

BI Publisher Tutorial

Lesson 1 – Create, Format and View a Simple Report Using Sample Data

- *This tutorial assumes that you...*
 - *have security to create Data Sources*
 - *are familiar with creating queries*
 - *have downloaded the BI Publisher Design Helper*
 - *are acquainted with running Reports in PeopleSoft.*

IMPORTANT: You must use the **SFIS TEST Database** to complete this exercise. The PeopleSoft elements (e.g. Data Source and Report Definition) must not be created in Production, **only in TEST**. **Click here to open the page containing the link to the SFIS TEST LOGIN:** [SFIS QUICK LINKS/ LOGIN](#)

Outline

The major steps of the BI Publisher process fall into these general areas: **Design Time** and **Run Time** as shown here. As indicated, the steps having to do with the **Template** are performed **Offline**, that is, with no connection to PeopleSoft.

- 1. Design: Data Source**
 - [Mock Up Report \(Offline\)](#)
 - [Create or Identify Data Source – PeopleSoft Query](#)
 - [Register Data Source with BI Publisher](#)
- 2. Design: Template and Report**
 - [Download Sample Data \(XML File\)](#)
 - [Create BI Publisher Report Template \(Offline\)](#) – **After** downloading the BI Publisher Design Helper
 - [Preview and Tweak until Complete \(Offline\)](#)
 - [Set up Report Definition – Associate Data Source and Template](#)
- 3. Run Time: Request and View**
 - [Publish BI Publisher Report](#)
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1a Design: Data Source – Mock Up Report (Offline)

- This step in the process can occur before the bulk of the work is done, or it can follow the creation of the query, or it can even be done as the template is being formulated.
- The mockup can be derived from an existing document such as a report or piece of correspondence.
- Once a template has been finalized it can be copied, altered and adapted for use with the same query or a similar query.
- The report being created through this tutorial is a document listing Countries using the data you will see on the SFIS Blog Page [BI Publisher/ XMLP](#) named [BI Publisher Template Example](#)

1b Design: Data Source – Create or Identify Data Source – PeopleSoft Query

- **PEOPLESOFT TEST:** Create a new query in the [SFIS PeopleSoft TEST Database](#)
- The Record Name is COUNTRY_TBL
- Select these fields: COUNTRY, DESCR, COUNTRY_2CHAR, and EU_MEMBER_STATE
- Add Criteria: COUNTRY_2CHAR greater than 0
- Add this expression. (This SUBSTR (substring) expression extracts a portion of a string or field. In this case, it is the first letter of the name of each country in the DESCR field.)

The screenshot shows a dialog box titled "Edit Expression Properties". It has a dropdown menu for "Expression Type" set to "Character" and a "Length" field set to "1". There is an unchecked checkbox for "Aggregate Function" and a "Decimals" field. The "Expression Text" field contains the text "SUBSTR(A.DESCR,1,1)". Below the text field are two buttons: "Add Prompt" and "Add Field". At the bottom of the dialog are "OK" and "Cancel" buttons.

- Click **OK** and click to utilize the expression as a field (**Use as Field**).
- Change the **Heading Text** to Letter
- Order by the **DESCR** field

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- Change the column sequence as shown in the final report
- The **Fields** page should look like this:

Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text
1	SUBSTR(A.DESCR,1,1)	Char1				Letter
2	A.DESCR - Description	Char30	1			Descr
3	A.COUNTRY - Country	Char3				Country
4	A.COUNTRY_2CHAR - 2-Char Country Code	Char2				2-Char Cd
5	A.EU_MEMBER_STATE - EU Member State	Char1				EU

- The first few rows should look like this:

	Letter	Descr	Country	2-Char Cd	EU
1	A	Afghanistan	AFG	AF	N
2	A	Aland Islands	ALA	AX	N
3	A	Albania	ALB	AL	N
4	A	Algeria	DZA	DZ	N

- **Save** the query as a private query. Next you will define the query as your Data Source, i.e., the means by which the data is extracted from PeopleSoft.

1c Register Data Source with BI Publisher

- Navigate to the Data Source page: **Reporting Tools > BI Publisher > Data Source**
- Since there is no existing Data Source, click on **Add a New Value**
- 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:

***Data Source ID:** Private Data Source

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

- 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 exercise, the query is: **WES_SFIS_TRAIN_COUNTRY_FORMAT1**

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Data Source

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

Data Source Type:

***Data Source ID:** **Private Data Source**

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

- To the right is a checkbox labeled **Private Data Source**. This will be checked if you saved the Data Source as a Private Query.
- Once you have typed the query name, click the **Add** button. The Data Source page will appear as follows:

Data Source

Data Source Type PS Query (Private)
Data Source ID WES_SFIS_TRAIN_COUNTRY_FORMAT1

Data Source Properties

Description **Active**

Owner ID

Registered Date/Time

Registered By

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		

- **Description:** (Optional) Enter descriptive text that provides more detail about the data source. Otherwise, the description automatically defaults to the Data Source ID when you click Save.
- **Owner ID:** (Optional) Indicate which product, feature, or application owns this data source.
- **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.

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- **Last Update Date/Time:** This is a read-only field that indicates the date that the last update to the data source was made.
- **Active:** If not already checked, select to indicate that this is an *active data source*.
 - Only active data sources can be chosen when creating a new Report Definition.
 - Only reports with active data sources can be processed.
- **Registered By:** This is a read-only field that indicates the user ID of the operator who initially registered the data source.
- **Updated By:** This is a read-only field that indicates the user ID of the operator who last updated the data source.
- Generate the Sample Data File and Schema File:
 - Click **Generate** under the **Generate File** column for **Sample Data File (XML file)**.
 - Click **Generate** under the **Generate File** column for **Schema File**.
- After the **Data Source** is generated, an XML file is created.
- Click the **Save** button.
- The **Data Source** page now appears as follows:

Data Source

Data Source Type PS Query (Private)
Data Source ID WES_SFIS_TRAIN_COUNTRY_FORMAT1

Data Source Properties

Description WES_SFIS_TRAIN_COUNTRY_FORMAT1 Active
Owner ID
Registered Date/Time
Registered By
Last Update Date/Time
Updated By

Related Files

File Type	File	Generate File	Or	Upload File
Sample Data File	WES_SFIS_TRAIN_COUNTRY_FORMAT1.XML	Regenerate	Or	Upload
Schema File	WES_SFIS_TRAIN_COUNTRY_FORMAT1.XSD	Regenerate		

Add Update/Display

Save

- **Note:** You will see that in the Generate File column the link names have changed from **Generate** to **Regenerate**. If you make changes to the underlying query at a later point, you will need to return here to regenerate the Data Source (and save the XML file again as shown in the next section).

