS_R'. A red rectangle highlights this text box. Below the text box, there is an 'Add' button, also highlighted with a red rectangle.

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

4. In the **Query Report**

Scheduler window, click in the **Report Name** text box, and then click the **Lookup list** magnifying glass.

The screenshot shows the 'Query Report Scheduler' window. The 'Run Control ID' is 'UCCS_R' and the 'Language' is 'English'. Below these, there is a 'Report Definition' section. The 'Data Source Type' is set to 'Query'. The 'Report Name' text box is highlighted with a red rectangle, and a magnifying glass icon is visible to its right. Below the 'Report Name' text box, there is a 'Template ID' text box and a 'Template As Of Date' text box. At the bottom, there are buttons for 'Save', 'Notify', 'Add', and a magnifying glass icon.

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.

Berkeley | Student Information Systems

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

Look Up Report Definition

*Search by: begins with

Search Results

Report Definition **1-30 of 93**

Report Name	Description	Data Source Type	Data Source ID	Data Source Owner
AD800	Studielink Posting Report	Query	SAD_SL_POST_NLD	Public
AV702	Graduates To Alumni	Query	AV702	Public
FA753	Equation Processor Report	Query	FA753	Public

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.

Favorites ▾ Main Menu ▾ > Reporting Tools ▾ > BI Publisher ▾ > Query Report Scheduler

Berkeley

Look Up Report Definition

*Search by: begins with

Search Results

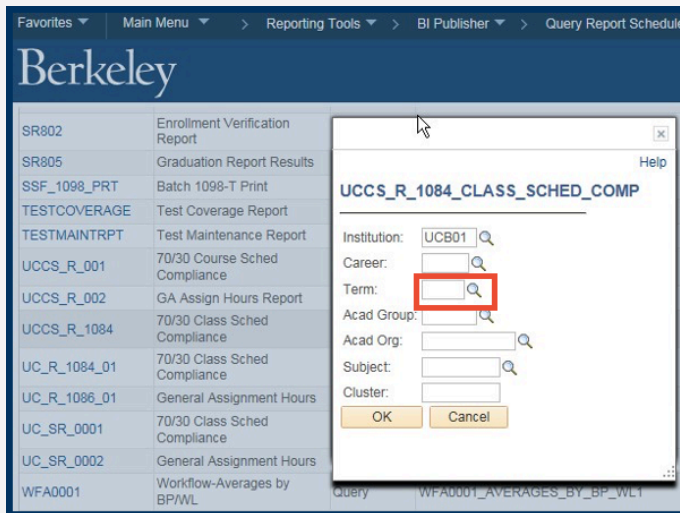
Report Definition **61-90 of 93**

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

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

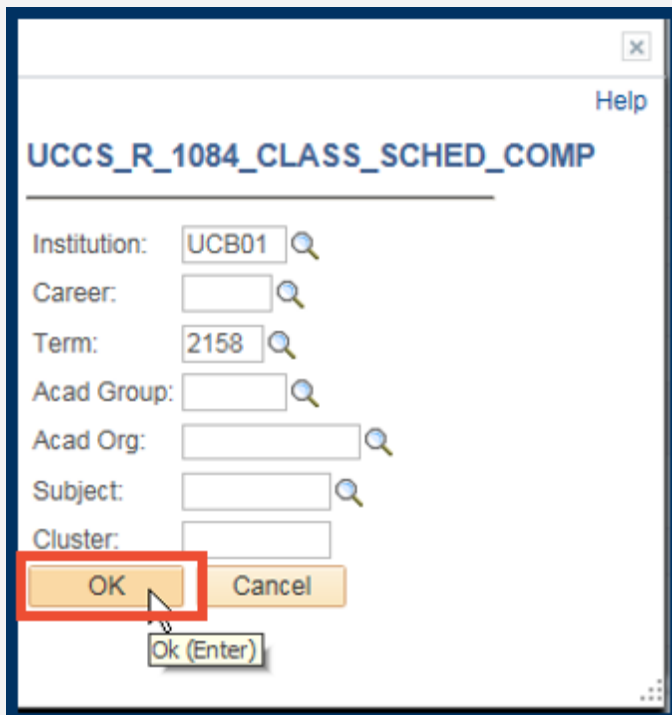
Berkeley | Student Information Systems

6. 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.

