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<tr>
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<tr>
<td>Original Version</td>
<td>7/29/2020</td>
</tr>
<tr>
<td>Added to Finance Sub System to Journal Recon the new Daily recon queries</td>
<td>10/26/2020</td>
</tr>
<tr>
<td>Updated SF GL Recon description; added Work Study FA Recon report and configuration details</td>
<td>11/13/2020</td>
</tr>
<tr>
<td>Separated SBCTC reports into new document; updated CS SF Recon to include query names; added SF CASH RECON; added Security section</td>
<td>01/06/2021</td>
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<tr>
<td>Added BI reports: FTE Summary and 3rd Party Invoice w/Student Data</td>
<td>01/07/2021</td>
</tr>
<tr>
<td>Added BI report Basic Education for Adults (BEdA) Transcript and BEdA related queries. Added Basic Skill Class related queries. Updated BCS_FTE_SUM report description. New headcount and FTE queries have also been added</td>
<td>04/30/2021</td>
</tr>
<tr>
<td>Added BI report BCS_SR_ACPL</td>
<td>06/04/2021</td>
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<tr>
<td>Added BI reports BCS_HCFNDETH and BCS_FW_CNTRT</td>
<td>06/29/2021</td>
</tr>
<tr>
<td>Notified of change in Item Type configuration making our SF to GL Reconciliation queries no longer valid – will be researched to see if can be converted to match new configuration. In mean time referencing available CS QRG that has SF to GL reconciliation</td>
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<tr>
<td>Added BI report BCS_FTECLSIN and pivot grid FTE Summary for CS. Updated pivot grids for Finance</td>
<td>07/22/2021</td>
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<tr>
<td>Added BI report BCS_SR_ACCOM</td>
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<tr>
<td>Updated to include COVID-19 Vaccinations Reporting. Also updated Links in document to Running a BI Report, Pivot Grid, and Query Schedule instead of repeating the instructions per report.</td>
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<tr>
<td>Added BI Report BHC_HR_IMMUN to the HR COVID-19 Vaccination Reporting section.</td>
<td>09/03/2021</td>
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<tr>
<td>Add pivot grid PGCS_AD_ENRL_VS_APP_RT to the Enrollment Management section. Corrected FTE query name by changing it from QCS_SR_DOC_HC_FTES to QCS_SR_DOC_FTES. Added BI Report BHC_HR_IMMUN to HR COVID reporting section.</td>
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<tr>
<td>Added BI report BFS_KK_BOOPR and BFS_KK_BOGNT</td>
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<td>Update to the Fully Vaccinated definition per CDC guidance</td>
<td>11/29/2021</td>
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<tr>
<td>Updated Security Reporting section</td>
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<tr>
<td>Added additional Security Reporting queries</td>
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<tr>
<td>Added nVision reports in Finance, including IPEDS; Additional Security Reporting</td>
<td>03/10/2022</td>
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<tr>
<td>Add BI Report that includes budget, expenses and revenue. New query to provide overview of all departments either by manager or by operating unit. Add new FTE/Headcount pivot grids.</td>
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<td>Add BI report for student enrollment verification.</td>
<td>03/21/2022</td>
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<tr>
<td>Add second version of FTE Summary pivot grid and update description of original to identify the differences between the two pivot grids. Additional Security Reporting</td>
<td>04/01/2022</td>
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<tr>
<td>Add BI Report for FS Security Opr Def and other operator Security – BFS_SEC_OPDF</td>
<td>04/15/2022</td>
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<tr>
<td>Added additional User &amp; CS SACR security queries</td>
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<tr>
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<td>Add companion query for BERGN report.</td>
<td>06/01/2022</td>
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<td>Add Purchase Order queries and report</td>
<td>06/15/2022</td>
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<tr>
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<td>06/16/2022</td>
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<tr>
<td>Added OAAP and Student Schedule BI Reports. Updated verbiage on purchase order reports/queries.</td>
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<tr>
<td>Added Data Privacy related reporting</td>
<td>07/12/2022</td>
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<tr>
<td>Add new queries for HCM affirmative action and jobcode aggregate count.</td>
<td>07/20/2022</td>
</tr>
<tr>
<td>Add new report BHC_HR_JCCNT for jobcode aggregate count showing counts for all colleges except tech colleges (250, 260, 270, 280, and 290).</td>
<td>08/02/2022</td>
</tr>
<tr>
<td>Added new security reporting and updates to existing reports noted</td>
<td>08/24/2022</td>
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**Contacts**

For questions related to ctcLink reporting and the Report Catalog, please email: dataservices@sbctc.edu
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DOCUMENT DESCRIPTION

This document was created to provide information about reporting solutions; a collection of reporting objects and tools designed to support specific and common business processes. Not all reports and queries are referenced in this document, only specific business processes that contain multiple reporting solutions that when used together provide the overall solution.

Campus Solutions

COVID-19 Vaccination Reporting

Audience: Colleges

There is a combination of delivered, custom and Data Services views used in this reporting set. We offer this data via Data Services Views for efficient college query development, queries and pivot grid reports. Immunization/Vaccination data is considered highly sensitive data requiring special handling (Category 4 data). ZD_DS_QRY_CC_VACCINE_HIGH_SENS is the Role which allows access to query Vaccine data within Campus Solutions.

Codes and Descriptions

The codes and descriptions have been configured the same in both Campus Solutions and HCM.

- CEXMD - Exemption - Medical
- CEXPH - Exemption – Philosophical (this option is not available to employees)
- CEXRL - Exemption – Religious
- CJJ1 - Johnson & Johnson / Janssen
- CMO1 - Moderna - 1st dose
- CMO2 - Moderna - 2nd dose
- COT1 - Other COVID-19 Vaccine
- CPB1 - Pfizer-BioNTech - 1st dose
- CPB2 - Pfizer-BioNTech - 2nd dose

Fully Vaccinated Flag

The SBCTC Data Services ctcLink Reporting team have created custom queries and views including a derived fully vaccinated flag. This flag represents the completion of the required vaccination series. It does not factor in nor evaluate the time between shots or since the last shot.

A value of “Yes” represents:

- The Student or Staff have received 1 Johnson & Johnson/Janssen vaccine or
- The Student or Staff have received both Moderna vaccines
or
• The Student or Staff have received both Pfizer-BioNTech vaccines
or
• The Student or Staff have received one Pfizer-BioNTech and one Moderna vaccine
or
• The Student or Staff have received 1 Other COVID-19 Vaccine

Data Services Custom Views (available to query developers)

• VCS_IMMUN_VAX_V - Institution in view is associated with student from Admission Program or Academic Program data. Uses maximum Received Date for each Immunization/Vaccine Type. Contains a fully vaccinated flag.

• VCS_IMM_VAX_DTL – Institution associated with student from Admission Program or Academic Program data. All rows returned.

• VCS_IMM_VAX_CS - All students eligible to enroll in the Term by Institution and Academic Career that are not in a discontinued or completed program status as of term start date. Contains an Enrolled Flag, Online Only Flag (Instruction Modes considered: OL, WA), Responded flag, and Fully Vaccinated flag. Eligible to enroll means that a student is Term Active in the term and the Eligible to Enroll checkbox is checked on Student Career Term.

• VCS_IMM_VAX_AGG - Count students eligible to enroll in the Term by Institution and are not in a discontinued or completed program status as of term start date by the various flags: Enrolled, Online Only (Instruction Modes considered: OL, WA), Responded, and Fully Vaccinated. - Not Highly Sensitive

*Immunization Status is not included/considered in reporting this data in CS.

Data Services Queries

• QCS_CC_COVID_FULLY_VAX_YN_FLAG - Institution is associated with student from Admission Program or Academic Program data. Contains Student Id, Name, FERPA Block, Preferred Email address, vaccination type(s) and the fully vaccinated flag.

• QCS_CC_COVID_VAX_DETAILS - Institution is associated with student from Admission Program or Academic Program data. All rows returned, no derived flags.

• QCS_CC_COVID_ENROLL_ELIG - Students eligible to enroll in the prompted Term, Institution and Academic Career (optional). Contains Student Id, Name, FERPA Block, Preferred Email address, an Enrolled Flag, Online Only Flag (Instruction Modes considered: OL, WA), Responded flag, and Fully Vaccinated flag. Eligible to enroll means that a student is Term Active in the term and the Eligible to Enroll checkbox is checked on Student Career Term and are not in a discontinued or completed program status as of term start date.

