

Using BI Publisher with PeopleSoft Query for Report Developers

Introduction

The following describes the basic steps used in creating and publishing reports using BI Publisher (BIP) with PeopleSoft Query. This document explains procedures for users with the **Report Developer** security Role. Those users with the **Power User** Role, - *except for the inability to register Data Sources* - can generally perform the tasks below as well.

There is a chart at the end of the document ([Appendix A](#)) that displays the access available to these two groups.

This documentation is divided into these main sections:

- [BI Publisher Overview](#)
- [Installing Oracle BI Publisher Desktop](#)
- [How to Use BI Publisher](#) through to **Query Viewer** or **Query Report Scheduler**
 - 1) [Create a query or modify an existing query](#)
 - 2) [Register Data Source](#)
 - 3) [Create a Template in Word](#)
 - 4) [Set Up Report Definition](#) – associate with Template
 - 5) Run, View and Save the BI Publisher Report
- [Appendix A](#): Chart displaying access for Report Developer and Power User
- [Appendix B](#): Links to other documentation

NOTE regarding Communication Generation (Comm Gen)

In addition to the reporting capabilities discussed here, BI Publisher enables you to manage and merge communication templates and data source files for the **Communication Generation** process to generate letters or emails. **Comm Gen** will not be reviewed here, but you can read about it in detail on the [Comm Gen page](#) in the SFIS Blog.

Before you can work with BI Publisher, you need to:

- Install Oracle BI Publisher Desktop through Design Helper

Important Note regarding Active Status:

There are three places in **PeopleSoft** where **Status** needs to be changed to **Active** –

- (1) *Data Source* *
- (2) Report Definition [Definition page] and
- (3) Report Definition [Template page].

If these Statuses are not changed to **Active**, various processes will not run.

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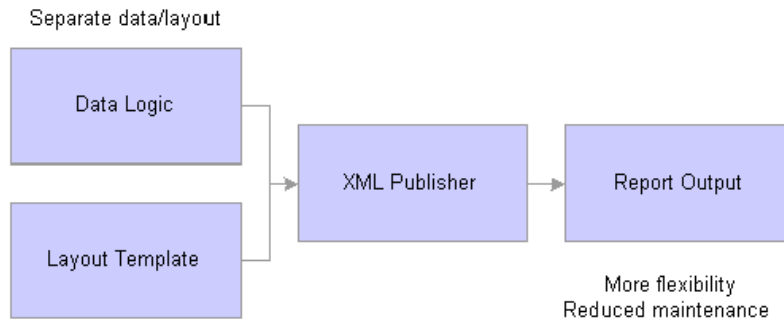
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BI Publisher Overview

BI Publisher is a standalone Java-based reporting technology (formerly XML Publisher or XMLP) that streamlines report and form generation. A primary feature of Oracle's BI Publisher product is the separation of the data extraction process from the report layout. BI Publisher provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, it can generate reports in many formats.

The following diagram illustrates the concept of BI Publisher.



Select features of Oracle's BI Publisher product have been integrated into and enhanced for use with PeopleTools. BI Publisher provides an environment for managing templates, data sources, reports, and content components. It also offers an electronic bursting capability to produce reports according to user-defined criteria, and the reports can be secured using an application's security join table.

There are two aspects of this integration:

1. Design time, during which a report definition is registered, and a data source is associated with a template.
2. Runtime, when the definitional information is called by the page viewer or processing program to produce the formatted output.

The BI Publisher Menu Navigation is: Main Menu > Reporting Tools > BI Publisher. These are the Functional Area Navigation (FAN) menu contents of BI Publisher available to **Report Developers** and **Power Users**

Note: The Data Source, Translations, Report Category and Global Properties options are only available to those with the Report Developer Role.

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Below are descriptions of the pages found under these menus.

Report Developer

The screenshot shows the BI Publisher menu with the following items:

- Data Source**: Register schema and sample data files for BI Publisher data sources.
- Report Definition**: Define reports by associating Data Sources with layout Template files.
- Content Library**: Create and maintain reusable Sub-Template definitions.
- Translations**: Register Translation XLIFF files for Report RTF templates and Content Library RTF sub-templates.
- Query Report Viewer**: Run Query-based BIP reports real-time. View in a window.
- Query Report Scheduler**: Schedule Query-based BIP reports. Use to run bursted reports.
- BIP Report Search**: Locate BI Publisher report output using enhanced search criteria.
- Setup**: Prepare for using BI Publisher.
 - Report Category
 - Global Properties
 - Design Helper

Data Source*: User queries are data sources that the application uses to retrieve data for a BI Publisher report.

- When creating a report definition, you can select a PeopleSoft Query data source that has not yet been registered and that data source is registered automatically once the report definition is saved. However, it is simpler for a Report Developer to register the Data Source beforehand.
- **Note regarding non-query data sources:** Before you create any report – if the data source is not a query [XML files, and various other types of data sources] - you must create and register a data source.

Report Definition: This is where you describe various aspects of your report and associate the data source with a template. The pages under Report Definition are:

- Definition – Specify description and category of report.
- Template – Upload the template file once it's been created.
- Output – Specify the output report format and set a default format.
- Security – Specify the Role or User who should have access to the report.
- *Bursting ** – Specify the criteria if you need to burst the report. Leave it blank if bursting is not needed.

Content Library: A component provided for the registration of reusable sub-template files.

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- You may have text, images, or logic in your templates that you want to reuse across many report templates. Examples include address information or standard language. Rather than replicate this text and/or code in every template, you have the ability to store sub-template files that include the reusable content.

Translations *: *Language translation.*

Query Report Viewer: The Query Report Viewer allows selection and online viewing of those reports that have a data source type of PeopleSoft Query.

- Existing Query security applies so that each user has access to run only the reports to which he or she has qualified Query access to the data source. You can save reports from the Viewer.

Query Report Scheduler: Schedule reports.

BIP Report Search: Search for reports.

Design Helper: One of the items on both menus, under **Setup**, is **Design Helper** (it is the last option on the FAN menu).

- **Design Helper** is the point from which you will install Oracle BI Publisher Desktop.

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Installing Oracle BI Publisher Desktop (Design Helper)

IMPORTANT: Before you can utilize BI Publisher, you must install an add-in called **Oracle BI Publisher Desktop** through the use of the **Design Helper**. Navigate to **Main Menu > Reporting Tools > BI Publisher > Setup > Design Helper**. Following are the menus available under Setup.