7. Click the **OK** button.



Berkeley | Student Information Systems

8. 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 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	

9. Click the **Run** button

Favorites Main Menu Reporting Tools BI Publisher Query Report Scheduler

Berkeley

Query Report Scheduler

Run Control ID: UCCS_R_1084 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

Query Parameters

Prompt Name	Prompt Value
INSTITUTION	UCB01
ACAD_CAREER	
STRM	2158
ACAD_GROUP	
ACAD_ORG	
SUBJECT	
UC_CLUSTER	

Go to BIP Report Search

Save Notify Add

Berkeley | Student Information Systems

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

Process Scheduler Request

User ID: 1058444 Run Control ID: UCCS_R_1084_TEST

Server Name: [dropdown] Run Date: 10/15/2015 [calendar icon]
 Recurrence: [dropdown] Run Time: 3:31:01PM [Reset to Current Date/Time]
 Time Zone: [dropdown]

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

OK Cancel

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

Query Report Scheduler

Run Control ID: UCCS_R_1084_TEST 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: [calendar icon] Channel:

Update Parameters

Prompt Name	Prompt Value
INSTITUTION	UCB01
ACAD_CAREER	
STRM	2158
ACAD_GROUP	
ACAD_ORG	
SUBJECT	
UC_CLUSTER	

Go to BIP Report Search

Save Notify Add

12. Click the **Process Monitor** link.

Query Report Scheduler

Run Control ID: UCCS_R_1084 **Process Monitor** Run

Language: English Go to Process Monitor

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:

Query Parameters

Prompt Name	Prompt Value
INSTITUTION	UCB01
ACAD_CAREER	
STRM	2158

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

Process List | Server List

View Process Request For

User ID: 1056444 Type: Last 1 Days Refresh

Server: Name: Instance: to: Run Status: Distribution Status: Save On Refresh

Process List

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	21007		BI Publisher	PSXPORYRPT	1056444	10/15/2015 3:31:01PM PDT	Success	Posted	Details

Go back to Query Report Scheduler

Save Notify

14. Click the **Main Menu** link.

Process List | Server List

View Process Request For

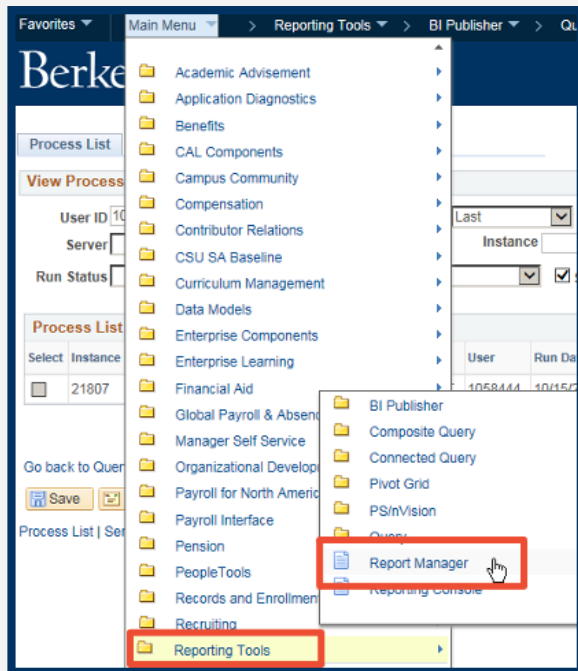
User ID: 1056444 Type: Last 1 Days Refresh

Server: Name: Instance: to: Run Status: Distribution Status: Save On Refresh

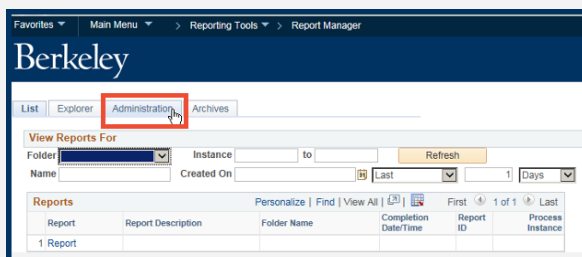
Process List

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	21007		BI Publisher	PSXPORYRPT	1056444	10/15/2015 3:31:01PM PDT	Success	Posted	Details

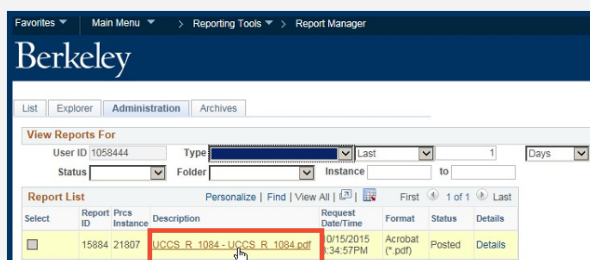
15. Navigate to: **Reporting Tools > Report Manager.**