• QCS_CC_COVID_VAX_STNDT_COUNT – Count of students eligible to enroll that are not in a discontinued or completed program status as of term start date in the prompted Term and
Institution. Counts by Enrolled Flag, Online Only Flag (Instruction Modes considered: OL, WA), Responded flag, and Fully Vaccinated flag. - Not Highly Sensitive

Data Services Pivot Grid
PGCS_CC_COVID_VAX_STNDT_CNT- Student Vaccination Count
To run the pivot grid, go to Reporting Tools > Pivot Grid > Pivot Grid Viewer.
Prompt on Institution and Term and then click the “Search” button to populate the pivot grid with data
Click on the All+ hyperlink to open the grid section. Click on the total “Eligible to Enroll” value to view the grid detail.
The chart opens as a bar chart but can be changed to a pie or horizontal bar chart. Data can be filtered using the options found on the left side of the pivot grid page.

Data Services BI Publisher Report
BCS_CC_IMMUN - Student Immunization Stats
This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Student Financials GL Reconciliation Queries
Audience: Colleges

http://ctcldinkreferencecenter.ctclink.us/m/79557/l/1193961-9-2-student-financials-to-finance-gl-recon

In Finance pillar but related to SF Accounting Line from CS and FS:
QFS_GL_SF_JRNL_VERIFY_ACCOUNT
QFS_GL_SF_JRNL_VERIFY_BY_CF
These queries show the Amounts by Account (or various chart fields) from CS SF Accounting Line, FS SF Accounting Line, all other Sources that are in the Journal accounts and the total of those accounts in the Ledger.

Work Study Earnings and Financial Aid Reconciliation
Audience: Colleges
There are a set of configuration tables and corresponding queries that have been developed to compare Time and Labor payable time by Term and Pay Period with the amount of work study Financial Aid awarded by Term and Year. The Time and Labor Reporting Code that are picked up are SWS, FWS, WFS, IWS. These codes should be added by Item Type to your configuration table.
There may be situations where the tracking by a more detailed Earn code is desired, an Earnings Distribution earn code can be added to use a more distinct value; this earn code value would need to be added to the configuration table as well.

The reporting uses the TRC code from Time and Labor Payable Time first. The report then looks to see if an alternate Earn Code has been entered on the CTC_EARNS_DIST table for the EMPLID and EMPL_RCD as of the Pay End Date. If so, the Earn Code from the Earnings Distribution table is used for the reporting instead of the TRC from Time and Labor. NOTE: The TRC/Earn Codes by Item Type must be setup in the configuration tables in order to be selected in the report.

The configuration tables required are located at:
Set Up SACR > Product Related > Financial Aid > CTC Custom > State Work Study Report

These queries must be run through Schedule Query.
QCS_FA_WORKSTUDY_PAY_PERIOD
QCS_FA_WORKSTUDY_TERM

**Third Party Invoice Including Student and Course Data**

**Audience: Colleges**

This BI Report creates a third-party invoice combining student and course data.

**Security**

Highly sensitive data element National ID is included in this report. Staff who need to run this invoice will need the highly sensitive SSN role.

- ZD_DS_QRY_FA_SSN_HIGHSENS

**BI Report**

Report Name: BCS_3PST_IVC – 3rd Party Invoice w/Stdnt Data

This report can be run from Reporting Tools > BI Publisher > Query Report Viewer.

**SF Student Statement (Single Student or Batch)**

**Audience: Colleges**

This BI Report creates an SF Student Statement. One student or a batch of students may be included in the prompts and then the PDF report can be printed.

**BI Report**

Report Name: BCS_SF_STMNT – SF Student Statement

This report can be run from Reporting Tools > BI Publisher > Query Report Viewer.
Faculty Workload (FWL) Contract Print Report

**Audience: Colleges**

This BI Report creates a batch report of FWL Contracts. One faculty member or a batch of faculty members may be included in the prompts to produce one or more PDF contracts to print.

**Additional Security**

In addition to the query roles listed under BI Report, the running of this report is restricted. Only employees with the following role will be able to see and run the report.

- ZD_DS_BIP_FWL_CONTRACT

Approval for this role should come from the HR ctcLink pillar lead. Once the approval has been given, the college ctcLink Security Admin will be able to assign the role to the user.

**BI Report**

Report Name: BCS_FW_CNTRT – FWL Contract Report

This report must be run from Reporting Tools > BI Publisher > [Query Report Scheduler](#).

Online Admissions Application Portal Report (OAAP)

**Audience: Colleges**

Use this document as a reference for how to identify applications submitted through the Online Admissions Application Portal (OAAP).

**BI Report**

Report Name: BCS_AD_OAAP – OAAP Application Report

This report must be run from Reporting Tools > BI Publisher > [Query Report Scheduler](#).

See documentation in ctcLink Reference Center.

[https://ctclinkreferencecenter.ctclink.us/m/79544/l/1379930-9-2-oaap-application-report](https://ctclinkreferencecenter.ctclink.us/m/79544/l/1379930-9-2-oaap-application-report)

Student Schedule Batch Printing

**Audience: Colleges**

This BI Report creates a batch report for student schedules. Students are selected when prompted either by an Advisor ID or by a Student Group. This report is a modified version of STDNT_SCHED.

**BI Report**

Report Name: BCS_STDNTSCH – Stdnt Schedule Batch Printing

This report must be run from Reporting Tools > BI Publisher > [Query Report Scheduler](#).
Campus Solutions - Enrollment Management

Program Headcount and FTE Queries

**Audience: Colleges**

The following queries have been developed and are available to assist Campus Solutions staff with monitoring specific program enrollments and FTES such as Worker Retraining or Apprenticeship.

The number of records returned by the query represent the student headcount.

The headcount and FTES returned by the queries represent the data that will be added to the SBCTC Data Warehouse at the end of each term.

For more information related to program specific coding, please refer to the [SBCTC Coding Manual](#).

Details about the query can be found in [metaLink](#) when performing a search by query name in the Free Text Search box.

<table>
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<tr>
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<td>Apprenticeship Students HC</td>
<td>QCS_SR_APPRENTICESHIP_STDNTS</td>
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<td>Apprenticeship FTES (W91)</td>
<td>QCS_SR_APR_WAIVER_FTE</td>
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<td>Ability to Benefit</td>
<td>QCS_SR_SATB_HC_FTE</td>
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<td>Basic Food Employment and Training (BFET)</td>
<td>QCS_SR_SBFT_HC_FTE</td>
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<td>IBEST</td>
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<td>Childcare</td>
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<td>Early Achievers Grant</td>
<td>QCS_SR_SEAG_HC_FTE</td>
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<td>Hospital Employee Education and Training (HEET)</td>
<td>QCS_SR_SHEE_HC_FTE</td>
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<td>Contract High School</td>
<td>QCS_SR_SHS_HC_FTE</td>
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<tr>
<td>International Contract</td>
<td>QCS_SR_SINC_HC_FTE</td>
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<tr>
<td>International Students</td>
<td>QCS_SR_SINT_HC_FTE</td>
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<tr>
<td>Mathematic Engineering Science Achievement (MESA)</td>
<td>QCS_SR_SMSA_HC_FTE</td>
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<tr>
<td>Running Start</td>
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<tr>
<td>WorkFirst</td>
<td>QCS_SR_SWRF_HC_FTE</td>
</tr>
<tr>
<td>Worker Retraining</td>
<td>QCS_SR_SWRT_HC_FTE</td>
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<tr>
<td>Matriculated Baccalaureate</td>
<td>QCS_SR_MATRICULATEDBA_HC_FTE</td>
</tr>
<tr>
<td>BedA Basic Skills</td>
<td>QCS_SR_BASICSKILLS_HC_FTE</td>
</tr>
<tr>
<td>Department of Corrections</td>
<td>QCS_SR_DOC_FTES</td>
</tr>
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</table>

**BI Report**

Report Name: BCS_FTE_SUM – FTE Summary Tmplt by Stdnt Grp
- ctcLink Term Headcount & FTE Summary Report w/ Student Groups. The first two sections of this report show total FTEs by funding source and headcount by funding source for each term that was included in the prompt. These sections are followed by headcount and FTE totals by student group by term.
- The prompts for this report are:
  - Institution
  - Start Term Range
  - End Term Range

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

### Basic Skills Grading Basis

**Audience: Colleges**

Basic Skills courses and classes are considered Ungraded per the State Board Policy Chapter 5.30.15.

**Query**

Two queries are available in ctcLink to identify basic skills courses and their associated Grading Basis to assist in data cleanup.

- QCS_CM_BASICSKILLS_GRADEBASIS
  - Provides a list of all active Basic Skills (CIP 32*) Courses in the catalog with their associated Grading Basis. All Basic Skills courses should be associated to the BGB Grading Basis.