2a Download Sample Data (XML File)

- Once you have registered the query as your **Data Source**, you need to save the **Sample Data File** so you can utilize it to create the **BI Publisher Template**. The Sample Data File, as you can see, has an extension of **XML**. This XML file will provide you with placeholders to work out the formatting and other details of the template.

Oracle Definition of Sample Data File:

The **sample data file** is an XML file with sample data that is used for data mapping, template preview, and determining burst fields. Preview action is available within a desktop template designer or from within the report definition page. For PS Query and Connected Query data source types the sample data file can be system-generated or uploaded. For XML file data source type, the sample data file must be uploaded.

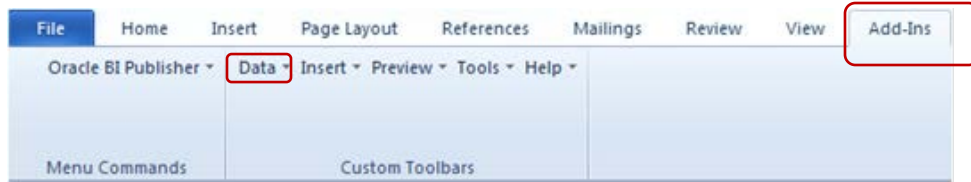
- To view the XML File, click on the link containing the name of the file.
 - The browser appears and displays the XML file data. You do not need to do anything with this file except to save it.
 - **Save the XML file in an appropriate directory.** You will be accessing the XML file when you create the Word template.
 - Below is the appearance of the beginning of the XML file. Once you have saved the file, you can close it.

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

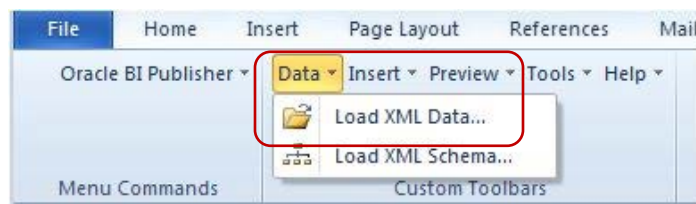
```
-<query numRows="10" queryname="WES_SFIS_TRAIN_COUNTRY_FORMAT1" xsi:noNamespaceSchemaLocation="">
- <row rownumber="1">
  <EXPR5_5>E</EXPR5_5>
  <DESCR>DESCR sample data</DESCR>
  <COUNTRY>COU</COUNTRY>
  <COUNTRY_2CHAR>CO</COUNTRY_2CHAR>
  <EU_MEMBER_STATE>E</EU_MEMBER_STATE>
</row>
- <row rownumber="2">
  <EXPR5_5>E</EXPR5_5>
  <DESCR>DESCR sample data</DESCR>
  <COUNTRY>COU</COUNTRY>
  <COUNTRY_2CHAR>CO</COUNTRY_2CHAR>
  <EU_MEMBER_STATE>E</EU_MEMBER_STATE>
</row>
```

2b Create BI Publisher Report Template (Offline)

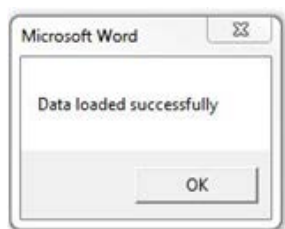
- Once the Sample Data (XML file) has been saved, open MS Word.
 - If you wish, you can save the document at this point as an RTF file, or you can wait until later. *Note that you must save the file before you can run **Preview**.*
- Select **Add-Ins** from the menu.



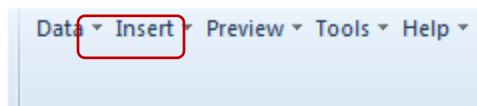
- To gain access to the data in the XML File, click on the **Data** menu and select **Load XML Data**



- Windows Explorer opens.
- Navigate to the directory where you saved the XML file
- Click to open the file. In this example, it is WES_SFIS_TRAIN_COUNTRY_tutorial 1.xml.
- When this message appears, click OK



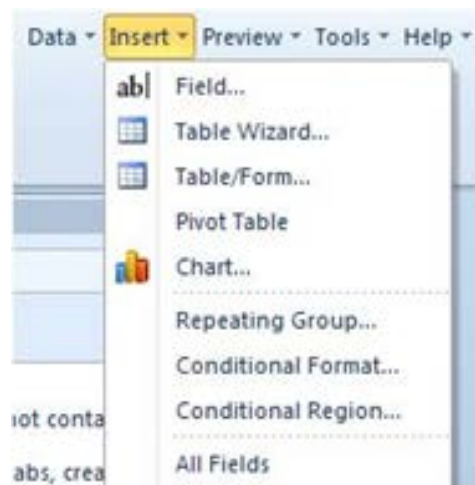
- **Tip:** Before you insert the fields, you can start to format the overall dimensions of the page. For example, set your margins and line spacing and put in a few blank lines at the top of the page. In this example, the margins are 0.5" on either side and the document is single spaced.
- To begin inserting the fields and formatting the template, click on **Insert**.