When you click on the link shown below under **Design Helper**, you will be instructed to download the Template Builder. Refer to the Oracle document entitled [Creating PeopleSoft Reports Using XML Publisher](#) for information about using the **Design Helper**.



Having trouble downloading the Design Helper?

Depending on the version of Office you have on your computer, the download process may not go as smoothly as indicated in the instructions. If that occurs, please send a Service Now ticket to Desktop Support explaining the situation in detail.

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Getting Started with BI Publisher:

1. Create a query or modify an existing query

- a. To maximize the value of this tool, use it for reports, forms and other documents with output that would not be possible with another product, for example, Word Mail Merge.
- b. Design how the output should appear and determine which fields are required before creating the query.
- c. The query should contain all the fields that need to appear in the report.
- d. The query should also contain fields that will be used in the Word template for grouping purposes, even if they will be hidden in the report.
- e. Keep the query as simple as possible; however, since the query can be used for multiple templates to create multiple reports, thought should be given to what additional fields may be appropriate for future use.
- f. For ease of use when working on the template, arrange the fields in the same order as they will appear on the document.
- g. Do as much formatting as possible within the query itself. For example, it is important that dates and times be formatted through expressions.
- h. Heading Text - Change the Heading Text as needed; for example, make abbreviations full words, etc. since headers may appear on the report. See example below.
- i. Unique Field Name (on the Edit Field Properties page in Query Manager) – If there are expressions used in the query or there are other fields that have a Unique Field Name that are somewhat ambiguous, change Unique Field Name since you will be referencing it when creating the template. A simple, clear name will be easier to work with.
- j. Prompts may be used in the query.
- k. As with any query, best practices for good query design should be employed.
- l. Test the query and note the results for comparison with the report results.
- m. **Query:** For this demonstration of creating a query to register a Data Source, a query has been created based on international schools approved by OIS (**WOIS_EXT_ORGS_NRS_INTL_ONLY**).

i. **Tables:** The query is based on two tables: **EXT_ORG_PRI_VW** and **COUNTRY_TBL**.

ii. **Fields:** These are the fields and their attributes.

Record.Fieldname	Format	Ord	XLAT	Heading Text
A.EXT_ORG_ID - External Org ID	Char11			Org ID
A.EXT_ORG_TYPE - Organization Type	Char4			Org Type
A.PROPRIETORSHIP - Proprietorship	Char4		N	Ownership
A.COUNTRY - Country	Char3	1		Country
B.DESCR - Description	Char30			Country Description
A.DESCR50 - Description	Char50	2		Organization Description

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iii. **Criteria:** The criteria are as follows:

Logical	Expression1	Condition Type	Expression 2
	A.EFFDT - Effective Date	Eff Date <=	Current Date
AND	A.EFF_STATUS - Status as of Effective Date	equal to	A
AND	A.EXT_ORG_TYPE - Organization Type	equal to	NRS
AND	A.PROPRIETORSHIP - Proprietorship	equal to	INTL
AND	(A.COUNTRY - Country	is not null	
OR	A.COUNTRY - Country	greater than	0)
AND	B.COUNTRY - Country	equal to	A.COUNTRY - Country

iv. **Query Output:** The ultimate report will display the institutions categorized and grouped by Country. The beginning of the query results looks like this:

	Org ID	Org Type	Ownership	Country	Country Description	Organization Description
1	500071	NRS	INTL	ARG	Argentina	CIEE: Buenos Aires, Argentina
2	0500510	NRS	INTL	AUS	Australia	SFS Australia: Rainforest Management
3	500018	NRS	INTL	AUS	Australia	Australian National University - NRS
4	500094	NRS	INTL	AUS	Australia	James Cook University - NRS
5	500125	NRS	INTL	AUS	Australia	Murdoch University - NRS
6	500203	NRS	INTL	AUS	Australia	University of Adelaide - NRS
7	500213	NRS	INTL	AUS	Australia	University of Melbourne - NRS
8	500216	NRS	INTL	AUS	Australia	University of Queensland - NRS
9	500221	NRS	INTL	AUS	Australia	University of Sydney - NRS
10	500222	NRS	INTL	AUS	Australia	University of Tasmania - NRS
11	500225	NRS	INTL	AUS	Australia	University of Western Australia - NRS
12	500252	NRS	INTL	AUS	Australia	SIT Australia: Rainforest
13	500154	NRS	INTL	BRA	Brazil	CIEE: São Paulo
14	534913	NRS	INTL	BRA	Brazil	Brown in Brazil
15	555937	NRS	INTL	BRA	Brazil	CIEE: Salvador da Bahia
16	500191	NRS	INTL	CHL	Chile	Universidad Catolica, Chile - NRS

n. Once the query has been created and reviewed:

i. *If you are a **Report Developer** you can do one of the following:*

1. You can **register** this query as a **Data Source** for use in the **Word Template**. You register the query under the **BI Publisher > Data Source** page. Once you have registered the query, when you work in Word Template, you will be observing the output with Sample Data only.
2. You can create or update an existing template without registering the Data Source yet. Then, once the template has been completed, you can register the Data Source.
3. As mentioned in the first option, creating a **Data Source** immediately after creating the query, your template will display only Sample Data.

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- a. However, you can use another method to display actual data during your Template design process. You can download the query as an XML file by clicking on the **Download to XML** link and saving the XML file in an appropriate directory.
 - b. NOTE: Once you are satisfied with the appearance of the Template report output, and you want to test the report online with PeopleSoft, you can **then** create the Bi Publisher **Data Source**.
 - c. To learn more about working with **real data** in Template, review this document: [FAQs about Using Real Data When Designing and Previewing Your Template](#)
- ii. If you are a **Power User**, you can **start** to define a report (Report Definition) in order to download the sample data files to create their templates.

2. How to Register the Data Source (Reporting Tools > BI Publisher > Data Source)

- a. On the Data Source search page, if there is no existing **Data Source**, click on **Add a New Value**
- b. It should default to a **Data Source Type** of **PS Query**. If so, you do not have to make a change. Otherwise, select PS Query from the dropdown.