- QCS_CM_BSK_SCHED_GRADEBASIS
  - Provides a list of all active and currently scheduled Basic Skills (CIP 32*) Classes with their associated Grading Basis. All Basic Skills classes should be associated to the BGB Grading Basis.

### Basic Education for Adults (BEdA)

**Audience: Colleges**

Anyone who is 16 years of age or older and not enrolled in secondary school, and who either has needs below the level of high school completion or is limited-English-proficiencies eligible to participate in Basic Education for Adults (BEdA) activities.

**Query**

Repeat Course Checking

Students cannot be reported for a course in which they have already earned credit except when such a repeat is necessary to satisfy a requirement for improving academic or skill progress (grades). In no circumstance will a student be reported more than three times for the same course – this is defined as two repeats in addition to the original enrollment.

- QCS_SR_BEDA_REPEAT_COURSES
  - The use of the BEdA Grading Basis (BGB) will exclude basic skills courses from ctcLink Repeat Class Checking. A query has been developed to assist with
identifying students who have registered for a class they have already taken twice previously.

- QCS_SR_BASICSkillS_HC_FTE
  - BEdA Basic Skills Headcount and FTE

**BI Report**

Report Name: BCS_SR_BEDAT – BEdA Transcript Report

This BI Report creates a transcript of BEdA classes for one student and includes all terms that are less than or equal to the term identified in the prompt.

This report must be run from Reporting Tools > BI Publisher > [Query Report Scheduler](#).

---

**Academic Credit for Prior Learning (ACPL)**

**Audience: Colleges**

Students can earn various different types of Academic Credit for Prior Learning (ACPL) before enrolling at a Washington community or technical college, including credit for course challenges, credit by testing (CLEP, etc.), extra-institutional learning (ACE, NCLEX-RN, Military MOS, etc.), and prior experiential learning (portfolio review, etc.). The Washington Student Achievement Council (WSAC) requests that four terms of ACPL data be reported for the prior academic year with a leading summer term (e.g., Academic Year 2020 = Summer 2019, Fall 2019, Winter 2020, and Spring 2020), and WSAC requests this data in the fall following the prior academic year.

**BI Report**

Report Name: BCS_SR_ACPL – WSAC ACPL

This BI Report is modeled after the ACPL data collection form that WSAC sends out every fall requesting data from colleges for the prior academic year. There are sections in the report containing data for the four individual terms in the prompted academic year (with a leading summer term), and there are sections in the report containing summary data for that academic year. Please note that counts in the report may not exactly match what was reported to WSAC because additional ACPL data may have been loaded into ctcLink since ACPL data were compiled and reported to WSAC.

This report must be run from Reporting Tools > BI Publisher > [Query Report Scheduler](#).

---

**Aggregate Student Accommodations**

**Audience: Colleges**

Enrolled students can request accommodations for a variety of diagnoses. These diagnoses are coded in ctcLink under the following overarching categories: Deaf/Hearing, Mobility, Speech/Language, Learning Disability, Blind/Visual, Chronic/Acute Health, Neurological/Nervous System, and Psychological/Emotional. Within each overarching category are a variety of subcategories of diagnoses, and students can request accommodations for more than one diagnosis at a time. This report was developed so that colleges will have both duplicated and unduplicated counts of their enrolled students who requested accommodations under the various diagnosis codes in a given academic year with a leading summer term (e.g., Academic Year 2020 = Summer 2019, Fall 2019, Winter 2020, and Spring 2020), in a given term in that academic year, and in a given fund source (i.e., state, contract, or self-support).
BI Report

Report Name: BCS_SR_ACCOM – Aggregate Stdnt Accommodations

This BI Report is modeled after the aggregate Students with Disabilities by Category report that is available in the data warehouse by academic year, term, and funding source. There are sections in the report containing data for the four individual terms in the prompted academic year (with a leading summer term), and there are sections in the report containing summary data for that academic year. Please note that this report represents counts of students as of the date that this report is generated in ctcLink; therefore, these counts may not necessarily match the counts in the Students with Disabilities by Category report in the data warehouse (which is snapshotted at the end of the term) because diagnosis codes are not effective dated in ctcLink. Also, students are only able to be reported in up to two diagnosis categories in the data warehouse, whereas in ctcLink, students can be reported in more than two. For example, in the duplicated sections of the BI report, a student who requested accommodations for the categories Deaf/Hearing, Mobility, and Speech/Language would be counted in all three of those categories.

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Headcount by Fund Source, Ethnicity, Sex, and Enrollment Status

Audience: Colleges

This report was inspired by the QARS SR1101 report. It provides student headcount for the prompted term. The report includes unduplicated headcounts and duplicated headcounts for fund source, ethnicity, sex, and enrollment status.

BI Report

Report Name: BCS_HCFNDETH – SR1101 Hdcnt by Fnd Src & Ethn

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

FTE by Funding Source and Class Intent

Audience: Colleges

This report was inspired by the QARS SR3101 report. It provides FTES count by funding source and class intent for the prompted term. The report includes a pie chart for each funding source and then a group of pie charts funding sources for each class intent.

Note that Class intent Academic, Workforce and Personal Enrichment is determined by the SINT class attribute value. Workforce includes class attribute values Workforce and Workforce Supplemental. Class Intent Basic Skills is determined by CIP Code 32%. Class Intent Development is determined by CIP Code 33%.

Note that Class Type includes the following: Upper Division are course catalog numbers between 300 and 499. Lower Division are course catalog numbers between 100 and 299.
BI Report

Report Name: BCS_FTECLSIN – FTE by Fund Src & Class Intent
This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

State Support Funded FTE and Headcount Pivot Grids

Audience: Colleges
These reports are pivot grids which compare the registration day count for one term with the same term from previous years based on data available in ctcLink. There are running total and individual day total reports for State Support Funded FTE and Headcount.

Pivot Grid

Report Name: PGCS_SR_STD_FTE_BY_DAY – FTE Total by Registration Day
Report Name: PGCS_SR_STD_FTE_SUMMARY – FTE Sum Undup Run Total
   Student FTE Summary with running total for FTE State Supported Funding. Only days with enrollment activity are included. Days with no enrollment activity are shown with no FTE.
Report Name: PGCS_SR_STD_FTE_SUMMARY2 – FTE Sum Run ALL Days
   Student FTE Summary with running total for FTE State Supported Funding. If a day has no registration activity, that day will be populated with prior day’s total. This pivot grid takes a while to populate as the day counts are being re-summed in the background every time the grid is run.
Report Name: PGCS_SR_STD_HEADCNT_BY_DAY – Headcount Total by Reg Day
Report Name: PGCS_SR_STD_HEADCNT_SUMMARY – Unduplicated Headcount Summary
To run the pivot grid, go to Reporting Tools > Pivot Grid > Pivot Grid Viewer.

Enrollment/Admittance Rate Pivot Grid

Audience: Colleges
This report is a pivot grid which compares the number of enrolled students with the number of admitted students to derive a yield rate percentage.

Pivot Grid

Report Name: PGCS_AD_ENRL_VS_APP_RT – Apply/Admit/Enroll by STRM
To run the pivot grid, go to Reporting Tools > Pivot Grid > Pivot Grid Viewer.

Enrollment Verification

Audience: Colleges
This report is a modified version of the delivered Enrollment Verification Report. If a student withdraws from courses but is still shown as enrolled the UNITS will be set to “0.00” and the Status will be set to “No Units”
Report Name: BCS_ENRLVRFY – Stdnt Enrollment Verification

This report must be run from Reporting Tools > BI Publisher > [Query Report Scheduler](#).
Finance

Year End Close and SMARTER Queries

Audience: Colleges

There are a set of summary level reports, each with an accompanying drill down to detail report. This feature is only available when the query is run to HTML. The detail report will open in a new window, so it is important to have pop-up blocker turned off. These reports have been developed and are available to assist Finance staff with monitoring specific accounting rules and correcting during year end close processes.

Details on the reporting are on the SBCTC’s Accounting website under ctcLink Accounting, SMARTER Query Instructions.

These queries are located in the query folder called SMARTER. The list of included queries can be found in Query Viewer or Query Manager when searching by folder through either the Basic or the Advanced Search. The list can also be found in metaLink when performing a search by folder.

Sub System to Journal Reconciliation Queries

Audiences: Colleges

These queries provide the balances by Business Unit, Fiscal Year, Period or Journal Date, and Account from the sub-systems (accounting line level) that feed the Journal (limited to periods 1-12) to allow comparisons between them. Adjustment periods are not included.