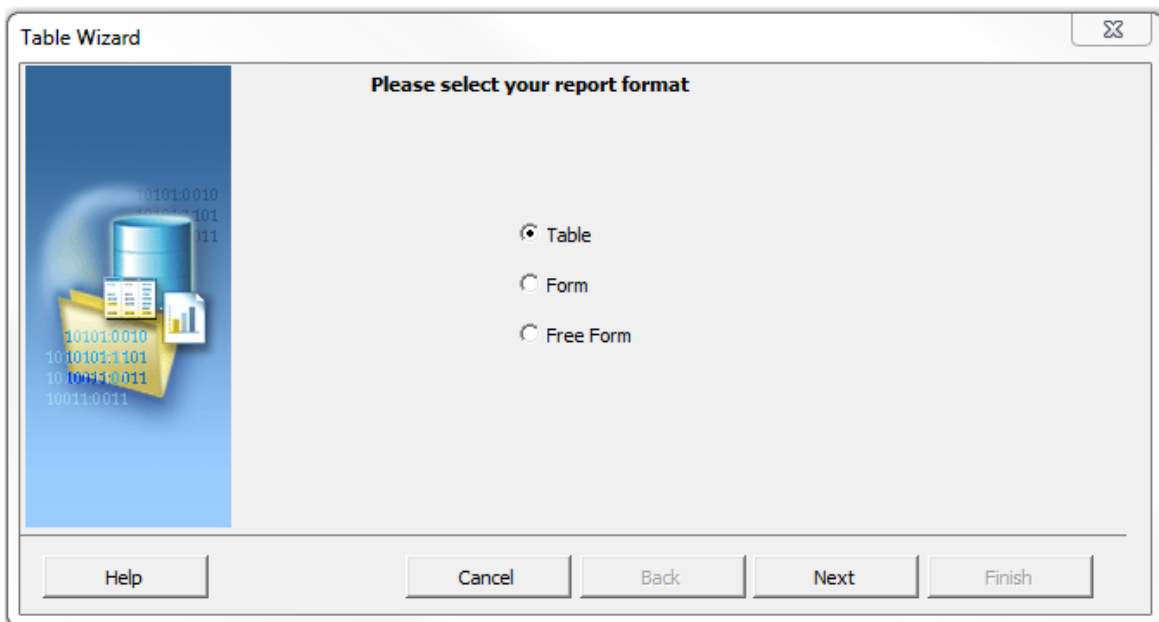
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- The **Insert** menu appears as follows:



- There are a number of methods for inserting the fields into the Word template. The easiest way to initially display all rows of data is to use the **Table Wizard**, which is the method that will be demonstrated here.
- Place your cursor on the page where you would like to locate the beginning of the table. Click on **Table Wizard...** The following page opens – “**Please select your report format.**”

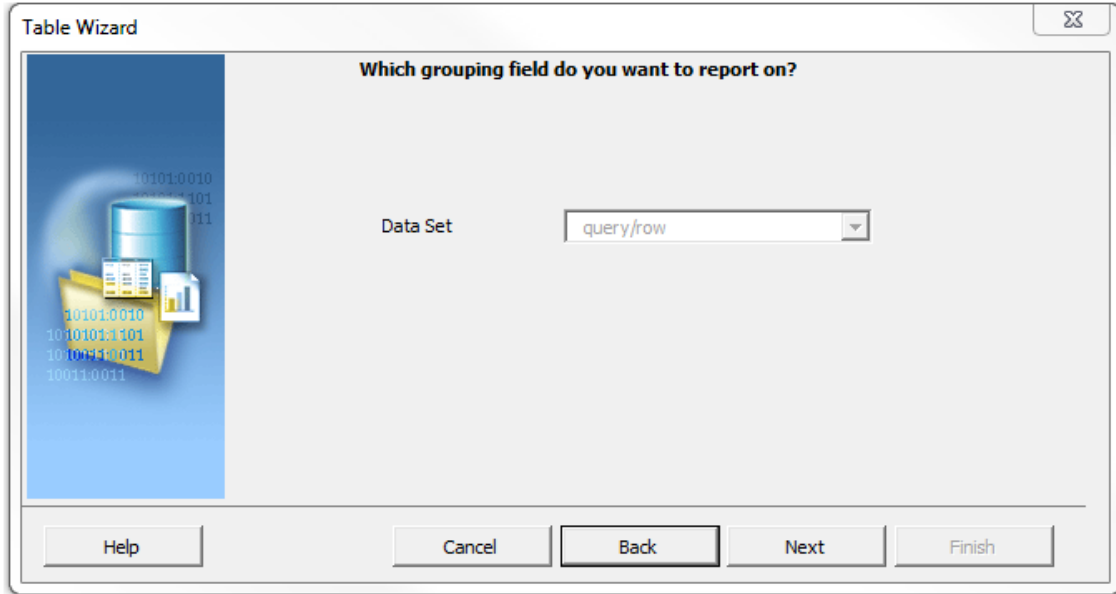


- You will be creating a **Table**, so accept that default by clicking **Next**.

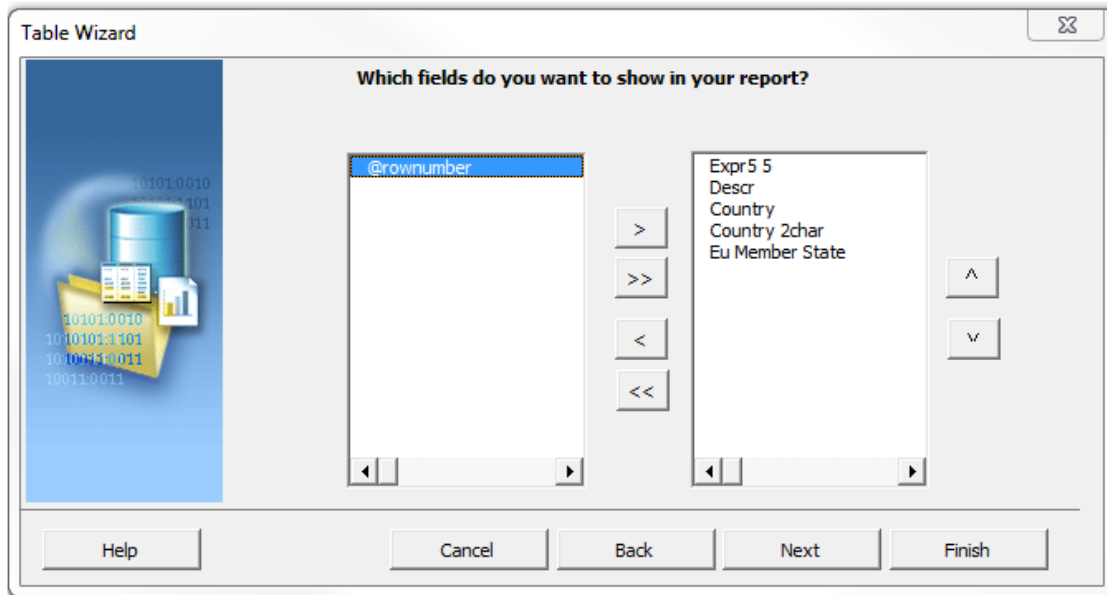
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- **“Which grouping field do you want to report on?”** This page opens with a dropdown box for the **Data Set**. An XML document can contain many data sets. This file only contains one, so you can click **Next** again. (You can read more about Data Sets by clicking on the **Help** button.)