Data Source

[Find an Existing Value](#)

| [Add a New Value](#)

Data Source Type: PS Query ▼

*Data Source ID:



Private Data Source

Add

[Find an Existing Value](#)

| [Add a New Value](#)

- c. Next to **Data Source ID** you can type the name of the query, or the first few letters to narrow the selection. Once you've done so, the page will resemble the following. In this example, the query name is **WOIS_EXT_ORGS_NRS_INTL_ONLY**.
 - i. To the right is a checkbox labeled **Private Data Source**. Note that the box is **not** checked. This indicates that the query being used is a Public Query.

Data Source

[Find an Existing Value](#)

| [Add a New Value](#)

Data Source Type: PS Query ▼

*Data Source ID:

WOIS_EXT_ORGS_NRS_INTL_ONLY



Private Data Source

Add

[Find an Existing Value](#)

| [Add a New Value](#)

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- d. Once you have typed the query name, click on the Add button. The **Data Source** page will open as follows:

Data Source

Data Source Type PS Query (Private)
Data Source ID WOIS_EXT_ORGS_NRS_INTL_ONLY

Data Source Properties

Description Active

Owner ID

Registered Date/Time 10/29/15 3:48:15PM
Registered By CPIKE01
Last Update Date/Time
Updated By

Related Files

File Type	File	Generate File	Or	Upload File
Sample Data File		Generate	Or	Upload
Schema File		Generate		

- e. **Description:** (Optional) Enter descriptive text that provides more detail about the data source. The description automatically defaults to the **Data Source ID** when you click Save.
- f. **Owner ID:** (Optional) Indicate which product, feature, or application owns this data source.
- g. **Registered Date/Time:** This is a read-only field maintained by the system that indicates the date that the initial data source registration was made.
- h. **Last Update Date/Time:** This is a read-only field maintained by the system that indicates the date that the last update to the data source was made.
- i. **Active:** If not already checked, select to indicate that this is an **active data source**.
- i. Only **active data sources** can be chosen when creating a new Report Definition.
 - ii. Only reports with **active data sources** can be processed.
- j. **Registered By:** This is a read-only field maintained by the system that indicates the user ID of the operator who initially registered the data source.
- k. **Updated By:** This is a read-only field maintained by the system that indicates the user ID of the operator who last updated the data source.
- l. Click **Generate** under the **Generate File** column for **Sample Data File**.
- m. Click **Generate** under the **Generate File** column for **Schema File**.
- n. After the Data Source is generated, an **XML file** for WOIS_EXT_ORGS_NRS_INTL_ONLY is created. Click the **Save** button.

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Data Source

Data Source Type PS Query (Private)

Data Source ID WOIS_EXT_ORGS_NRS_INTL_ONLY

Data Source Properties				
Description	WOIS_EXT_ORGS_NRS_INTL_ONLY	<input checked="" type="checkbox"/>	Active	
Owner ID	<input type="text"/>			
Registered Date/Time	10/29/15 3:50:59PM			
Registered By	CPIKE01			
Last Update Date/Time	10/29/15 3:50:59PM			
Updated By	CPIKE01			

Related Files				
File Type	File	Generate File	Or	Upload File
Sample Data File	WOIS_EXT_ORGS_NRS_INTL_ONLY.XML	Regenerate	Or	Upload
Schema File	WOIS_EXT_ORGS_NRS_INTL_ONLY.XSD	Regenerate		

- o. To take a look at the **XML file**, click the [WOIS_EXT_ORGS_NRS_INTL_ONLY.XML](#) link.
 - i. The browser appears and displays the XML data in the file. Below is the beginning of the XML file:

This XML file does not appear to have any style information associated with it. The document tree is shown below.

```
<?xml version="1.0" encoding="UTF-8" standalone="no" ?>
<query xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" numrows="10" queryname="WOIS_EXT_ORGS_NRS_INTL_ONLY" xsi:noNamespaceSchemaLocation="">
  <row rownumber="1">
    <EXT_ORG_ID>EXT_ORG_ID</EXT_ORG_ID>
    <EXT_ORG_TYPE>EXT_</EXT_ORG_TYPE>
    <PROPRIETORSHIP>PROP</PROPRIETORSHIP>
    <DESCR>DESCR sample data</DESCR>
    <COUNTRY>COU</COUNTRY>
    <DESCR50>DESCR50 sample data</DESCR50>
  </row>
  <row rownumber="2">
    <EXT_ORG_ID>EXT_ORG_ID</EXT_ORG_ID>
    <EXT_ORG_TYPE>EXT_</EXT_ORG_TYPE>
    <PROPRIETORSHIP>PROP</PROPRIETORSHIP>
    <DESCR>DESCR sample data</DESCR>
    <COUNTRY>COU</COUNTRY>
    <DESCR50>DESCR50 sample data</DESCR50>
  </row>
  <row rownumber="3">
    <EXT_ORG_ID>EXT_ORG_ID</EXT_ORG_ID>
    <EXT_ORG_TYPE>EXT_</EXT_ORG_TYPE>
  </row>
</query>
```

- ii. Save the XML file in an appropriate directory. You will be accessing the **XML file** in **Step 4** when you create the Word template.
 - iii. Note that you can create the Report Definition at any time.

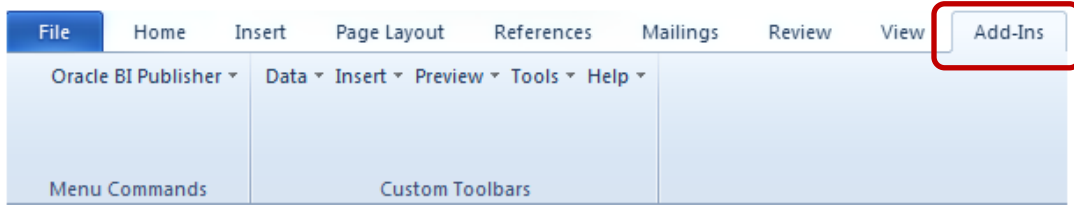
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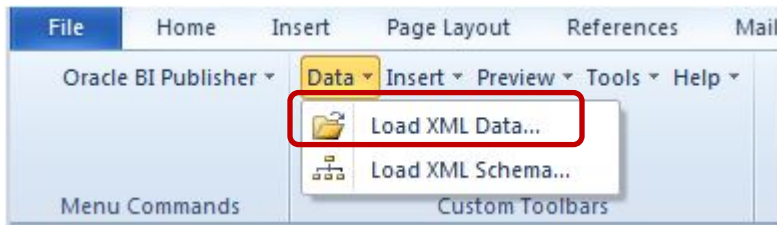
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3. Create a Template in Word

