

Processing Brio Reports

Prerequisite(s): Banner sprod account

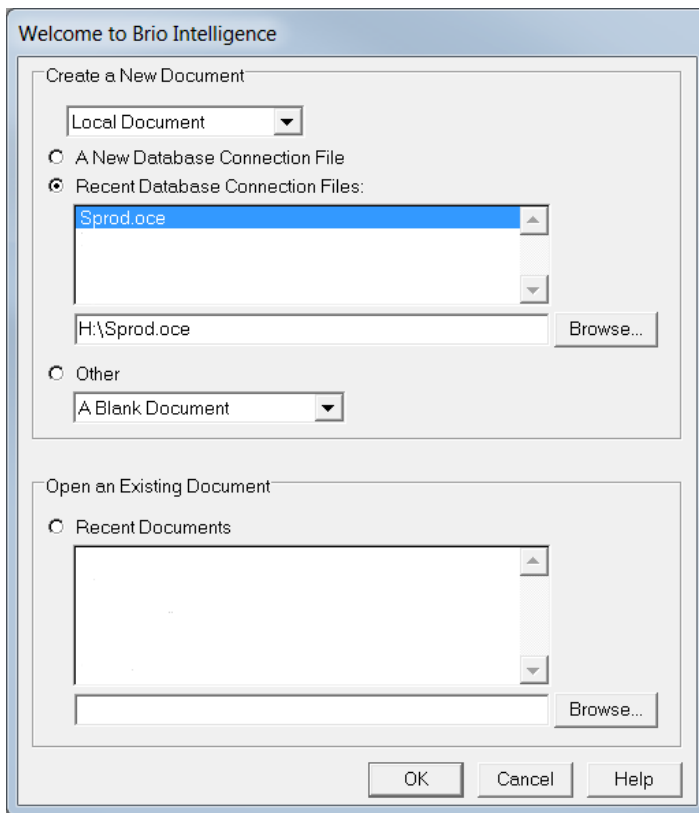
Brio installed on computer

Access to O:\Interdepartmental\Dashboard-Reports (read-only)

1 Launch Brio



Double-click on the Brio icon on your desktop.



Select Sprod.oce on your personal H drive.
Click OK.

If you do not have this as an option see document: 'One Time Brio Setup'.

HINT: YOU MAY SEE DOCUMENTS UNDER 'RECENT DOCUMENTS'. DO NOT OPEN A DOCUMENT FROM THIS LOCATION. YOU MUST FIRST ESTABLISH A CONNECTION WITH THE RECENT DATABASE CONNECTION FILE.

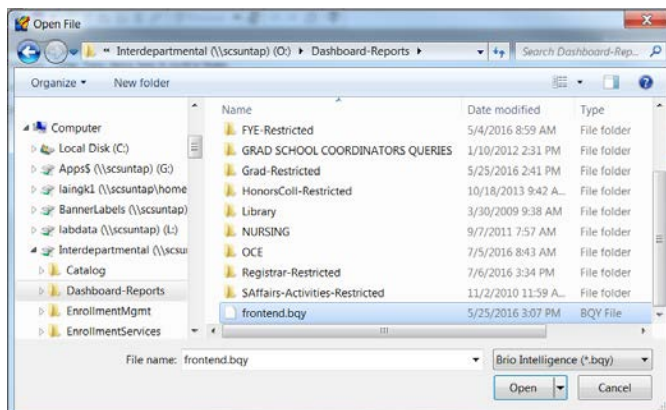


Enter your sprod username and password in the Host User and Host Password fields.

Click OK.

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2 Open the 'Dashboard' of Available Reports