- Drag over the five query fields so the page look like this:



- Note that the Expression field has a name of **Expr5 5**. If there were a number of expression fields in your query, it would be a good idea to give them more easily identifiable names *while still in Query*. This would make them simpler to work with in the template. However, since there is just one expression field here, that is not necessary.

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- Click **Next**.
- The following page opens –“**How would you like to group your report?**”
 - First, since you want to have the letter of the alphabet placed above each corresponding group of names, select the field name **Expr5 5** from the dropdown box and leave the default, **Group above**.
 - Second, you can indicate that the data is already sorted.
 - The **Break** field allows you three options: No Break, Page, or Section.
 - For this example, the default of No Break is left as is.

Table Wizard

How would you like to group your report?

Group By

Then By

Then By

Then By

Group above

Group left

Data already sorted

Break: No Break

Group above

Group left

Data already sorted

Break: No Break

Group above

Group left

Data already sorted

Break: No Break

Group above

Group left

Data already sorted

Break: No Break

Help Cancel Back Next Finish

- After you make the entries , the page appears as shown here:

Table Wizard

How would you like to group your report?

Group By

Then By

Then By

Then By

Expr5 5

Group above

Group left

Data already sorted

Break: No Break

Group above

Group left

Data already sorted

Break: No Break

Group above

Group left

Data already sorted

Break: No Break

Group above

Group left

Data already sorted

Break: No Break

Help Cancel Back Next Finish

- Click **Next**. On the following page – “**Which fields would you like to use to sort the data?**” - you can further define the sorting of the other fields in the table. Select **Descr – Ascending**.

The screenshot shows the 'Table Wizard' dialog box with the title 'Which fields would you like to use to sort the data?'. On the left is a graphic of a database cylinder and folders. The main area contains four 'Then By' sections. The first section has 'Sort By' set to 'Descr' and 'Ascending' selected. The other three sections have empty dropdowns and 'Ascending' selected. Each section has radio buttons for 'Date/Text' and 'Number', with 'Date/Text' selected in all. At the bottom are buttons for 'Help', 'Cancel', 'Back', 'Next', and 'Finish'.

- Click **Next**.
- You have the opportunity to change the field labels on the last page, “**How do you want to label the fields?**” Note that if you do not do it now you can make those changes at any time. Make the changes as follows:

The screenshot shows the 'Table Wizard' dialog box with the title 'How do you want to label the fields?'. On the left is the same database graphic. The main area contains a table with two columns: 'Field' and 'Label'. The table lists four fields and their corresponding labels. At the bottom are buttons for 'Help', 'Cancel', 'Back', 'Next', and 'Finish'.

Field	Label
Descr	Descr
Country	3 Char. Code
Country 2char	2 Char. Code
Eu Member State	EU Member State

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- You'll see there's no change for the **Descr** field label. This is because that label is going to be removed from the template. Click **Finish**.
- The table template opens:

group row by EXPR5_5

EXPR5_5

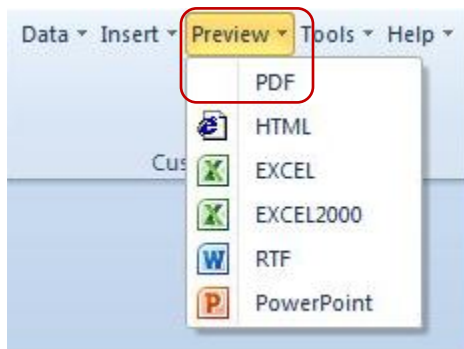
Descr	3 Char. Code	2 Char. Code	EU Member State
F DESCR	COUNTRY	COUNTRY_2CHAR	EU_MEMBER_STATE E

end row by EXPR5_5

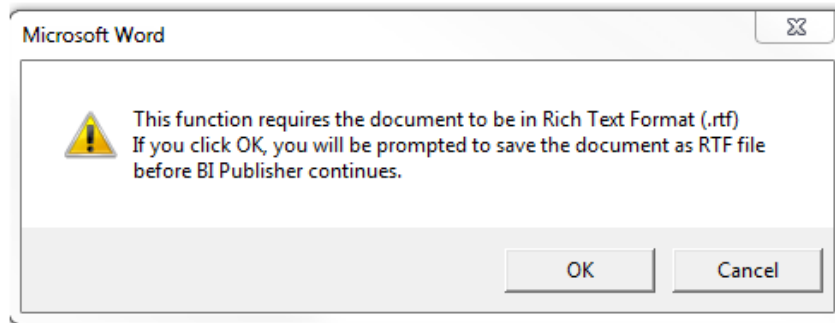
- This is a brief explanation of the codes you see that have been added through the **Table Wizard**:
 - **group row by EXPR5_5** – indicates the beginning of the grouping as well as the order
 - **F** - “for-each” code to designate the **start of each row** (before the first field in the row, DESCR) as well as the order
 - **E** – (after the last field in the row, EU_MEMBER_STATE) at the **end of each row**, to indicate the row is closed
 - **end row by EXPR5_5** – designates the end of each grouping
 - The technical information that underlies the code can be seen by double-clicking on the phrase or letter.