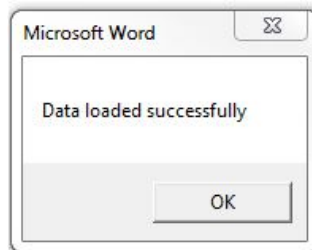
- a. Once the **Sample Data (XML file)** has been saved, open Word
- b. Select **Add-Ins** from the menu



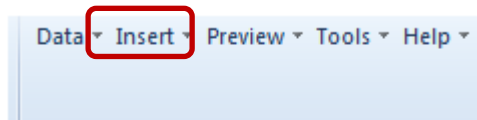
- c. To gain access to the **XML Data**, click on **Data – Load XML Data...**



- d. Windows Explorer opens. Navigate to the directory where you saved the **XML file** (in this example, **WOIS_EXT_ORGS_NRS_INTL_VER2.XML**)
- e. Click to open the file. When the following message appears, click OK.



- f. For this demonstration, we are creating a table that will be categorized by Country. As you can see from this menu, there are a number of ways to begin working in Word.
 - i. To begin inserting the fields and formatting the template, click on Insert.

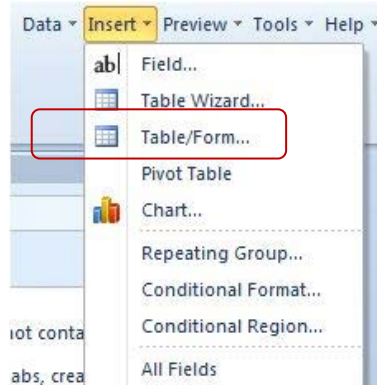


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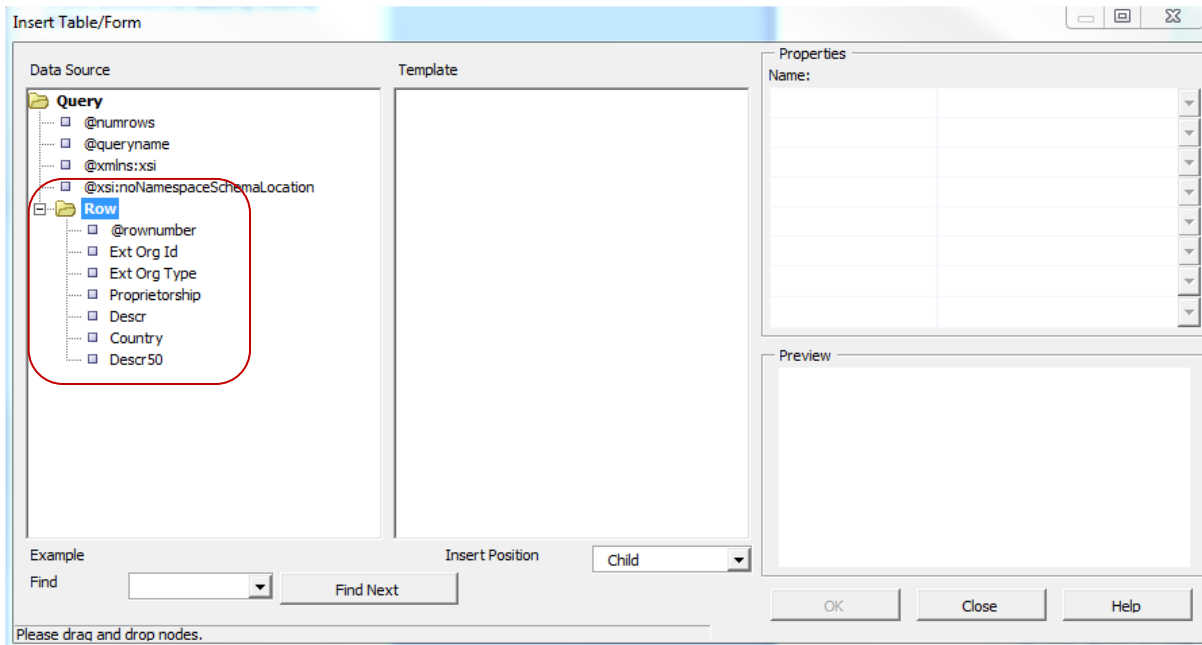
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- ii. The Insert menu appears as follows. There are a number of methods for inserting the fields into the Word template. In addition, there are many ways to format and otherwise refine the final output. The easiest way to display all rows of data is to use the **Table Wizard**.
- iii. For this example, click on **Table/Form**.



- g. The following form opens displaying information about the query, including the field names (under **Row**).