These queries will show balances for all Accounts by Sub-System and Journal.

- QFS_GL_SUB_SYS_RECON – Prompted by Accounting Period
- QFS_GL_SUB_SYS_RECON_DAILY – Prompted by Journal Date

These queries will show only Accounts that do not balance between the sub system and the Journal:

- QFS_GL_SUB_SYS_RECON_DIFF – Prompted by Accounting Period
- QFS_GL_SUB_SYS_RECON_DAILYDIFF – Prompted by Journal Date

They both drill into the details of Journal ID and also drill into the detail from sub-system tables and include 1-2 key fields depending on sub system (there are Key field mapping descriptions in the query output). The drill feature is only available when the query is run to HTML. The drill reports will open in a new window, so it is important to have pop-up blocker turned off. Due to the number of tables and complexity of reporting this data, we recommend the queries be run from Schedule Query instead of Query Viewer.

More information and details on Sub System Source Tables and Key Field mapping can be found in metaLink when performing a search by query name in the Free Text Search box.

Additionally, in the Finance pillar but related to SF Accounting Line from CS and FS:

- QFS_GL_SF_JRNL_VERIFY_ACCOUNT
QFS_GL_SF_JRNL_VERIFY_BY_CF

These queries show the Amounts by Account (or various chart fields) from CS SF Accounting Line, FS SF Accounting Line, all other Sources that are in the Journal accounts and the total of those accounts in the Ledger.

Budget Reports

Audience: Colleges and State Board

The following reports use the Commitment Control ledgers or the General Ledger or a combination of both. Please be sure to review the notes about the reports so you know which ledgers are being used.

There are two sets of reports. One is for operational budget and the other is for grant budgets. Budget, expenses, encumbrance and pre-encumbrance amounts are displayed. Available budget is calculated and displayed.

BI Reports

These reports can be Reporting Tools > BI Publisher > Query Report Viewer.

- BFS_KK_B2AOP – Budget to Actual for Operational Departments. Uses commitment control ledgers.
- BFS_KK_B2AGN – Budget to Actual for Grant Departments (this report is at the project and activity id level). Budget comes from Project related tables; other data comes from commitment control ledgers.
- BFS_KK_GRANT - KK Grant w/Contract Bud & Exp (this report is very similar to BFS_KK_B2AGN but goes to another level of detail by including the project, activity id and contract breakdown). Budget comes from Project related tables; other data comes from commitment control ledgers.

These reports must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

- BFS_KK_BOOPR – KK Budget Overview for Operational Departments. Uses commitment control ledgers.
- BFS_KK_BOGNT - KK Budget Overview for Project/Grant Departments. Uses commitment control ledgers
- BFS_GL_BEROP - GL Budget, Expense and Revenue for Operational Departments. Budget, Encumbrance and Pre-Encumbrance data comes from Commitment Control ledgers. Expense and Revenue data comes from General Ledger journal tables. See companion query QFS_GL_BUD_EXP_REV_OPR below.
- BFS_GL_BERGN - Project Budget, GL Expense and GL Revenue for Grant/Project Departments. Budget data comes from PROJ_Resource table. Expense and Revenue data comes from General Ledger journal tables. Encumbrance and Pre-Encumbrance come from Commitment Control ledgers. See companion query QFS_GL_BUD_EXP_REV_PRJ below.

• BFS_GL_FINST

**Pivot Grid Reports**

These reports can be run from Reporting Tools > Pivot Grid > Pivot Grid Viewer.

- PGFS_KK_BUD2ACT_GNT_PG – Budget to Actual for Grant Departments
- PGFS_KK_BUD2ACT_OPR – Budget to Actuals for Operational Departments
- PGFS_KK_BUDGET_OVERVIEW – Commitment Control detail for Operational Departments
- PGFS_KK_BUDGET_OVERVIEW_GNT – Commitment Control detail for Grant Departments

**Queries**

- QFS_KK_BUDGET_OVERVIEW_OPR – Summary for Operational Departments. Uses commitment control ledgers.
- QFS_KK_BUDGET_OVERVIEW_OPR_DTL – Transaction Detail for Operational Departments. Uses commitment control ledgers.
- QFS_KK_BUDGET_OVERVIEW_GNT – Summary for Grant Departments. Budget comes from Project related tables, other data comes from commitment control ledgers.
- QFS_KK_BUDGET_OVERVIEW_GNT_DTL – Transaction Detail for Grant Departments. Budget comes from Project related tables, other data comes from commitment control ledgers.
- QFS_GL_BUD_EXP_REV_OPR – This is a companion query to BFS_GL_BEROP BI Report. It combines data from Commitment Control and General Ledger to provide department summary level budget, expense and revenue dollar amounts. Drill down detailed data is available for both expenses and revenue by clicking on the blue hyperlinks in the query results.
- QFS_GL_BUD_EXP_REV_PRJ – This is a companion query to BFS_GL_BERGN BI Report. It combines data from PROJ_RESOURCE, Commitment Control and General Ledger to provide department summary level budget, expense, and revenue dollar amounts. Drill down detailed data is available for both expenses and revenue by clicking on the blue hyperlinks in the query results. This query will take a few minutes to run so please run it from Schedule Query and set the format to XLS so that the drill down hyperlinks will be available.

**Finance IPEDS Reports**

**Audience: Colleges**

There are nVision reports by Fiscal Year beginning in FY2020 that provide the IPEDS Financial Reports Part A - Part C1. These reports are secure to specific users at the local Finance College office. Data downloads to an Excel spreadsheet that mirrors the Finance IPEDS report for that reporting section. The rows expand and collapse to show Chart field details to the Account, Fund, and Class, while the column expands to include the Operating Unit.

Detailed instructions for running the nVision reports can be found on the [SBCTC’s Accounting and Business Services](#) webpage under the “Accounting” section.
Lori Carambot, System Accounting and Reporting Manager, is the contact person and administrator of these reports.

The report names example for IPEDS Part A Fiscal Year 2021: A_FY21

Reports are run from Reporting Tools > nVision > Define Report Request

### Finance Financial Statement Reports

**Audience: Colleges**

There are nVision reports by Fiscal Year beginning in FY2020 that provide Financial Statements reports for Statement of Net Position and Statement of Revenue and Expense Changes in Net Position. These reports are secure to specific users in the local Finance College office. Data downloads to an Excel spreadsheet. The rows expand and collapse to show Chart field details to the Account and Fund, while the column expands to show data by Accounting Period. These reports are then used to complete the financial statement workbook supplied by the State Board for use in completing auditable GASB compliant financial statements.

Details on the reporting running these reports are on the SBCTC’s Accounting website under ctcLink the Accounting section, while information specific to financial statements is under the Financial Statement section.

Lori Carambot, System Accounting and Reporting Manager, is the contact person and administrator of these reports.

The report names incorporate Fiscal Year; examples for 2021:

- NETPOS21
- SRECNP21

Reports are run from Reporting Tools > nVision > Define Report Request

### Finance Purchase Order Queries and Reports

**Audience: Colleges**

Queries and reports for purchase order and requisition information.

**Queries**

- QFS_PO_PO_LINE_DETAIL - Purchase Order Line Detail
  - Purchase Order Line Detail. Includes encumbrance data along with PO header and PO line distrib info.
- QFS_PO_PO_VCHR_INV_PAY_DETAIL - PO, Voucher, Invoice and Pymnt
  - This query brings together PO, Voucher, Invoice and Payment data. Acts as a payment cross reference for the purchase orders. Created to be used with BI
Report BFS_PO_PYMNT.

- QFS_PO_REQ_WIP_NO_PO - Requisition in Process - No PO
  o This query returns process status information for Requisitions that are not in a "Complete" or "Canceled" status. Prompts for BU (required), Acctg Date From (optional), and Acctg Date To (optional).

- QFS_PO_REQ_NOT_SOURCED_TO_PO - Apprvd Reqs not sourced to PO
  o This query is to be used by a Purchasing Assistant or other Purchasing Office staff member to identify Requisitions that have been fully Approved and have not been sourced to a Purchase Order in any way (i.e. neither partially nor fully sourced). Prompted by Business Unit and Between Approval Date range

BI Report

This report must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

- BFS_PO_PYMNT - PO and Voucher Payment Report
  o Purchase Order and payment data combined in BI report. One PO per page with corresponding payment data. Includes Voucher, invoice, amounts paid and remaining balance. Use query QFS_PO_PO_VCHR_INV_PAY_DETAIL as a cross reference for the payments.
Human Capital Management

Affirmative Action Reporting

Audience: Colleges

This is an affirmative action report available in ctcLink Production through BI Publisher. The report is based on the legacy report CR6312 which reports ethnicity by male or female by job category.