2c Preview and Tweak Until Complete (Offline)

- At this point, it's a good idea to run a preview to get an idea of how this report will look. (This is something you should do on a regular basis as you refine your template.)
- Click on **Add-Ins** and then the **Preview** menu. You will be viewing the preview as a PDF file, so select **PDF**.



- If you have not already saved the file as an RTF, the first time you choose to run a **Preview**, you will receive this message:



- Click **OK**. And you will be taken to Windows Explorer where you can save the document as an **RTF** file. In this example the file is named **BI Tutorial Country 1.rtf**. This is the file that will ultimately be your final report.
- You can now run the **PDF Preview** which will appear similar to the following:

E

Descr	3 Char. Code	2 Char. Code	EU Member State
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E

- Since the XML file is sample data, until you **associate** the **Template** with the **Report Definition**, it will appear as shown here. In **Lesson 2**, when you have a clearer understanding of how the BI Publisher process works from beginning to end, you will be introduced to an advanced method that places **real data** on the template you are editing.
- You can begin formatting the table by changing the width of each column. Starting with the last column, make all except the first column narrower.
- Delete the “DESCR” **label** (*not* the DESCR field) from the blue label box.
- Move the **EXPR5_5** field into the blue label cell.
 - Note: Since the cell you are placing the EXPR5_5 field into is a label cell, the EXPR5_5 field is still above and outside of the row.
- Using MS Word tools, change the font type and size of the **EXPR5_5** field and make it bold. In this example, it is set at Times New Roman, Bold, 14. The template should look like this:

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group row by EXPR5_5

EXPR5_5	3 Char. Code	2 Char. Code	EU Member State
F DESCR	COUNTRY	COUNTRY_2CHAR	EU_MEMBER_STATE E

end row by EXPR5_5

- Run **Preview**, and the preview should look like this:

E	3 Char. Code	2 Char. Code	EU Member State
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E

- If you're satisfied with its appearance so far, you can save the RTF file at this point.
- Change the background color of the labels to light gray by using MS Word processes.
- Using MS Word processes:
 - Change the text color of the **EXPR5_5** field to White.
 - Highlight the **EXPR5_5** field with Teal.
 - Change the font of the three labels to Times New Roman and center the labels over each column.
 - Add in a footer with the **file name** on the left and **Page x of x** on the right.
 - Center a heading above the table, formatting in Times New Roman, Bold, 14, Teal:

BI Publisher Template Example List of Countries with Codes EU Members Highlighted

- The upper part of the page should appear as follows:

BI Publisher Template Example
List of Countries with Codes
EU Members Highlighted

group row by EXPR5_5

EXPR5_5	3 Char. Code	2 Char. Code	EU Member State
F DESCR	COUNTRY	COUNTRY_2CHAR	EU_MEMBER_STATE
			E

end row by EXPR5_5

- The footer should be similar to this:

Footer	
BI Tutorial Country 1.rtf	Page 1 of 1

- Run **Preview**. The Preview should look similar to the following:

BI Publisher Template Example
List of Countries with Codes
EU Members Highlighted

E	3 Char. Code	2 Char. Code	EU Member State
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E

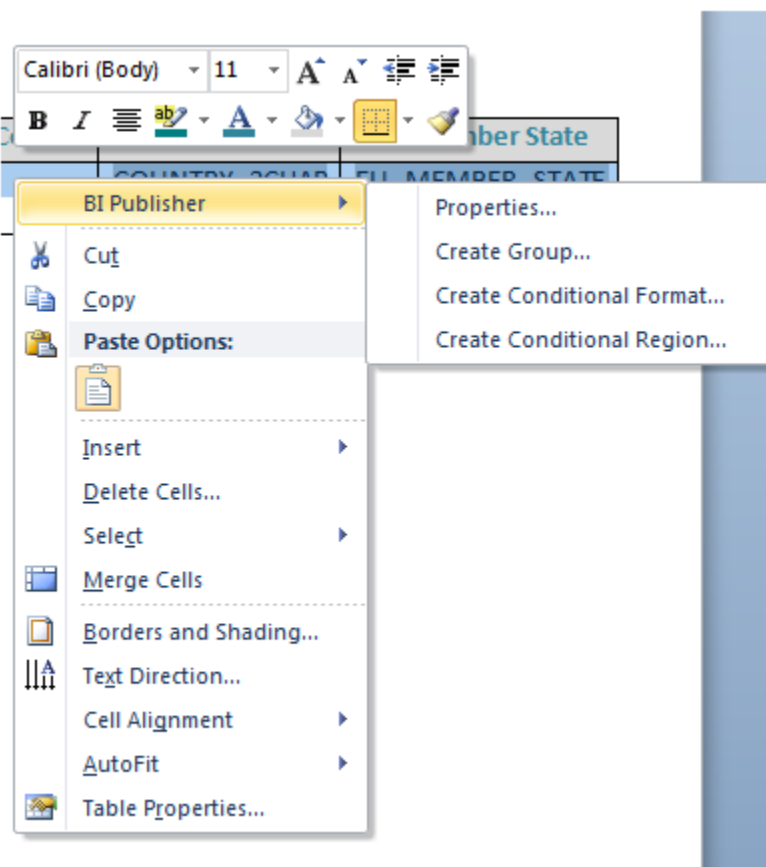
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- The next formatting task is **Conditional Formatting**, which is a **BI Publisher** process.
 - Since the data shown is sample data, you will not see the effects of the Conditional Formatting until you associate the Template with the Report Definition and run it in the **Query Report Viewer**.
 - The formatting will affect the rows that begin with DESCR and end with EU_MEMBER_STATE.
- Highlight the row of data starting with **F DESCR** and ending with **EU_MEMBER_STATE E**. Be sure you include everything shown here:

F DESCR	COUNTRY	COUNTRY_2CHAR	EU_MEMBER_STATE
---------	---------	---------------	-----------------

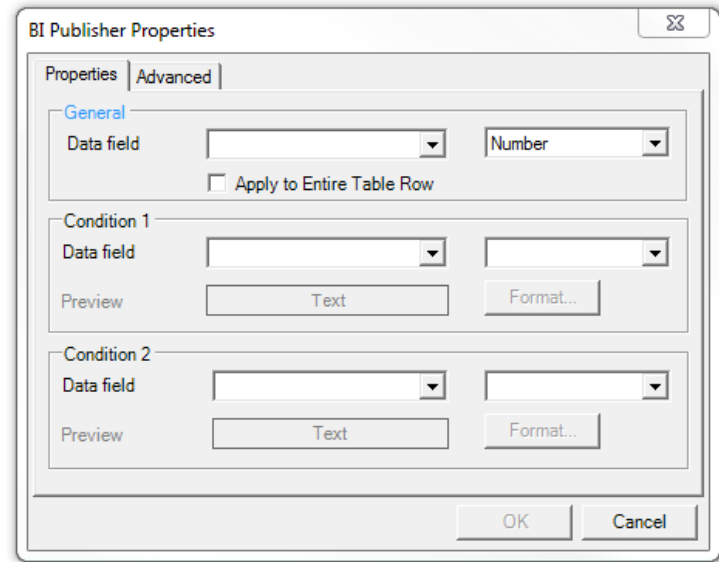
- Right click so that the following menus open. Click on **BI Publisher** at the top of the menu, and then click on **Create Conditional Format...**



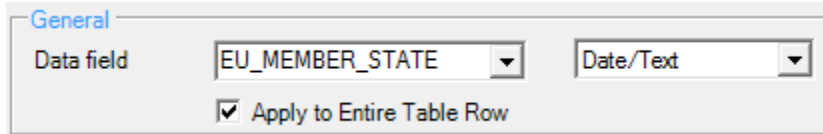
- The following menu opens:

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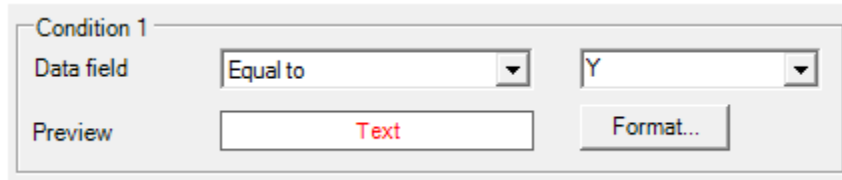
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- Under the **General** Section, In the **Data field** dropdown, select the field **EU_MEMBER_STATE**. You will recall that this is a Yes/No field and that the information contained is either a “Y” or an “N.” We will first format the rows for countries that have a “Y” in that field. This portion of the menu should appear as follows:



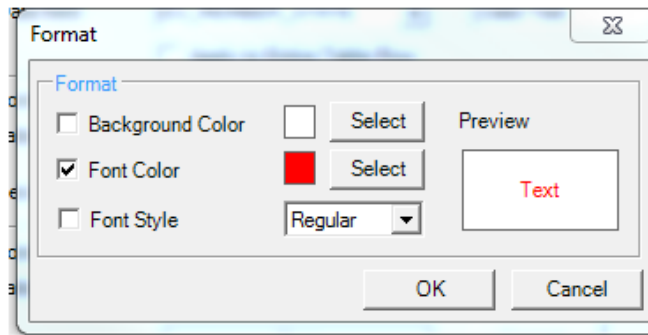
- For the right-hand field, change **Number** to **Date/Text**.
- Check the box to indicate you wish the format to **Apply to Entire Table Row**.
- In the next section, **Condition 1**, select from the **Data field** dropdown **Equal to**. The field to the right is also a dropdown box with a list of fields. You can also make an entry that is not in the list. In this case, type in “Y” (no quotes). You’ll note that when you do, the **Preview** box opens with **Text** in red on a white background, and the **Format** button is no longer grayed out.



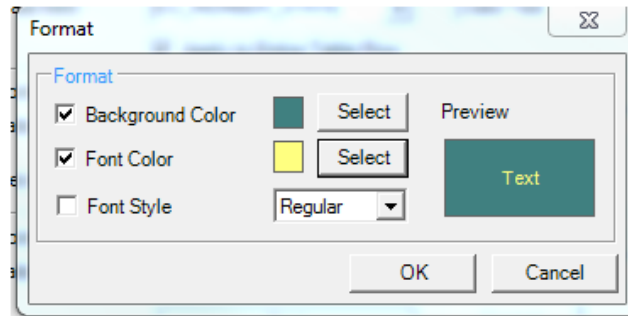
- Click on the **Format** button to open the next menu:

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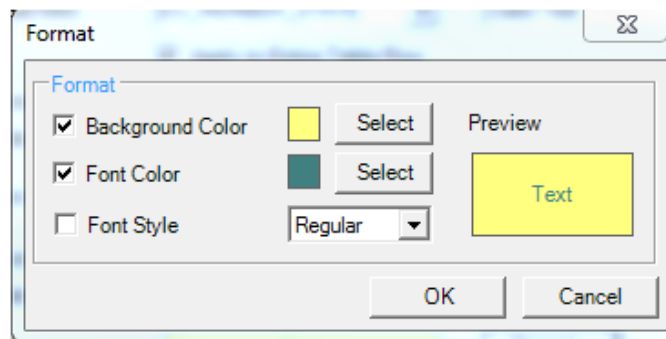
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- Check the **Background Color** box and Select Teal.
- The **Font Color** box is already checked. Select Yellow.
- Note that you can change the **Font Style** if you wish as well. The Format section for **Condition 1** should now appear as follows:

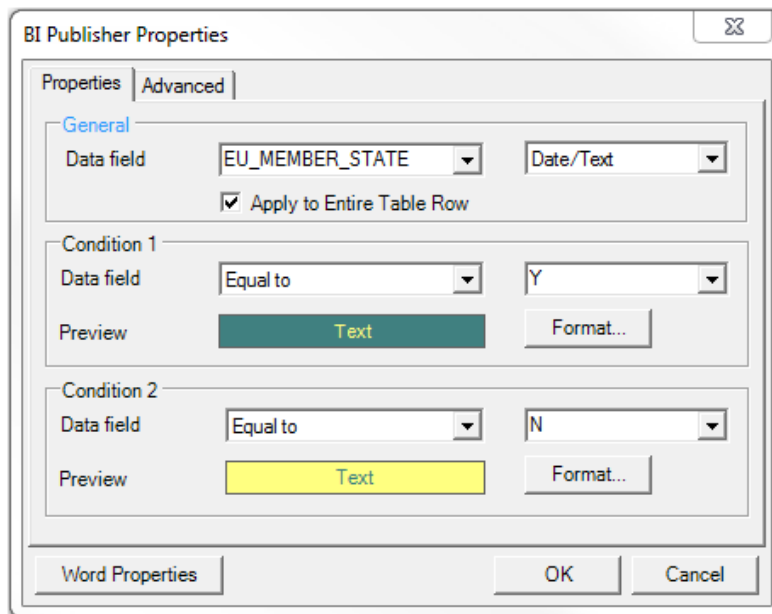


- Click **OK**.
- Under **Condition 2**, set the **Data field** equal to "N" (no quotes). And select the opposite colors:
 - For the **Format** menu, check the **Background Color** and select **Yellow**
 - For the **Font Color** select **Teal**
 - Click **OK**.
 - **Condition 2** should look like this:



- Click **OK**.

- The entire menu should appear as follows:



- Click **OK** to save these changes.
- The Template now has an addition at the front of the row, the letter **C** before the **F DESCR** indicating there is **Conditional Formatting** starting at that point for the row:

EXPRS_5	3 Char. Code	2 Char. Code	EU Member State
C F DESCR	COUNTRY	COUNTRY_2CHAR	EU_MEMBER_STATE E

- If need to edit the conditional format, you can double-click the “C” and the menu will open.
- You can run a Preview, but you will not see these changes.
 - Since this is sample data, and since this formatting is conditional, you won’t see it in effect until the Template is associated with the Report Definition, i.e., the actual live data.
- You should **Save** the **Template** at this time .

2d Set up Report Definition – Associate Data Source and Template

- In this step we relate the recently saved **Template** with the **Data Source** in **PeopleSoft**. Until this point, there is no direct connection between them.
- Begin by navigating to **Report Definition: (Reporting Tools > BI Publisher > Report Definition)**

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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** begins with

by:

Include History Correct History

[Advanced Search](#)

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

- Click on **Add a New Value**. When the next page opens, enter a **Report Name**. There is a 12-character limit.

Report Definition

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

Report Name:

*Data Source Type:

Data Source ID:

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

- **Data Source Type:** The default should be set to **PS Query**. If it is not, select **PS Query**.
- **Data Source ID:** In this 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 that you can choose from.

Report Definition

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

Report Name:

*Data Source Type:

Data Source ID:

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

- Click the **Add** button. The following group of pages will appear:

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The screenshot shows the 'Definition' tab of a report definition in PeopleSoft BI Publisher. The report name is 'WES_COUNTRY1'. The 'Data Source' section shows it is a 'PS Query (Private)' with ID 'WES_SFIS_TRAIN_COUNTRY_FORMAT1' and description 'WES_SFIS_TRAIN_COUNTRY_FORMAT1'. The 'Report Properties' section includes a text field for 'Report Description', a dropdown for '*Report Status' (set to 'In Progress'), a search field for '*Report Category ID', a dropdown for 'Owner ID', and a dropdown for '*Template Type' (set to 'RTF'). There are also 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'.

- Start with the **Definition** page which displays the **Report Name**.
- Enter a descriptive name for the report in **Report Description**. There is a 30-character limit.
- Under **Report Status**, change **In Progress** to **Active**. *Required in order to proceed.*
- Under **Report Category ID**, select an appropriate **Report Category** (i.e. a **Report Category** security group to which you belong).
- **Owner ID**: Select PeopleTools
- Set the **Template Type** as **RTF** if it is not already
- **Retention Days**: Leave blank
- The **Definition** page should now appear as follows:

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The screenshot shows the 'Properties' tab of a report definition. At the top, there are tabs for 'Definition', 'Template', 'Output', 'Properties', 'Security', and 'Bursting'. The 'Report Name' is 'WES_COUNTRY1'. Below this is the 'Data Source' section with fields for 'Data Source Type' (PS Query (Private)), 'Data Source ID' (WES_SFIS_TRAIN_COUNTRY_FORMAT1), and 'Data Source Description' (WES_SFIS_TRAIN_COUNTRY_FORMAT1). The 'Report Properties' section includes 'Report Description' (WES Country List EU Highlight), '*Report Status' (Active), '*Report Category ID' (CATEGORY 3), 'Owner ID' (PeopleTools), and '*Template Type' (RTF). There are also fields for 'Retention Days', 'Registered Date/Time', 'Registered By', 'Updated Date/Time', and 'Updated By'. At the bottom, there are buttons for 'Add', 'Update/Display', 'Include History', and 'Correct History', along with a 'Save' button.

- In order to save the **Report Definition**, you must first associate a **Template** with it.
- Click on the **Template** tab. Notice that the **Report Name** is displayed at the top. There is now a **Template ID** that consists of the **Report Name** plus “_1.” There can be multiple Templates associated with each Report Definition, and each one will end with a succeeding number.

The screenshot shows the 'Template' tab of the report definition. The 'Report Name' is 'WES_COUNTRY1'. The 'Template' section includes fields for '*Template ID' (WES_COUNTRY1_1), 'Description', '*Language Code' (English), and 'Channel'. There is a checkbox for 'Default Template'. Below this is the 'Template Files' section with fields for '*Effective Date' (08/26/2016), '*Status' (In Progress), and a checkbox for 'Use Data Transform'. There are buttons for 'Upload', 'Preview', and 'Use Alt. XML'. At the bottom, there are buttons for 'Add', 'Update/Display', 'Include History', and 'Correct History', along with a 'Save' button.

