



Information Paper: DTS BI and Reporting Tool Indicator

BI and Reporting Tool

The **BI and Reporting Tool (BIRT)** allows authorized individuals to run pre-determined reports and create customized reports using data elements pulled from DTS documents and profiles. Authorized personnel can access this advanced reporting option under the **DTS Dashboard, Reports and BI and Reporting Tool**.

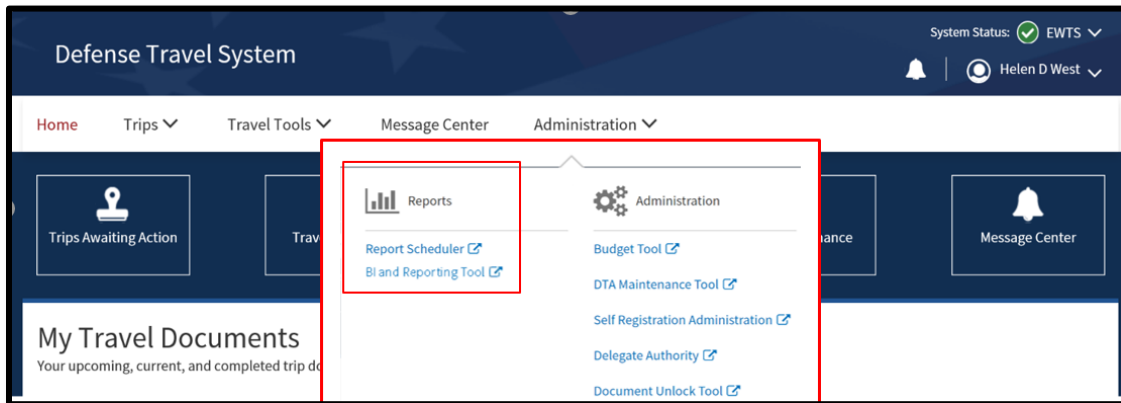


Figure 1: DTS Dashboard

BIRT Access Indicators

The **Update Person** and **Create Person** screens in the **DTA Maintenance Tool's People** module contain two BIRT Access indicators (Figure 2) under **User Specific Data**.

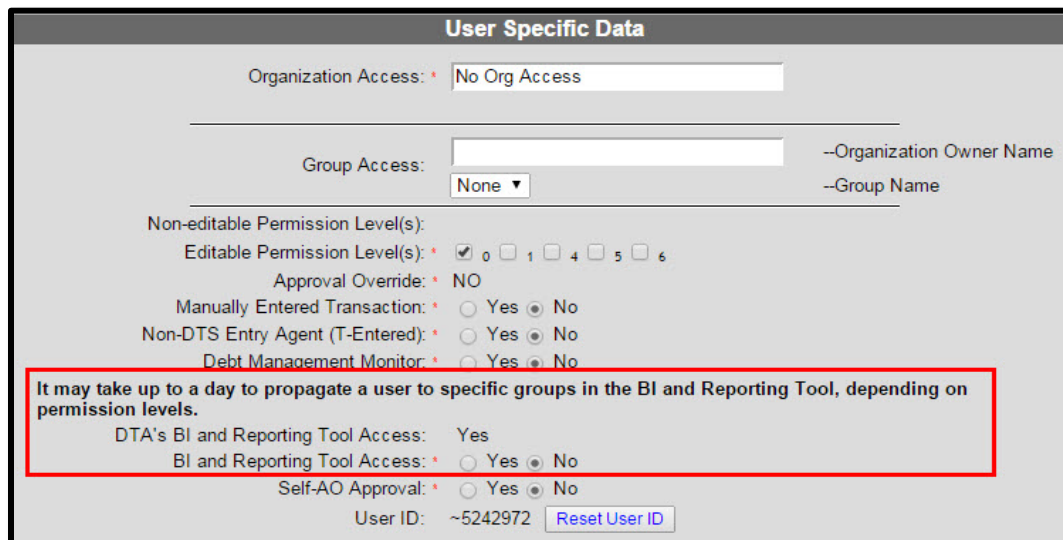


Figure 2: Update Person Screen – BI and Reporting Tool Indicators



**BIRT
Access
Indicators
(continued)**

DTA's BI and Reporting Tool Access – This field is always read-only. It indicates whether you (the DTA accessing the profile) have BIRT access or not.

BI and Reporting Tool Access – This field indicates if the person's profile has BIRT Access. It reflects selectable radio buttons if you are authorized to edit other people's BIRT Access (see **Updating BIRT Access** below). Otherwise, the display is read-only, and indicates whether the person whose profile you are accessing has BIRT access or not.

**Updating
BIRT Access**

You can edit another person's **BIRT Access** if your own DTS profile (Figure 3) shows:

- You have permission level 5.
- The **BI and Reporting Tool Access** indicator is set to **Yes**.

Note: Both **BI and Reporting Tool Access** indicators display as read-only when you access your own DTS profile, regardless of your actual permissions.

The screenshot shows the 'User Specific Data' form with the following fields and values:

- Organization Access: (All)
- Group Access: (All) [dropdown]
- Non-editable Permission Level(s): [checkboxes 0-6]
- Editable Permission Level(s): [checkboxes 0-6, level 5 is checked]
- Approval Override: NO
- Manually Entered Transaction: NO
- Non-DTS Entry Agent (T-Entered): YES
- Debt Management Monitor: YES
- DTA's BI and Reporting Tool Access: Yes
- BI and Reporting Tool Access: YES
- Self-AO Approval: NO
- User ID: u1025268977
- Reset User ID [button]

Figure 3: Update Person Screen – DTA's Personal Profile

**Validation
Error**

When you are creating or updating another user's DTS profile, setting the **BI and Reporting Tool Access** indicator to **Yes** will cause a Validation Error (Figure 4) when you try to save the changes if:

- The person does not have organization access
- The person does not have at least one permission level assigned



Validation Error

The following input validation errors have occurred:

- BI and Reporting Tool Access can only be designated as "Yes" for a person that has at least one permission level defined and also has organization access defined.

Figure 4: BI and Reporting Tool Access Validation Error

Make the corrections that caused the validation error. Save the changes to the User's Profile. Then have individual log into DTS and verify access to the **BI and Reporting Tool**.