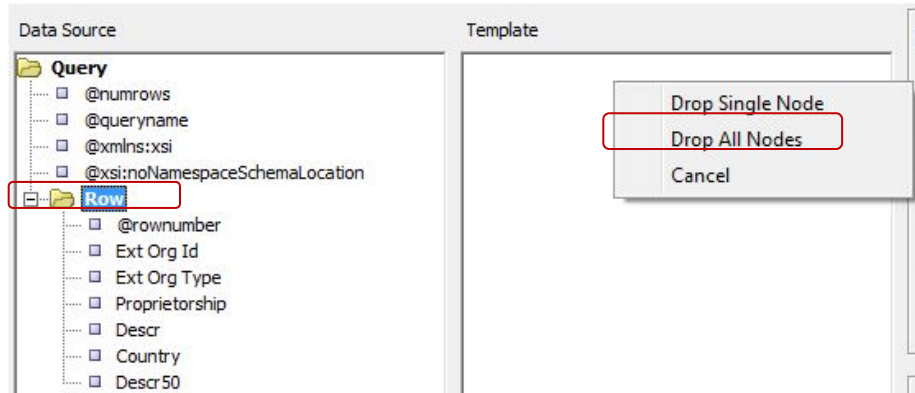


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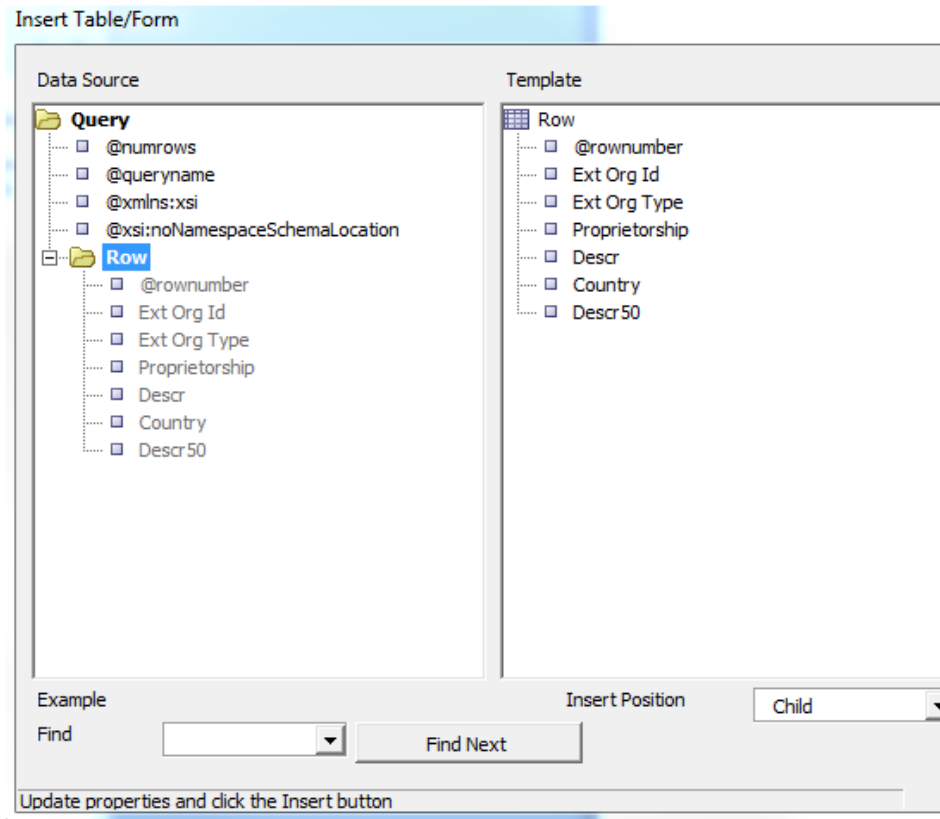
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- h. Click on **Row** and drag it from the first column to the middle column (headed **Template**) and select **Drop All Nodes** from the popup menu that will appear.



- i. Your other options are **Drop Single Node** or **Cancel**, i.e. you can drop nodes one at a time or cancel the process. Dropping all at once, and then deleting, is generally the most effective method. (To see a demonstration dropping single nodes, review the document [INSERT TABLE/FORM – Setup and Formatting](#).)

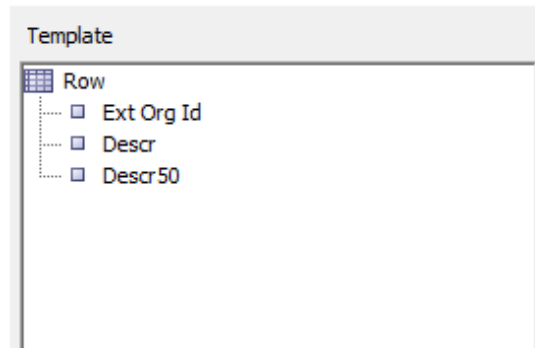


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- i. Delete the following fields from the Template column by selecting the field and right-clicking to delete.
 - i. @rownumber
 - ii. Ext Org Type (Org Type)
 - iii. Proprietorship (Ownership)
 - iv. Country (Country Code)
- j. There will be three fields remaining in the center panel. The Template panel will now appear as follows:

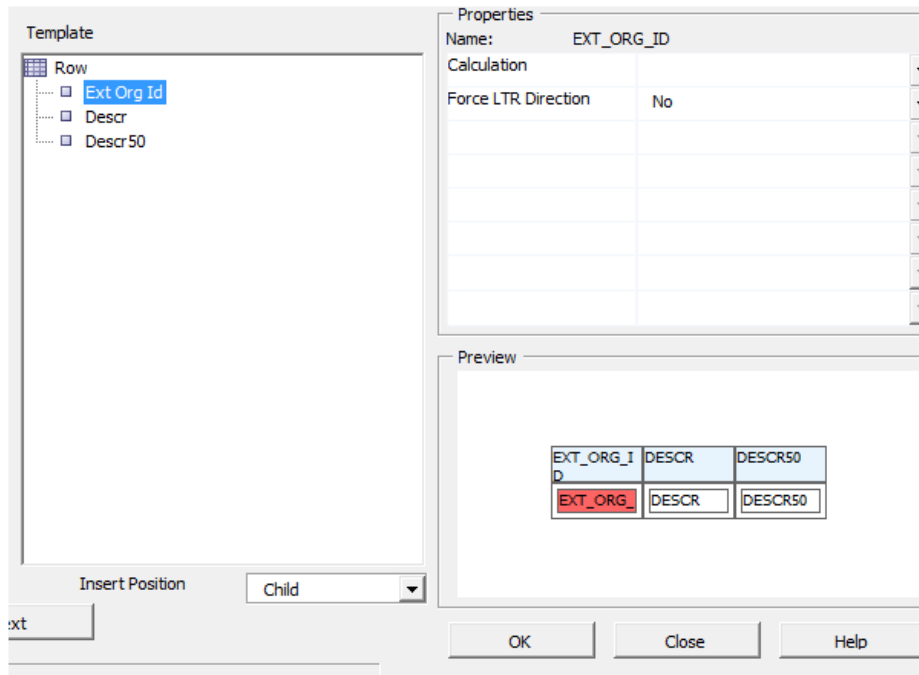


- k. All of the fields should be directly beneath **Row** as shown above. Note: If you were to do a sub-grouping - which is not covered here - the display would be different.
- l. If you click on any of the fields or on **Row**, the properties in the third panel (Properties) will change. You can see below that the **Ext Org Id** field is highlighted in the center panel, and that the properties appear on the right. Also note that in the "Preview" section below that the highlighted field is displayed in a different color.