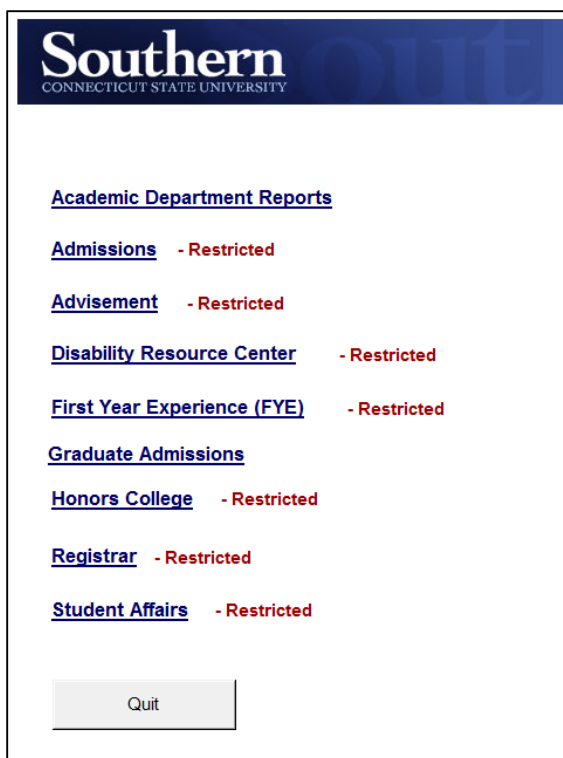


From the File menu, select Open.

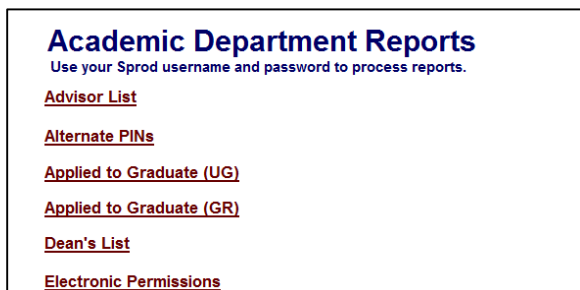
Navigate to:

O:\Interdepartmental\Dashboard-Reports\frontend.bqy

Click Open.



Single-click 'Academic Department Reports'



Example 1:

Single-click on 'Advisor List'

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3 Login and Select parameters

Advisor List

Username:

Password:

Term:

Type:

Major:

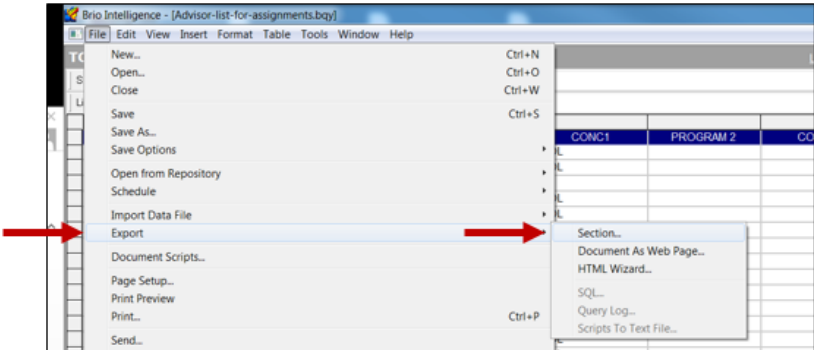
 To export results:
When process is complete, from the File menu, select
Export --> Section.
 Select the location and file type, name the document, and save.

Enter Banner sprod Username and Password.
Select the Term from the drop-down menu.
Select the Student Type:
New – incoming freshmen for term selected
Transfer – incoming transfer for term selected
Continuing – current students
ReAdmit – students coming back after a break in matriculated enrollment
Select Major from drop-down menu.
Click Process.

When the report is done processing the results will display.

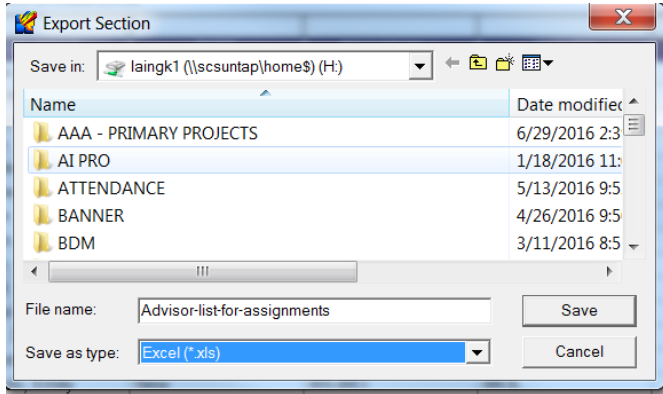
	ID	LAST	FIRST	
1				ad
2				ah
3				ah
4				ak
5				alt
6				alc
7				all
8				al

4 Export the Results



To export results to Excel ®
From the File menu select
File → Export → Section

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Navigate to where you want to save the file.
Select 'Save as type' (note Excel is an old version).
Enter File Name.
Click Save.