The ctcLink BI Publisher report does the same but also includes the sex category of not specifically male or female. An additional difference is the ctcLink report is as of November 1st to better align with IPEDS reporting. The report will produce one page of results for a specific institution and another page with ctcLink system members combined results.

The report is called BHC_HR_EEO and must be run from Reporting Tools > BI Publisher > Query Report Scheduler.

Queries

- QHC_HR_AFFIRM_ACTION_EEO - Affirmative Action w/cur date
  - This query differs from the report in that it will only produce results for a specific institution and the “As of Date” is based on the current date.
COVID-19 Vaccination Reporting

**Audience: Colleges**
There is a combination of delivered, custom and Data Services views used in this reporting set. We offer this data via Data Services Views for efficient college query development, queries and pivot grid reports. Immunization/Vaccination data is considered highly sensitive data requiring special handling (Category 4 data). ZD_DS_QRY_HRCORE_VACC_HISENS is the Role which allows access to query Vaccine data within Campus Solutions.

**Codes and Descriptions**
The codes and descriptions have been configured the same in both Campus Solutions and HCM.

- CEXMD - Exemption - Medical
- CEXPH - Exemption – Philosophical (this option is not available to employees)
- CEXRL - Exemption – Religious
- CJJ1 - Johnson & Johnson / Janssen
- CMO1 - Moderna - 1st dose
- CMO2 - Moderna - 2nd dose
- COT1 - Other COVID-19 Vaccine
- CPB1 - Pfizer-BioNTech - 1st dose
- CPB2 - Pfizer-BioNTech - 2nd dose

**Fully Vaccinated Flag**
The SBCTC Data Services ctcLink Reporting team have created custom queries and views including a derived fully vaccinated flag. This flag represents the completion of the required vaccination series. It does not factor in nor evaluate the time between shots or since the last shot.

A value of “Yes” represents:

- The Student or Staff have received 1 Johnson & Johnson/Janssen vaccine
  or
- The Student or Staff have received both Moderna vaccines
  or
- The Student or Staff have received both Pfizer-BioNTech vaccines
  or
- The Student or Staff have received one Pfizer-BioNTech and one Moderna vaccine
  or
- The Student or Staff have received 1 Other COVID-19 Vaccine

**Data Services Custom Views** (available to query developers)

- VHC_IMMUN_VAX_V – Company is associated with Job record. Uses maximum Received Date for each Immunization/Vaccine Type. Contains a fully vaccinated flag and Verified by HR flag.
• VHC_IMM_VAX_DTL – Company is associated with Job record. All rows returned.

• VHC_IMM_VAX_HR – All active employees as of the current date by Company. Contains Short Work Break Flag, Responded flag, Fully Vaccinated flag and Verified by HR flag.

• VHC_IMM_VX_HRSU – All active employees as of the current date by Company. Contains Short Work Break Flag, Responded flag, Fully Vaccinated flag and Verified by HR flag. Includes Supervisor.

• VHC_IMM_VAX_AGG – Count active employees in Company by the various flags: Short Work Break, Responded, Fully Vaccinated and Verified by HR. - Not Highly Sensitive

Immunization Status is used by HR Admins to indicate the employee vaccine data has been verified. **Immunization Status = Complete Records Received indicates Verified by HR.**

SBCTC advises colleges to not keep copies of vaccination documents. There is not and will not be functionality in ctcLink (or Legacy) to retain this documentation.

**Data Services Queries**

- QHC_HR_COVID_FULLY_VAX_YN_FLAG - For HR Admin. Uses maximum Received Date for each Immunization/Vaccine Type. Contains Company, Employee ID, Name, Preferred Email Address, Fully Vaccinated flag and HR Verified Flag.
- QHC_HR_COVID_VAX_DETAILS – For HR Admin. All rows returned.
- QHC_HR_COVID_VAX_ACTIVE_EMPL – For HR Admin. Active Employees by Company with Short Work Break, Responded, Fully Vaccinated flag and HR Verified Flag. Contains Company, Employee ID, Name, Preferred Email Address.
- QHC_HR_COVID_VAX_ACT_EMPL_SUPR – For HR Admin. Active Employees by Company with Short Work Break, Responded, Fully Vaccinated flag and HR Verified Flag. Contains Company, Employee ID, Name, Preferred Email Address, List of Immunizations and Supervisor name.
- QHC_HR_COVID_VAX_EE_COUNT – Active Employee Counts in Company by Short Work Break, Responded, Fully Vaccinated and HR Verified Flags – Not Highly Sensitive

- QHC_HR_COVID_SU_FULLVAX_YN_FLG – Secure by Supervisor version
- QHC_HR_COVID_SUP_VAX_DETAILS – Secure by Supervisor version
- QHC_HR_COVID_SUP_ACTIVE_EE – Secure by Supervisor version

**Data Services Pivot Grid**

PGHC_HR_COVID_VAX_EE_CNT- Employee Vaccination Count

To run the pivot grid, go to Reporting Tools > Pivot Grid > Pivot Grid Viewer.

Prompt on Company and then click the “Search” button to populate the pivot grid with data. Click on the All+ hyperlink to open the grid section. Click on the total “Eligible to Enroll” value to view the grid detail.

The chart opens as a bar chart but can be changed to a pie or horizontal bar chart. Data can be filtered using the options found on the left side of the pivot grid page.
Data Services BI Publisher Report

BHC_HR_IMMUN - Employee Vaccination Count

This report contains aggregate data for vaccination reporting including exemptions. Data is in 2 sections. The first section contains employee counts and percentages. The second section has division level counts and percentages. Note that the division section will include duplicate counts for those employees who work under more than one department.

This report can be run from Reporting Tools > BI Publisher > Query Report Viewer.

Payroll CR-7000 Series Reporting

Audience: Colleges

This is a collection of BI Publisher Reports that provide summarized information regarding the expense distribution of Payroll as of the most recent pay end date. Reports run to Word output.

These reports can be run from Reporting Tools > BI Publisher > Query Report Viewer.

Default to RTF (Word) is the output type for this reporting but can be modified at run time.

BHC_PY_7010C – College Totals by Fund

BHC_PY_7010S – System Totals by Fund
Payroll Register Report

Audience: Colleges

A BI Report for the OFM regulatory report required to certify each payroll.

Error! Hyperlink reference not valid.

25.20.30 Certification Requirements

RCW 41.06.270 specifies two conditions an agency must meet before paying an employee. The agency head (or authorized designee) must certify that the payroll meets these conditions using the following language: “I hereby certify that to the best of my knowledge amounts listed in this payroll are true and correct charges and that employees holding a position covered by Chapter 41.06 RCW or other applicable employment contract, have been employed in accordance with the rules, regulations, and orders issued thereunder.”

Report BHC_PY_1320 must be run from Reporting Tools > BI Publisher > Query Report Scheduler.
Earned Hours Based Benefit Eligibility Queries

Audience: College HR and SBCTC HR Staff

The following queries can be run to identify employees who have a specific number of earned hours and are therefore eligible for certain benefits.

QHC_HR_THRSH_CIVILSERVICE_1050
- Report for Civil Service Exemption.
  - Civil Service Exempt - WAC 357-04-045
  - Any employee who has worked 1050 hours or less in a rolling 12-month period is exempt from civil service.
    - The user will prompt on institution.
      - Selection criteria:
        - Employee class is not equal to STU.
        - The earnings end date is between the calculated service date and the current date.
    - The earnings for this time period will be added together.
      - If the amount is 900 hours or greater they will be included in this report.
      - The 900-hour amount is used as the starting point for inclusion in the report so that the user will know when employees are getting close to the 1050 hours.
  - The drilldown includes all the detailed data used to determine that the employee has at least 900 hours of earnings and is eligible for the Civil Service Exemption.

QHC_HR_THRSH_MEDICAL_480
- Report for Medical Benefit Eligibility.
  - Medical Benefit Edibility - WAC 182-12-114
  - Any employee with 480 plus hours in a rolling 6-month period.
    - The user will prompt on institution and the earnings end date that they want to use to start the 6-month period.
      - Selection criteria:
        - The employee is part time.
        - The employee class is not equal to STU.
        - The earnings end dates included are between the earnings end date prompt and that same earnings end date minus 6 months.
        - Include all hours with HRY earn code.
    - Hours are summed and any employee with 480 hours or more in the 6-month period will be included in the query results.
  - The drilldown includes all the detailed data used to determine that the employee has at least 480 hours of earnings in a rolling 6-month period and is eligible for Medical Benefits.