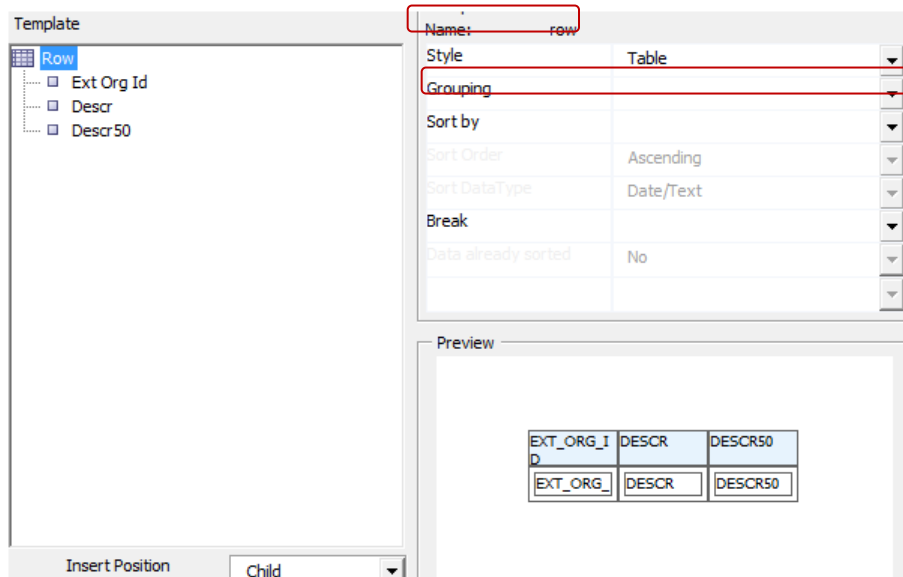
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m. When you click on **Row**, the right panel shows these options:



n. Next, provide the grouping details.

i. With the Properties window **Name** as **“row”**

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- ii. Click on the down arrow next to **Grouping**, so that it lists the fields as follows.

The screenshot shows the 'Properties' dialog box for a 'row' object. The 'Grouping' property is currently empty, and its dropdown menu is open, displaying three options: 'EXT_ORG_ID', 'DESCR', and 'DESCR50'. The 'EXT_ORG_ID' option is currently selected and highlighted in blue. Other properties visible include 'Style' (Table), 'Sort by' (empty), 'Sort Order' (empty), 'Sort DataType' (empty), 'Break' (empty), and 'Data already sorted' (No).

- iii. Select DESCR (which is the Country Name field) from the dropdown list for the **Grouping** property.

The screenshot shows the 'Properties' dialog box with the 'Grouping' property now set to 'DESCR'. The 'Sort by' property is also set to 'DESCR', 'Sort Order' is 'Ascending', and 'Sort DataType' is 'Date/Text'. Below the properties is a 'Preview' section showing a grid structure. The grid has three columns: 'EXT_ORG_I', 'DESCR', and 'DESCR50'. The first row is preceded by a 'G' (grouping), and the second row is preceded by an 'F' (for-each row). The grid content is as follows:

G	EXT_ORG_I	DESCR	DESCR50
F	EXT_ORG_I	DESCR	DESCR50

Buttons for 'OK', 'Close', and 'Help' are visible at the bottom of the dialog.

- o. Click OK. You are returned to Word where the following grid is now available.
 - i. Note that the DESCR field is preceded by a "G" which designates the "grouping."
 - ii. Also see that there is an "F" before the other two fields of EXT_ORG_ID and DESCR50; this indicates that there is a looping "for-each" row.
 - iii. And last, notice that there is an "E" after the inner table of EXT_ORG_ID and DESCR50 and another "E" after the entire set of fields. "E" stands for "end."

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Descr	Descr	
G DESCR	Ext Org Id	Descr50
	F EXT_ORG_ID	DESCR50 E
	E	

p. Use Word features and select the G DESCR field and cut and paste above the table.

G DESCR

Descr	Descr	
	Ext Org Id	Descr50
	F EXT_ORG_ID	DESCR50 E
	E	

q. Select the inner table and control character E (as shown).

G DESCR

Descr	Descr	
	Ext Org Id	Descr50
	F EXT_ORG_ID	DESCR50 E
	E	

r. Cut and paste the selected area a few lines below the outer table.

G DESCR


Descr	Descr

Ext Org Id	Descr50
F EXT_ORG_ID	DESCR50 E
E	

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- s. Delete the outer table (the empty table with the Descr labels) as follows: Rest the pointer over the table until the table move handle  appears, and then click the table move handle. Press BACKSPACE. The outer table should disappear.
- t. The grid now appears as follows:

G DESCR

Ext Org Id	Descr50
F EXT_ORG_ID	DESCR50 E

E

- u. Make some formatting changes in **Word**.
 - i. At the top of the page, enter a title: Listing of OIS Approved Institutions by Country
 - ii. Delete one row between G DESCR and the grid
 - iii. Change the width of the columns
 - iv. Change the titles of the columns as follows:
 - 1. Ext Org ID – change to Organization ID
 - 2. Descr50 – change to Institution Name

Listing of OIS Approved Institutions by Country

G DESCR

Organization ID	Institution Name
F EXT_ORG_ID	DESCR50 E

E

- v. Note regarding **page breaks**: If you want to insert a page break while working in a template, the break needs to be placed before both of the “E” codes. For example, in this instance:
 - i. Move the location of the “E” which is currently after “DESCR50 to a position before the last “E”
 - ii. Place the cursor before the two codes, and press the CTRL-Break key combination.
 - iii. To verify that a page break has been entered, you can click on **Paragraph** in the **Word** menu.
- w. Save the **template** as **First SampleTemplate.rtf**. If you perform the next step without saving the template, you will receive instructions to do so.

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- x. Preview its appearance by clicking on **Add-Ins > Preview**, then **PDF**. It will display fake data. This copy is not the actual template.
- y. Note: If at any time you click on **Preview** and do not receive output that appears to be related to the original query, click **Data – Load XML Data** to load in the correct XML.

Listing of OIS Approved Institutions by Country

DESCR sample data

Organization ID	Institution Name
EXT_ORG_ID	DESCR50 sample data
EXT_ORG_ID	DESCR50 sample data
EXT_ORG_ID	DESCR50 sample data
EXT_ORG_ID	DESCR50 sample data
EXT_ORG_ID	DESCR50 sample data
EXT_ORG_ID	DESCR50 sample data
EXT_ORG_ID	DESCR50 sample data
EXT_ORG_ID	DESCR50 sample data
EXT_ORG_ID	DESCR50 sample data
EXT_ORG_ID	DESCR50 sample data

4. Set Up Report Definition (Reporting Tools > BI Publisher > Report Definition)

- a. **Report Definitions** associate a **Data Source** with **Template** files. The extracted fields from the Data Source files are placed into the Template files to create the final report.
 - i. A report can include multiple templates. A template is used to associate different layout formats as required by different countries and regions or as required by different channels (web posting, printer, fax, and so on).
 - ii. The defined output options from the report definition are reflected on the output type and format prompts on the Process Scheduler request page when the application process that runs the report is assigned the process type of BI Publisher. Security settings for a report definition determine who can view the report when it has been run.
 - iii. Report properties can be set to control formatting of the report.
 - iv. As indicated above, Report Definition access is based on user permission list security and roles.