HINT: YOU MAY NEED TO CUT & PASTE EXCEL RESULTS INTO A NEWER VERSION DEPENDING UPON THE SECURITY SETTINGS ON YOUR COMPUTER.

To return to login page in Brio, click the left pointing blue arrow in the upper right corner. To get to Main Menu, click 'Return to Menu' button.

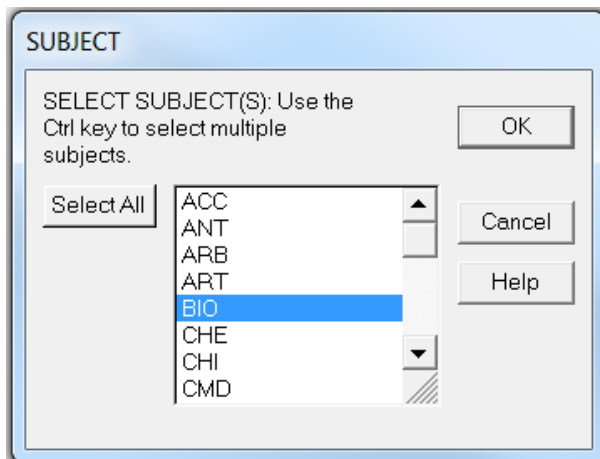
5 Example Two



Example 2:
Single-click 'Electronic Permissions'

Enter Banner sproid username and password.
Select Term from drop-down menu.
Select to process by Course or by Username of Permission Granter.
Click Process.

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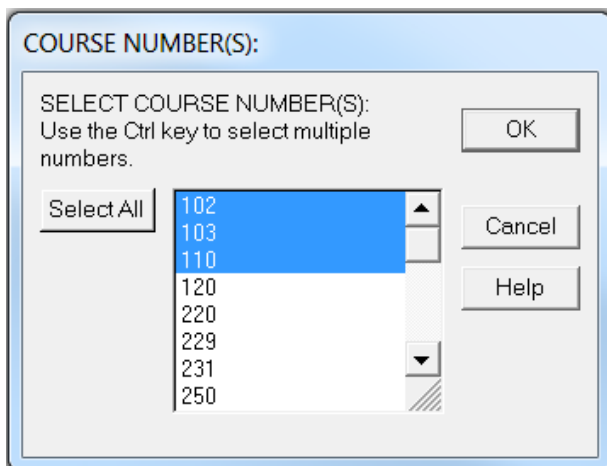


If selected 'By Course', you will be prompted to select subject(s).

Select Subject(s).

Click OK.

HINT: MANY OF THE REPORTS PROMPT THE USER TO SELECT PARAMETERS. FOR EXAMPLE: GPA >= X; FULL-TIME OR PART-TIME STATUS; COURSE REFERENCE NUMBER (CRN). READ THE PROMPT AND SELECT OR ENTER AS APPROPRIATE.



Select Course Number(s).

Click OK.

Results include information on the Student, Type of Permission granted, User who entered the permission, Date Entered, and whether or not the student has registered. Report can be printed, or export using steps above. However, you may want to export to pdf for the type of report, rather than Excel.

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Electronic Permission Slips

Fall 2016

CRN: NONE BIO 102-

<u>Id</u>	<u>Student</u>	<u>Permission Code</u>	<u>Banner Username</u>	<u>Date Entered</u>	<u>Registered</u>
		PREREQ	GRACE_S	04/07/16	BIO 102-04
		CHAIR	GRACE_S	04/07/16	BIO 102-04
		CHAIR	GRACE_S	04/05/16	BIO 102-03
		PROGRAM	WALKER_X	04/14/16	-
		PROGRAM	WALKER_X	04/13/16	BIO 102-02
		TIME	GRACE_S	04/04/16	BIO 102-01
		CLOSED SEC	ALFARO_A	06/15/16	BIO 102-03
		ACAD ADVS	MIELCZARSKI_J	04/13/16	-
		PREREQ	GRACE_S	04/12/16	-
		CHAIR	GRACE_S	04/12/16	-

CRN: 11956 BIO 102-02

<u>Id</u>	<u>Student</u>	<u>Permission Code</u>	<u>Banner Username</u>	<u>Date Entered</u>	<u>Registered</u>
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