QHC_HR_THRSH_RETIREMENT_70
- Report for Retirement Eligibility.
  - The user will prompt on institution.
    - Selection criteria:
• The employee must have worked 70 hours or more for at least 5 months in a year for 2 years.
• The drilldown includes all the detailed data used to determine that the employee has at least 70 hours of earnings for 5 months a year during a 2-year period.

QHC_HR_THRSH_UNIONELIG_350
• Report for Union Eligibility.
  o Union - WAC 357-04-045
• Employee is in union code WP or WF and works 350 or more hours in 12 months is eligible to join the union.
  o The user will prompt on institution.
    ▪ Selection criteria:
      • The month of the employee’s original hire date must match the month of the current date or the original hire date is within the last 12 months
      • The earnings end date is within the last 12 months.
  o All hours are summed and anyone with hours equal to or greater than 300 will be included so that the employee will be included in the report as they are getting close to 350 hours.
• The drilldown includes all the detailed data used to determine that the employee has at least 300 hours of earnings for the last 12 months.

Payroll by Department

Audience: College HR and SBCTC HR Staff
This is an HCM query providing payroll by department information for every employee paid through a specific department. This query uses highly sensitive record HR_ACCTG_LINE so those without access to the highly sensitive garnishment role will not be able to view this data.

• QHC_PY_PAYROLL_BY_DEPT

Data Privacy Acknowledgement

Audience: Colleges and SBCTC
This is an HCM query that provides a list of active employees and their data privacy acknowledgement status. Includes the Employee email, Supervisor Name and Email.

• QHC_HR_EE_DATA_PRIV_EMAIL_SUPR
Jobcode Aggregate Count

**Audience: Colleges and SBCTC**
This is an HCM query that provides an aggregate count of active employees by their jobcode.

- QHC_HR_JOBCODE_EMPL_COUNT - Active Empl Count by Jobcode

**Audience: Colleges and SBCTC**
This is a BI Publisher Reports that provide an aggregate count of jobcode by company for all institutions except technical which includes 250, 260, 270, 280, and 290.

This report can be run from Reporting Tools > BI Publisher > Query Report Viewer.
Report name: BHC_HR_JCCCNT - Active JOBCODE Count by Company
# Security

## Query Security Reporting

**Audience:** College Security Administrators

<table>
<thead>
<tr>
<th>XX</th>
<th>Description</th>
</tr>
</thead>
</table>
| XX | XX =  
CS - Campus  
FS - Finance  
HC - Human Resources |
| QUERY NAME | DESCRIPTION |
| QXX_DS_QUERY_RECORD_RPT | This query is intended to be used to troubleshoot query access issues. This query prompts for the Query Name and will identify each record in the query and flag whether or not is in the new query tree and roles. The expectation is that all records return 1=Yes. There is also a column that shows Additional Record Security to help identify SACR security related records in the CS pillar requiring additional User Student Administration Security assignments. |
| QXX_DS_QUERY_RECORD_USER_RPT | This query is intended to be used to troubleshoot query access issues by Users. This query prompts for the Query Name and Username and will identify each record in the query and flag whether or not the User has access to each record and which Role(s) provides access. |
| QXX_DS_QUERY_TREE_REC_USER_RPT | Displays the query trees developed for distribution by college security and the records associated with each Role/Permission list that may be assigned. User must also have the ZD_DS_QUERY_VIEWER role assigned. Includes UserID. |
| QXX_DS_QUERY_TREE_RECORD_RPT | Displays the query trees developed for distribution by college security and the records associated with each Role/Permission list. |
| QXX_DS_QUERY_ACCESS_BY_USER | Displays the queries that a user has access to. |
| QXX_DS_QUERY_ACCESS_BY_ROLE | Displays the queries that a specific role has access to on a standalone basis. |
| QXX_DS_QUERY_USED_BY_BIP | Displays the Connected Query or Query related to a BI Report Definition |
# User Security Reporting