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b. Open Report Definition

Report Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

*Search by: Report Name begins with

Include History Correct History

[Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

- Click on the **Add a New Value** link. When the next page opens, enter a **Report Name**. Note that there is a 12-character limit.
- The **Data Source Type *** is grayed out for Power Users.

Report Developer *	Power User
<p>Report Definition</p> <p>Find an Existing Value Add a New Value</p> <p>Report Name: <input type="text"/></p> <p>*Data Source Type: PS Query <input type="button" value="v"/></p> <p>Data Source ID: <input type="text"/> <input type="button" value="q"/> <input type="checkbox"/> Private Query</p> <p><input type="button" value="Add"/></p> <p>Find an Existing Value Add a New Value</p>	<p>Report Definition</p> <p>Find an Existing Value Add a New Value</p> <p>Report Name: <input type="text"/></p> <p>*Data Source Type: PS Query <input type="button" value="v"/></p> <p>Data Source ID: <input type="text"/> <input type="button" value="q"/> <input type="checkbox"/> Private Query</p> <p><input type="button" value="Add"/></p> <p>Find an Existing Value Add a New Value</p>

- In the **Data Source ID** dropdown box you can search for the query by typing in all or the first few letters of the query name. If you do not type in the entire name, a list of queries will be displayed.

Data Source

[Find an Existing Value](#) | [Add a New Value](#)

Data Source Type: PS Query

*Data Source ID: WOIS_EXT_ORGS_NRS_INTL_ONLY Private Data Source

[Find an Existing Value](#) | [Add a New Value](#)

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- d. Click the Add button. The following group of pages will appear (Note: The Power User will not have the **Bursting** page).

The screenshot shows the 'Report Definition' page in PeopleSoft BI Publisher. The breadcrumb trail is 'Favorites > Main Menu > Reporting Tools > BI Publisher > Report Definition'. The page has several tabs: 'Definition', 'Template', 'Output', 'Properties', 'Security', and 'Bursting'. The 'Definition' tab is active. The report name is 'OIS_APPROVE2'. Under the 'Data Source' section, the type is 'PS Query', the ID is 'WOIS_EXT_ORGS_NRS_INTL_VER2', and the description is 'Active OIS Orgs INTL Only'. Under 'Report Properties', the report description is 'OIS Approved International V2', the status is 'Active', the category ID is 'CATEGORY 3' (with a search icon and 'Developer Only' text), the owner ID is 'PeopleTools', and the template type is 'RTF'. There are fields for 'Retention Days', 'Registered Date/Time', 'Registered By', 'Updated Date/Time', and 'Updated By'. At the bottom, there are links for 'Data Schema' and 'Sample Data', and buttons for 'Add', 'Update/Display', 'Include History', 'Correct History', and 'Save'.

- e. Start with the **Definition** page by entering a name for the report in **Report Description**.
- f. Under **Report Status**, change **In Progress** to **Active**.
- g. Under **Report Category ID**, select an appropriate Report Category.
- h. Set the **Template Type** as RTF if it is not already.
- i. The **Definition** page should now appear as above.

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- j. Click on the **Template** tab. Notice that the Report Name is displayed at the top. There is now a **Template ID** that begins with the Report Name and ends in “_1.” You’ll see that you can add other templates based on this Report Name by using the Plus buttons to the right. Successive Template ID numbers will end in “_2,” etc.

Definition | **Template** | Output | Properties | Security | Bursting

Report Name: OIS_APPROVE2

Template Find | View All First 1 of 1 Last

*Template ID: OIS_APPROVE2_1 Default Template + -

Description

*Language Code: English Channel

Template Files Find | View All First 1 of 1 Last

*Effective Date: 11/25/2015 Use Data Transform

*Status: In Progress Use Alt. XML

Template File Upload Preview

Add Update/Display Include History Correct History

Save

- k. In order to save the **Report Definition**, you must associate a **Template** with it.
- On the **Template** page, upload the RTF template by clicking on the Upload button (**Note:** In Internet Explorer, you may need to hold down the CTRL key at the same time).
 - Depending on your browser, a dialog will appear prompting you to browse for the file.
 - Click on the yellow Upload button to browse for and upload the template file that you recently saved.

File Attachment Help

Q:\SFIS Operations\BI PUBLISHER\BI PUBLISHER - v Browse...

Upload Cancel

- l. Once you have uploaded the template, you will see its name listed next to the label **Template File** at the bottom of the page, in the **Template Files** section.
- You can create more than one Template by clicking on the plus sign in the first part of the page. Different Templates can have the same date.

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- ii. **Template Files**, however, cannot have the same date. (If you are editing and testing a template, you can do so one of two ways: Add a new Template or add a new **Template File** by making Effective Date, under **Template Files**, a date prior to today. This will enable you to create a number of **Template Files** at one time if necessary.)

- m. Change the **Status** from **In Progress** to **Active**.

*Status: Active Use Data Transform

Template File: OIS_APPROVE2.rtf Use Alt. XML

- n. Click on the **Output** tab.

Report Name: OIS_APPROVE2

Format Type	Enabled	Default
HTML	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PDF	<input checked="" type="checkbox"/>	<input type="checkbox"/>
RTF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
XLS	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Output Location

*Location: Any

- o. Select **RTF** as the **Default**.
- p. Save the **Report Definition** by clicking on the **Save** button in the lower left

5. Run, View and Save BI Publisher Report (Reporting Tools > BI Publisher > Query Report Viewer)

Below are two methods for running, viewing and saving the BI Publisher Report: (a) **Query Report Viewer** and (b) **Query Report Scheduler**

- a. On the **Query Report Viewer** page, click the **Search** button
 - i. If there were more than one Template associated with the Report Name, you would click on the Show Template Prompts link to view them all. In this case there is just one template, and the correct format, RTF is displayed. Click on **View Report**.