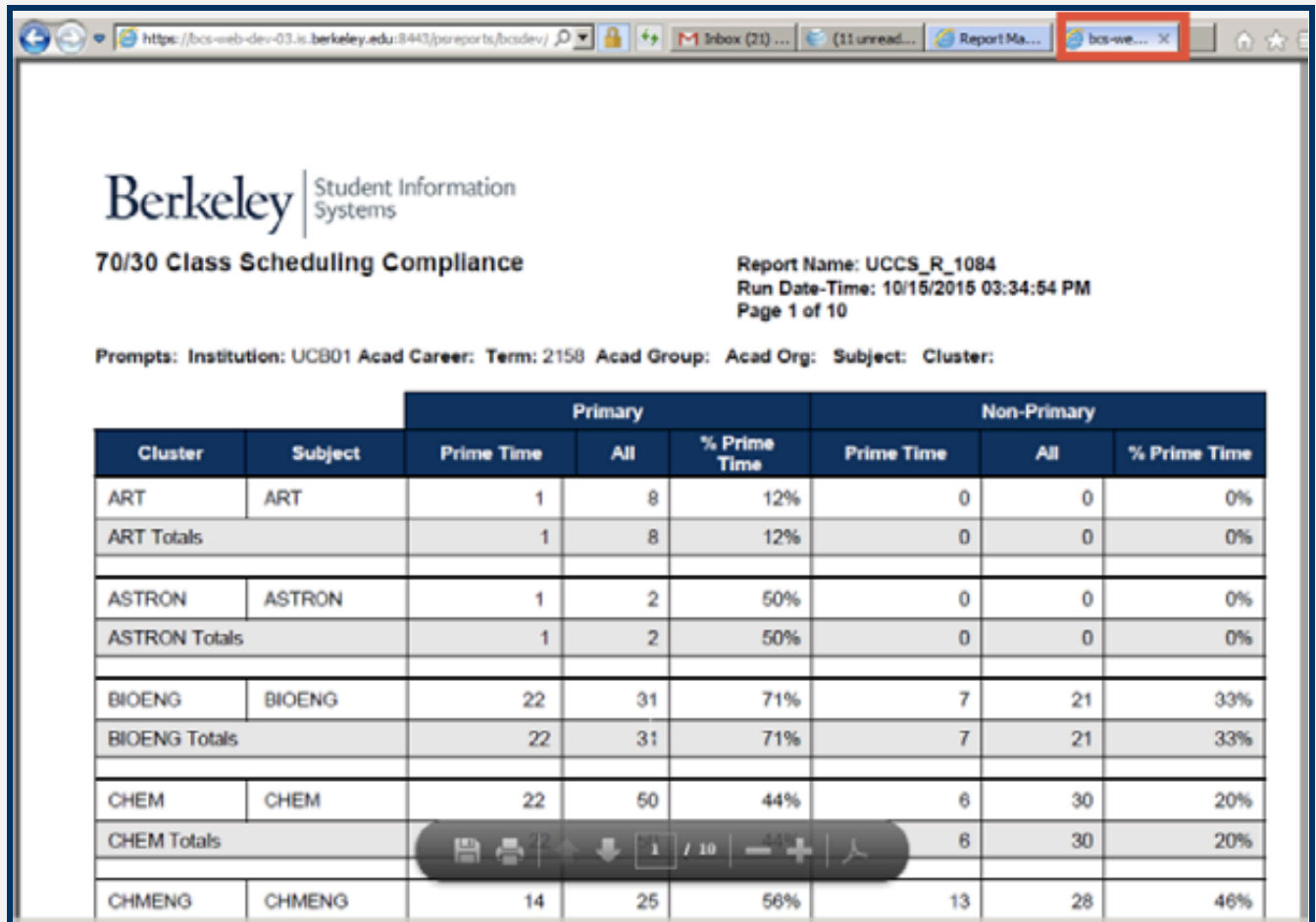
16. Click the **Administration** tab.



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



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



Berkeley | Student Information Systems

70/30 Class Scheduling Compliance

Report Name: UCCS_R_1084
Run Date-Time: 10/15/2015 03:34:54 PM
Page 1 of 10

Prompts: Institution: UCB01 Acad Career: Term: 2158 Acad Group: Acad Org: Subject: Cluster:

Cluster	Subject	Primary			Non-Primary		
		Prime Time	All	% Prime Time	Prime Time	All	% Prime Time
ART	ART	1	8	12%	0	0	0%
ART Totals		1	8	12%	0	0	0%
ASTRON	ASTRON	1	2	50%	0	0	0%
ASTRON Totals		1	2	50%	0	0	0%
BIOENG	BIOENG	22	31	71%	7	21	33%
BIOENG Totals		22	31	71%	7	21	33%
CHEM	CHEM	22	50	44%	6	30	20%
CHEM Totals		22	50	44%	6	30	20%
CHMENG	CHMENG	14	25	56%	13	28	46%

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

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



Berkeley | Student Information Systems

20. 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.