**Audience:** College Security Administrators

<table>
<thead>
<tr>
<th>XX =</th>
<th>QUERY NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS - Campus&lt;br&gt;FS - Finance&lt;br&gt;HC - Human Resources</td>
<td>QXX_SEC_USER_ROLES_BY_UNIT</td>
<td>Provides a list of active Users with Job Company, JobCode Department, including Supervisor, with access by Role and Business Unit.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SEC_USER_ROLES_BY_UNT_SACR</td>
<td>Same as QCS_SEC_USER_ROLES_BY_UNIT but also has a Y/N Flag for SACR Institution</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SEC_USER_ROLES_UNIT_SA_OPR</td>
<td>Same as QCS_SEC_USER_ROLES_BY_UNT_SACR but also has the user OPRCLASS</td>
</tr>
<tr>
<td>All Pillars</td>
<td>QXX_SEC_COMPARE_USER_ROLES</td>
<td>Allows for a College security administrator to review roles assigned between two active employees at their institution.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SEC_INSTR_ADV_BY_COLLEGE</td>
<td>Provides a list of faculty and advisors configured on the Instructor/Advisor table and if Advisor/Faculty self-service roles. Also lists any user that has the self-service role and are NOT on the Instructor/Advisor table. Includes flags for roles assigned in the Portal as well.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SEC_INSTR_ADV_NO_JOB</td>
<td>Provides a list of faculty and advisors configured on the Instructor/Advisor table, displays Advisor/Faculty self-service roles, if assigned, who do not have Jobs at the prompted institution. Displays Classes Scheduled where Term End Date is not less than the Current Date. Displays the max Effective Date from HR, if applicable. Includes flags for roles assigned in the Portal as well.</td>
</tr>
<tr>
<td>CS &amp; HC Pillars Only</td>
<td>QXX_SEC_JOB_USEREMAIL_NOT_CAMP</td>
<td>Identifies employees (including faculty) that do not have a CAMP email type.</td>
</tr>
<tr>
<td>CS &amp; HC Pillars Only</td>
<td>QXX_SEC_OPR_DESC_NE_DISP_NAME</td>
<td>Identifies employees that have a mismatch between PERSONAL_DATA Name Display and the PSOPRDEFN User Profile Name. This can be minor differences, upper/lowercase or can be due to Name Change.</td>
</tr>
<tr>
<td>Pillar</td>
<td>Query Code</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>HC Pillar Only</td>
<td>QHC_SECJOB_USEREMAIL_NOT_EDU</td>
<td>Identifies any user id that does not have a .edu email address on the user profile. Please use this query as part of Security audits and update personal email addresses on the user profile. Personal email addresses should be cleaned up (removed) and updated to be the campus email address as it can cause issues with notifications, and other functionality such as TAM/Careers.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SECOPR_ROLES_SACR_NOJOB</td>
<td>Identifies users with SACR at the Parent Level and there is no matching Job record as of the query run date for the user. Source tables used to create a Parent Institution value: SetID: PS_SEC_SETID_OPR Academic Org PS_SCRTY_TBL_ACAD Advising Note PS_SAA_NOTE_ACCESS Business Unit PS_SEC_UNITSF_OPR Institution Set PS_SEC_ISET_OPR Company PS_SEC_COMPANY_OPR</td>
</tr>
<tr>
<td>HC &amp; FS Pillars</td>
<td>QXX_SECOPR_ROLES_NOJOB</td>
<td>Identifies users with a Primary Permission List that do not have a matching company Job record as of the query run date for the user.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SECUSER_ROLES_STUDENT</td>
<td>Identifies students that have enrollment and their Roles. Includes Portal Roles as well.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SECSTUDENT_DYN_ROLE_MISS</td>
<td>Identifies students Term Active in the prompted term or greater that do not have the ZZ SS Student role and other required CS roles or the Portal Role counterparts as well.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SECSTU_EMPSS_ROLE_MISS</td>
<td>Displays current/future students that have active Jobs based on run date and do not have the ZZ SS Student role. Shows Portal ZZ SS Student role if assigned.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SECUSER_STDT_LOGIN_HIST</td>
<td>Displays by student, term and institution with the ZZ SS Student and are Enrolled in the prompted term and their login history.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SECUSER_STDTLOGIN_STATUS</td>
<td>Displays by term and institution all enrolled students with the ZZ SS Student and their last login data.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SECUSER_STDT_NOLOGIN</td>
<td>Displays students that have the ZZ SS Student and are Enrolled in the prompted term (or greater) and have not</td>
</tr>
<tr>
<td>Only</td>
<td>CS Pillar Only</td>
<td>All Pillars</td>
</tr>
<tr>
<td>------</td>
<td>--------------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>QCS_SEC_SF_SS_INST_SET_MISSING</td>
<td>QXX_SEC_USER_LOGIN_HIST_UNIT</td>
</tr>
<tr>
<td></td>
<td>Displays Students where the Institution Set or the Institution Set Override does not match the prompted enrolled Institution.</td>
<td>Displays active employees by Unit, Employee and their login history to that specific pillar. Contains email address like %.EDU in HCM and FIN but not in the CS version because it can be updated directly and not match the HR official data that is stored in HCM.</td>
</tr>
<tr>
<td></td>
<td>This is located at: Nav Bar &gt; Navigator &gt; Set Up SARC &gt; Security &gt; Student Financials &gt; User ID &gt; Student Institution Set</td>
<td>This is located at: Nav Bar &gt; Navigator &gt; Set Up SARC &gt; Security &gt; Student Financials &gt; User ID &gt; Student Institution Set</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HC Pillar Only</td>
<td>QHC_SEC_PORTAL_RESET_QUESTION</td>
<td>Displays users by Company that have access to reset the Portal security question for end users. Role in Portal is: CTC_SEC_ANSWER_RESET</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>HC Pillar Only</td>
<td>QHC_SEC_PORTAL_ROLES_UNIT</td>
<td>Displays Portal Roles by User by Company by Job history association.</td>
</tr>
<tr>
<td>HC Pillar Only</td>
<td>QHC_SEC_PORTAL_ROLES_UNIT_TILE</td>
<td>Displays Company from HR and corresponding Unit Portal Tile from both roles ‘CTC_%<em>DISTR’ or ‘CTC</em>%_CC’ if assigned, else will be blank</td>
</tr>
<tr>
<td>HC Pillar Only</td>
<td>QHC_SEC_PORTAL_ROLE_MISSING</td>
<td>Displays Company from HR and corresponding Unit Portal Tile from both roles ‘CTC_%<em>DISTR’ or ‘CTC</em>%<em>CC’ if CTC</em>%_DISTR is not assigned to the HR User. Sorted so Active HR Status are shown first in query results.</td>
</tr>
<tr>
<td>CS Pillar Only</td>
<td>QCS_SEC_ACADPROG_NO_PORTALROLE</td>
<td>Needs to be run from Schedule Query. Returns any student with ZZ SS Student role and in ACAD_PROG record for an Institution and does not have a corresponding CTC_%_CC Portal Role in either Portal or CS Pillars for that Institution.</td>
</tr>
<tr>
<td>HC &amp; FS Pillars</td>
<td>QXX_SEC_OPRCLASS_NOT_ASSIGNED</td>
<td>Displays users that do not have an OprClass (Primary Permission list) assigned that matches their active Job Business Unit GL/Company or are missing OPRCLASS or missing EMPLID from PSOPRDEFN profile.</td>
</tr>
<tr>
<td>FS Pillar Only</td>
<td>QFS_SEC_USER_EMAIL_RTE_CNTRL</td>
<td>Query by User id to find email address and roles with route controls. Joins to HR Active employee row to return data where HR Business Unit maps to the FS GL Business Unit.</td>
</tr>
<tr>
<td>All Pillars</td>
<td>QXX_SEC_USER_ROLES_NOT_LOCAL</td>
<td>Roles assigned to active users by Unit that are not in the Local Role Grant authority.</td>
</tr>
</tbody>
</table>
| All Pillars    | QXX_SEC_ROLE_EDIT_BY_OPR      | Security changes by operator from the AUDIT_ROLEUSER table (does not store dynamic role assignments or roles assigned prior to implementation of auditing or converted/script assigned roles) performed by an Operator for users. Query lookup is secure, and the results return LSA OPRID data that matches the query viewer user institution/company access. Will display user at other institution if updated by LSA at your
<table>
<thead>
<tr>
<th>Institution</th>
<th>QXX_SEC_USER_ROLE_HISTORY</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Pillars</td>
<td>Security changes performed by User from the AUDIT_ROLEUSER table (does not store dynamic role assignments or roles assigned prior to implementation of auditing or converted/script assigned roles). Query lookup is secure, and the results return user data that matches the query viewer user institution/company access. Will display LSA at other institution if User updated by them.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Institution</th>
<th>QHC_SEC_DATA_PRIVACY_USAGE_VW</th>
</tr>
</thead>
<tbody>
<tr>
<td>HC Pillar Only</td>
<td>All active employees by Company that have been presented the data privacy acknowledgement and their response status. Optional prompt for EMPLID.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Institution</th>
<th>QXX_SEC_ROLE_GRANT_DEFN_PILLAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>HC &amp; CS Pillars</td>
<td>Provides a matrix style report to assist in identifying roles that sync between HCM and FIN, CS and Portal and in CS synced to Portal. If ZZ Local Security Admin role has role grant access, this is also shown in the matrix by rolename.</td>
</tr>
</tbody>
</table>
# CS SACR Security Reporting

**Audience:** College Security Administrators

<table>
<thead>
<tr>
<th>CS Pillar Only</th>
<th>QUERY NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI Publisher Report to Excel</td>
<td>BCS_SEC_SACR</td>
<td>Used by Colleges for Off Boarding an employee to capture the SACR assigned for a user. Includes SACR, SF Security, Advising Note Category Security, User Operator Defaults, lists Job Information (if applicable), and all Roles Assigned to User in CS. Must be run from Reporting Tools &gt; BI Publisher &gt; <a href="#">Query Report Scheduler</a></td>
</tr>
</tbody>
</table>

| QCS_SEC_SACR_CORE_COMPARE | | Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: Institution, Career, Program, Campus, Institution Set, Business Unit, SetID, Transcript Type, Transcript Rpt, Advisement Rpt, Adm Rec Center, Adm Appl Center, Adm Actions, Program Actions, Tests, Enrollment Access ID, Graduation Status, Academic Org, Effdt, Node From and Node To. Source tables used to create a Parent Institution value used for Institution prompt: | SetID: PS_SEC_SETID_OPR  
Academic Org PS_SCRTY_TBL_ACAD  
Advising Note PS_SAA_NOTE_ACCESS  
Business Unit PS_SEC_UNITSF_OPR  
Institution Set PS_SEC_ISET_OPR  
Company PS_SEC_COMPANY_OPR |

| QCS_SEC_SACR_STDNT_GRP_COMPARE | | Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: Student Group prompted and Student Groups by Indicator, Inquiry and Update Indicators. |

---
<table>
<thead>
<tr>
<th>Query Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>QCS_SEC_SACR_MILESTONE_COMPARE</td>
<td>Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: Milestone prompted and Milestones by Indicator, Inquiry and Update Indicators.</td>
</tr>
<tr>
<td>QCS_SEC_SACR_3C_SCRTY_COMPARE</td>
<td>Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: 3C Group prompted and 3C Groups by Indicator, Inquiry, Update, Delete Indicators.</td>
</tr>
<tr>
<td>QCS_SEC_SACR_SRVC_IND_COMPARE</td>
<td>Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. SACR Security in this query are: Service Indicator prompted and Service Indicator by Indicator, Placement and Release Indicators.</td>
</tr>
<tr>
<td>QCS_SEC_SACR_ADV_NOTE_COMPARE</td>
<td>Compare two users Advising Notes access or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. Access is identified as User or Role. Roles are listed if that is the access type.</td>
</tr>
<tr>
<td>QCS_SEC_SACR_SF_COMPARE</td>
<td>Compare two users or enter same user in both prompts to review a single user data. Output is single row per user with values comma separated in field. Student Financials Security in this query are: Business Unit SF, Cashier Office, Company, Credit Card, Item, Institution Set, Set ID, Origin</td>
</tr>
<tr>
<td>QCS_SEC_OPR_DEF_TBL_CS_VALUES</td>
<td>Displays a user’s operator default values they have saved. Prompted by institution which maps to the user’s HR Company history.</td>
</tr>
<tr>
<td>QCS_SEC_OPR_COMM_SPDKEY_VALUES</td>
<td>Displays a user’s operator default values for Comm SpeedKeys. Prompted by institution which maps to the user’s HR Company history.</td>
</tr>
</tbody>
</table>
## Finance Security Reporting