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Favorites Main Menu > Reporting Tools > BI Publisher > Query Report Viewer

Query Report Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by: Report Name begins with OIS_APPROVE2

Search Advanced Search

Search Results

Show Template Prompts

Report Name	Description	Data Source ID	*Format	Burst	View Report
OIS_APPROVE2	OIS Approved International V2	WOIS_EXT_ORGS_NRS_INTL_VER2	RTF	N	View Report

ii. The RTF file opens, and the first page appears as follows:

Listing of OIS Approved Institutions by Country

Argentina

Organization ID	Institution Name
500071	CIEE: Buenos Aires, Argentina

Australia

Organization ID	Institution Name
500018	Australian National University - NRS
500094	James Cook University - NRS
500125	Murdoch University - NRS
0500510	SFS Australia: Rainforest Management
500252	SIT Australia: Rainforest
500203	University of Adelaide - NRS
500213	University of Melbourne - NRS
500216	University of Queensland - NRS
500221	University of Sydney - NRS
500222	University of Tasmania - NRS
500225	University of Western Australia - NRS

Brazil

Organization ID	Institution Name
534913	Brown in Brazil
555937	CIEE: Salvador da Bahia
500154	CIEE: São Paulo

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- iii. This shows the beginning of a 13-page report that has the institutions sorted and grouped by Country, and then alphabetically by name.
 - iv. There are no page breaks in this report as shown here.
 1. At any time you can go back into the template and make formatting or other changes.
 2. If you do, you will need to upload the template again in Report Definition to have the latest version associated.
 - v. You may save a copy of the report by doing a Save As an RTF file. You can use it as an RTF file or save the RTF file as a Word document.
- b. **Query Report Scheduler** (Reporting Tools > BI Publisher > Query Report Scheduler)

Query Report Scheduler

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Search by: Run Control ID begins with

Case Sensitive

[Search](#) [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

- i. Create a new **Run Control**. The following page opens.

Query Report Scheduler

Run Control ID: ois_test [Report Manager](#) [Process Monitor](#) [Run](#)

Language: English

Report Definition

Data Source Type: Query

Report Name:

Template ID:

Template As Of Date: Channel:

[Go to RIP Report Search](#)

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

- ii. Populate the fields as follows:
 - a) **Data Source Type**: The default should be **Query**. If it is not, change it to Query.

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- b) **Report Name:** You can search for or enter the entire name.
 - c) **Template ID:** If there is just one Template, this field will fill in automatically based on the Report Name. If there is more than one Template, you will choose from the dropdown.
 - d) **Template As Of Date:** To be filled in if the date is a factor.
 - e) Note that, if you entered a Channel earlier, the Channel is prepopulated with that entry.
- iii. Click on **Save** to save this **Run Control**
 - iv. Click on **Run**

Query Report Scheduler

Run Control ID: ois_test [Report Manager](#) [Process Monitor](#)

Language: English

Report Definition

Data Source Type: Query

Report Name: OIS Approved International V2

Template ID:

Template As Of Date: Channel: Printer

[Go to BIP Report Search](#)

- v. Click on OK and then on **Process Monitor**. Basically, run this as you would any Process Scheduler process.
- vi. Once the **Run Status** is at **Success** and **Distribution Status** is at **Posted**, click on the link **Go back to Query Report Scheduler**.

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- vii.
- viii. Click on the Report Manager link. You will see the following:

The screenshot shows the Report Manager interface with the following elements:

- Navigation tabs: List, Explorer, Administration, Archives
- View Reports For section:
 - Folder: [dropdown]
 - Instance: [input] to: [input] Refresh
 - Name: [input] Created On: [input] Last [dropdown] 1 Days [dropdown]
- Reports table:

Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1 OIS_APPROVE2 - OIS_APPROVE2.rtf	OIS_APPROVE2 - OIS_APPROVE2.RTF	General	11/25/15 2:00PM	713943	601881

- viii. Click on the **Report** link (**OIS_APPROVE2 – OIS_APPROVE2.rtf**). When the next page opens, click on the **Name** link (**OIS_APPROVE2.rtf**)

The screenshot shows the details for the report 'OIS_APPROVE2 - OIS_APPROVE2.rtf':

- Report**
 - Report ID: 713943 Process Instance: 601881 [Message Log](#)
 - Name: XMLP Process Type: XML Publisher
 - Run Status: Success
- Distribution Details**
 - Distribution Node: RPTDIST Expiration Date: 05/23/2016
- File List**

Name	File Size (bytes)	Datetime Created
OIS_APPROVE2.rtf	183,790	11/25/2015 2:00:35.991578PM EST
- Distribute To**

Distribution ID Type	*Distribution ID
User	CPIKE01

- ix. You will be prompted to save the RTF file.

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- x. The beginning of the first page appears as shown.

Listing of OIS Approved Institutions by Country

Argentina

Organization ID	Institution Name
500071	CIEE: Buenos Aires, Argentina

Australia

Organization ID	Institution Name
500018	Australian National University - NRS
500094	James Cook University - NRS
500125	Murdoch University - NRS
0500510	SFS Australia: Rainforest Management
500252	SIT Australia: Rainforest
500203	University of Adelaide - NRS
500213	University of Melbourne - NRS
500216	University of Queensland - NRS
500221	University of Sydney - NRS
500222	University of Tasmania - NRS
500225	University of Western Australia - NRS

- xi. As mentioned above, you can edit, format or make any changes to the RTF template. After you do so, you will need to upload the template again into Report Definition.

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Appendix A – Chart displaying access for Report Developer and Power User

	<i>XMLP Report Developer (PTPT2600)</i>	XMLP Power User (PTPT2500)
Report Category	Yes	No
Design Helper	Yes	Yes
Data Source	Yes	No
Report Definition	Yes	Yes Note. Display Only access for bursting.
Content Library	Yes	Yes
Template Translations	Yes	No
Query Report Viewer	Yes	Yes
Query Report Scheduler	Yes	Yes
Report Repository	Yes	Yes

Appendix B – Links to Other Documentation

- In the [SFIS Blog](#), look for documentation on these pages:
 - [BI Publisher/ XMLP](#)
 - [BIP Templates](#)
 - [BIP – Fields, Tables and Forms](#)
 - [BIP – Formatting](#)
 - [LISTS OF LINKS](#)

- Also, while working in PeopleSoft, check the Help link for documentation in PeopleBooks.