



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.**

**Although you won't see it spelled out in DTS, "BI" stands for "Business Intelligence."*

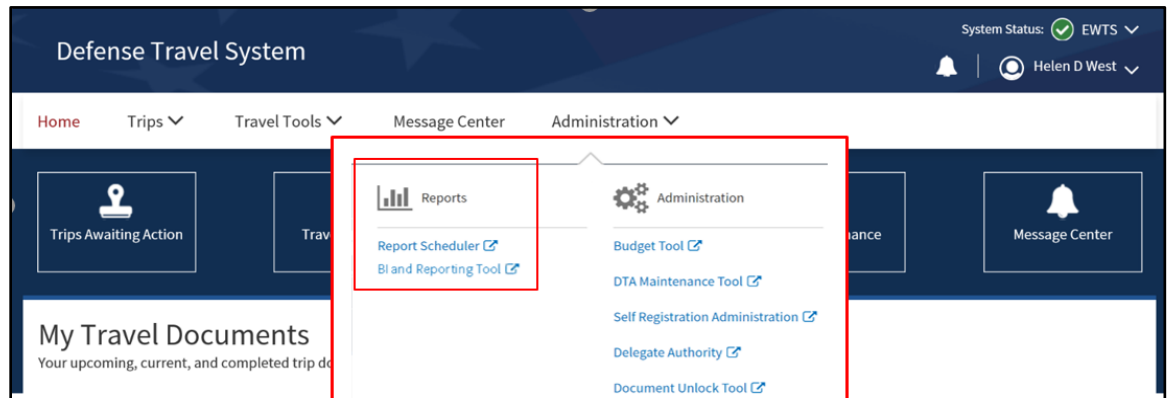


Figure 1: DTS Dashboard

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**.

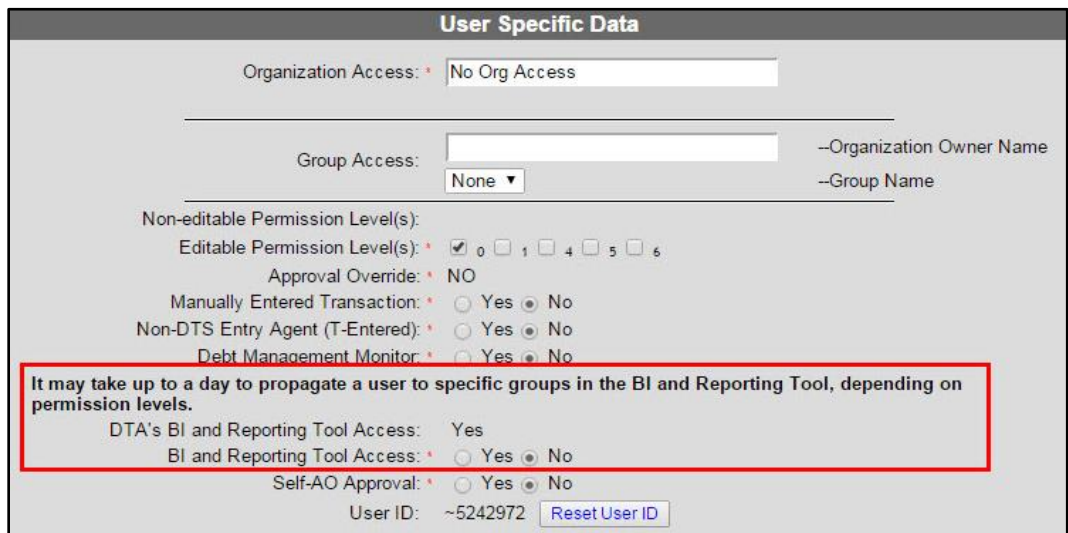


Figure 2: Update Person Screen – BI and Reporting Tool Indicators

**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 menu)
- Non-editable Permission Level(s):
- Editible Permission Level(s): 0, 1, 4, 5 (selected), 6
- 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 (highlighted)
- Self-AO Approval: NO
- User ID: u1025268977
- Reset User ID (button)

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

**Validation
Error**

When you create or update 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

Correcting Validation Error and Log on

1. To resolve the validation error, review the message, and make the corrections in the **User** profile. Be sure to save the changes.
2. Instruct the individual to log into DTS, and from the **DTS Dashboard**, select the **BI and Reporting Tool**.
3. The user should see a **BI and Reporting Tool Welcome** screen (Figure 5).

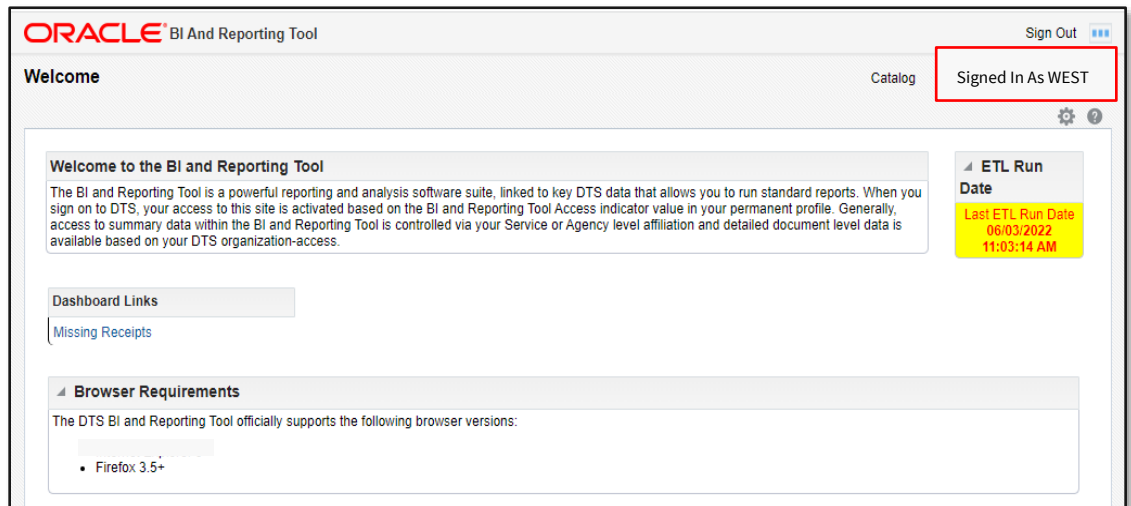


Figure 5: BI and Reporting Tool - Welcome Screen