**Audience:** College Security Administrators

<table>
<thead>
<tr>
<th>FS Pillar Only</th>
<th>QUERY NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI Publisher Report to Excel</td>
<td>BFS_SEC_OPDF</td>
<td>Used by Colleges for Off Boarding an employee to capture the Finance Operator defaults &amp; other module-based security assigned to a user in the business unit. Includes Operator Default Product Preferences data for products we use, Data sources from the OPR_DEF_TBL - AM, AP, AR, BI, CA, FS, GL, OM, OB, OBT, OLE, PM, RTM, VND. Data is also included for assignments to Process Groups, Paycycles, Department Manager, P-Card Proxies, Buyer, Requestor, Treasury Payments, Vendors, Commitment Control rules, and Grants. Report also displays the prompted employee’s Job Information, HR Status, operator profile settings, jobcode description), and all Roles Assigned to User in FS. Must be run from Reporting Tools &gt; BI Publisher &gt; <a href="#">Query Report Scheduler</a></td>
</tr>
<tr>
<td>QFS_SEC_OPR_DEF_TBL_FS_OPRCLS</td>
<td>Displays the OPRCLASS by the Business Unit for Users in OPR_DEF_TBL_FS.</td>
<td></td>
</tr>
<tr>
<td>QFS_SEC_OPR_DEF_TBL_VNDR_COMP</td>
<td>Compare two users or enter same user in both prompts to review a single user data. Displays Supplier Entry Status, Entry Role Name, Approve Role Name, Supplier Active Status, Authority to View, Supplier Audit.</td>
<td></td>
</tr>
<tr>
<td>QFS_SEC_OPR_DEF_TBL_POCOMPARE</td>
<td>Compare two users or enter same user in both prompts to review a single user data. Displays Purchase Order Approval, Role Name, Requisition Approval, Role Name.</td>
<td></td>
</tr>
<tr>
<td>QFS_SEC_OPR_EXP_APPRVR</td>
<td>Operator default data for Expense Approver assignments.</td>
<td></td>
</tr>
<tr>
<td>QFS_SEC_OPR_DEF_RPT_USER_BU</td>
<td>Display the record name of any operator defaults by prompted Business Unit that are assigned to a prompted Business Unit.</td>
<td></td>
</tr>
</tbody>
</table>
Segregation of duties is the concept of having more than one person required to complete a task. It is an administrative control to prevent fraud, theft misuse of information, or other security compromises.

For example, the person responsible for adding a vendor, should not be able to approve the vendor. You don’t want someone entering a vendor, and vouchering against that vendor, and running a paycycle for example.

Typically, whoever enters the transaction should not be the one approving it.

When onboarding a new hire, it is critical to consider any segregation of duties issues while assigning roles.

It is also critical to review Segregation of duties issues twice a year for audit purposes as well.

The primary permission list must correspond to the prompted Unit for operator to be selected in query results.

Includes drilldown to role details when run to HTML.

<table>
<thead>
<tr>
<th>QFS_SEC_SEGREGATION_OF_DUTIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segregation of duties is the concept of having more than one person required to complete a task. It is an administrative control to prevent fraud, theft misuse of information, or other security compromises. For example, the person responsible for adding a vendor, should not be able to approve the vendor. You don’t want someone entering a vendor, and vouchering against that vendor, and running a paycycle for example. Typically, whoever enters the transaction should not be the one approving it. When onboarding a new hire, it is critical to consider any segregation of duties issues while assigning roles. It is also critical to review Segregation of duties issues twice a year for audit purposes as well. The primary permission list must correspond to the prompted Unit for operator to be selected in query results. Includes drilldown to role details when run to HTML.</td>
</tr>
</tbody>
</table>
# Navigation and Role Reporting

**Audience:** College Security Administrators

<table>
<thead>
<tr>
<th>XX = CS - Campus</th>
<th>FS - Finance</th>
<th>HC - Human Resources</th>
<th>QUERY NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>QXX_SEC_ROLE_NAVIGATION_ACCESS</td>
<td>Displays user friendly menu navigation by Role and Page Access</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>QXX_SEC_PSROLECANGRANT_LOCAL</td>
<td>Displays all security roles that can be applied by local security admins</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>QXX_SEC_LSA_EMAIL_CONTACTS</td>
<td>Displays the Name and Email for users with the ZZ Local Security Admin role intended to be used by LSA’s to contact each other.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### SBCTC Security Reporting

**Audience:** SBCTC Security Administrators

<table>
<thead>
<tr>
<th>XX = CS - Campus FS - Finance HC - Human Resources</th>
<th>QUERY NAME</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Pillars</td>
<td>QXX_SEC_OPR_ROLES_NO_JOB_SBCTC</td>
<td>Displays users that have Roles assigned in the Pillar and but no record in JOB or historical EARNINGS_BAL record. In Fin &amp; HCM, must also have a Primary Permission List assigned and in CS, must also Parent Institution value. Source tables used to create a Parent Institution value:</td>
</tr>
</tbody>
</table>

- SetID: PS_SEC_SETID_OPR
- Academic Org PS_SCRTY_TBL_ACAD
- Advising Note PS_SAA_NOTE_ACCESS
- Business Unit PS_SEC_UNITSF_OPR
- Institution Set PS_SEC_ISET_OPR
- Company PS_SEC_COMPANY_OPR |
Additional Reporting Resources

- ctcLink Reference Center
- ctcLink Reference Center for Query and Reporting
- metaLink

Running a Query in Schedule Query

1. In Query Viewer, under the Search Results, click on the Schedule link.
2. The Scheduled Query page will appear, prompting you to either create a new or find an existing Run Control ID.
3. Run Control IDs are tied to a user ID and are visible only to the creator. Instead of entering the same values each time a query is scheduled; a Run Control can be saved with these settings. The next time the query is scheduled, the Run Control ID is selected and the system completes the settings with the previously defined parameters.
   a. To run an existing Run Control ID, click the Find an Existing Value tab. Type in the name of the Run Control ID you wish to retrieve. Click Search. Click on the Run Control ID you want to run.
   b. To create a new Run Control ID, click on Add a New Value tab. Type a Run Control ID, using alpha numeric characters with no spaces. Underscore should be used for spacing. Click Add.
4. If there are prompt(s) associated with the query (i.e. Institution or Business Unit), a pop-up screen will appear asking you to populate the prompt(s). Not all queries will have prompt(s).
5. The Process Scheduler Request screen will appear. Select additional choices on how the Scheduled Query will run.
   a. Server Name should remain blank.
   b. Recurrence should be left blank.
6. From the Process List, use the dropdowns to make the below choices.
   a. Type = Web.
   b. Format = TXT or XLS will result in an Excel output file.
   Click OK.
7. Click on the “Process Monitor” hyperlink.
8. Click on the “Refresh” button periodically until the “Run Status” says Success.
9. Click on the “Details” link.
10. Click on the “View Log/Trace” link to retrieve the Scheduled Query results.
11. Click on the output file and it will download or ask you what you want to do with the file.

Running a BI Publisher Report in Query Report Viewer

Reporting Tools > BI Publisher > Query Report Viewer. Enter the name of the report and click the Search button. Click on the “View Report” hyper link found to the left of the report name in the Report Definition grid. Enter the desired prompt values and then click the OK button.
Running a BI Publisher Report in Query Report Scheduler

Reporting Tools > BI Publisher > Query Report Scheduler.

1. If this is the first time running the report the click on “Add a New Value” tab. Enter a unique name that identifies this report to you so it will be easy to recognize the next time the report is run.
   a. This only has to be done once. Next time the report needs to be run it can be found by going to Query Report Scheduler and clicking on the Search button. Report name and prompt values from last time the report was run have been saved and can be used again or prompt values can be changed.
2. Data Source Type is “Connected Query”.
3. Enter the name of the report.
4. Enter the desired prompt values.
5. Click “Run”.
6. Click “OK”.
7. Click on the “Process Monitor” hyperlink.
8. Click on the “Refresh” button periodically until the “Run Status” says Success.
9. Click on the “Report Manager” hyperlink.
10. Click on the “Administration” tab.

Running a Pivot Grid Report in Pivot Grid Viewer

1. Enter the name of the pivot grid into the “Pivot Grid Name” field.
2. Click “Search”,
3. Click on the blue hyperlink to select the pivot grid.
4. The prompts are located on the left side of the page.
5. Click on the magnifying glass on the appropriate prompt to find the data you are looking for.
6. Click the “Search” button.
7. There may be a “More Options” hyper link. If so, click on this to get more prompt options.

Running an nVision Report from Define Report Request

1. Enter or look up your Business Unit.
2. Click “Search”,
3. Reports that you have access to run will be displayed. Click on the blue hyperlink to select.
4. Click the “Run Report” button.
5. Click “OK”.
6. Click on the “Process Monitor” hyperlink.
7. Click on the “Refresh” button periodically until the “Run Status” says Success.
8. Click on the “Report Manager” hyperlink.
10. Click the File Name to download the file to Excel.

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