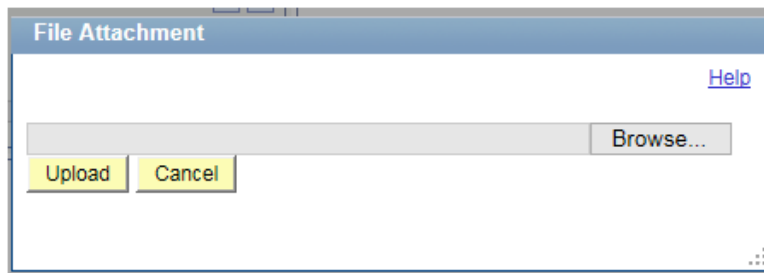
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- **Default Template:** Should be checked.
- **Description:** Enter a description for the Template (there is a 30-character limit).
- **Language Code:** Leave as **English**.
- **Channel:** Leave blank.
- **Effective Date:** Defaults to today's date. This can be changed. Leave as is.
- **Status:** Change **In Progress** to **Active**. **Required in order to proceed.**
- Leave the **Use Data Transform** box unchecked.
- Leave the **Use Alt. XML** box unchecked.

The screenshot shows the 'Template' configuration page for a report named 'WES_COUNTRY1'. The page has tabs for 'Definition', 'Template', 'Output', 'Properties', 'Security', and 'Bursting'. The 'Template' tab is active. The 'Report Name' is 'WES_COUNTRY1'. The 'Template' section includes fields for '*Template ID' (WES_COUNTRY1_1), 'Description' (Country EU Highlight 1), '*Language Code' (English), and 'Channel'. A 'Default Template' checkbox is checked. The 'Template Files' section includes '*Effective Date' (08/26/2016), '*Status' (Active), and checkboxes for 'Use Data Transform' (unchecked) and 'Use Alt. XML' (unchecked). There are 'Upload', 'Preview', and 'Save' buttons. At the bottom, there are 'Add', 'Update/Display', 'Include History', and 'Correct History' buttons.

- Upload the **RTF Template** by clicking on the yellow **Upload** button (Note: In Internet Explorer, you may need to hold down the CTRL key at the same time).
 - A popup menu will appear prompting you to browse for the **RTF Template** file you recently created. Click on the **Browse** button and navigate to the location of the file.



- After you browse and locate the **RTF Template** file, click on the yellow **Upload** button to upload the file.

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- Once you have uploaded the template, you will see the following at the bottom of the page, in the **Template Files** section.
- Notice that in the original name there were spaces: **BI Tutorial Country 1.rtf**. When its name is displayed here, the spaces are replaced by underscores: **BI_Tutorial_Country_1.rtf**.

The screenshot shows a 'Template Files' window with a dark blue header. On the right side of the header, there are navigation controls: 'Find | View All', 'First', '1 of 1', and 'Last'. Below the header, the main area is light gray. It contains the following elements:

- Effective Date**: 08/26/2016, with a '+' and '-' icon to its right.
- *Status**: A dropdown menu currently showing 'Active'.
- Use Data Transform**
- Template File**: BI_Tutorial_Country_1.rtf
- Upload**: A yellow button with a dashed border.
- Preview**: A yellow button.
- Use Alt. XML**

- You can run a Preview at this point, which will be similar to the PDF previews you saw before, i.e. it will contain sample data and it will not display the conditional formatting that you created.
- This Preview, however, is an RTF file.
- The beginning of the file looks like this:

BI Publisher Template Example List of Countries with Codes EU Members Highlighted

E	3 Char. Code	2 Char. Code	EU Member State
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E

- Close the Preview.
- Click on the **Output** tab. Change the **Default to RTF**.

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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"/>

- Do not make any other changes on the **Output** page.
- Save the **Report Definition** by clicking on the **Save** button in the lower left.
- Now that this step has been completed, you can publish the report.

3a Run Time: Publish BI Publisher Report

- **Query Report Viewer:**
- Below is one of the methods for publishing a BI Publisher Report: **Query Report Viewer**.
- The second method, using [Query Report Scheduler](#) and **Query Manager** is discussed under **Section 3b**.
- Navigate to the page - **Reporting Tools > BI Publisher > Query Report Viewer**
- On the **Query Report Viewer** page, enter the **Report Name** and click the **Search** button.

Enter any information you have and click Search. Leave fields blank for a list of all values.
*Search by: Report Name begins with

- The RTF file opens, and the page appears as follows:

Search Results [Show Template Prompts](#)

Report Name	Description	Data Source ID	*Format	Burst	View Report
WES_COUNTRY1	WES Country List EU Highlight	WES_SFIS_TRAIN_COUNTRY_FORMAT1	RTF	N	View Report

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- You'll see that the **Format** is shown as **RTF** which you should leave as is.
- Click on the **View Report** link. **Open** the file. You could also **Save** it at this time if you wish. *If you do, be sure to give it a new name.*
- The entire first page (1 of 9) resembles the following. You will recall that when you set up the **Conditional Formatting** you checked the box for the Conditional Formatting to **Apply to Entire Table Row**, and you can observe that in the report.

BI Publisher Template Example
List of Countries with Codes
EU Members Highlighted

A	3 Char. Code	2 Char. Code	EU Member State
Afghanistan	AFG	AF	N
Aland Islands	ALA	AX	N
Albania	ALB	AL	N
Algeria	DZA	DZ	N
American Samoa	ASM	AS	N
Andorra	AND	AD	N
Angola	AGO	AO	N
Anguilla	AIA	AI	N
Antarctica	ATA	AQ	N
Antigua and Barbuda	ATG	AG	N
Argentina	ARG	AR	N
Armenia	ARM	AM	N
Aruba	ABW	AW	N
Australia	AUS	AU	N
Austria	AUT	AT	Y
Azerbaijan	AZE	AZ	N

B	3 Char. Code	2 Char. Code	EU Member State
Bahamas	BHS	BS	N
Bahrain	BHR	BH	N
Bangladesh	BGD	BD	N
Barbados	BRB	BB	N
Belarus	BLR	BY	N
Belgium	BEL	BE	Y
Belize	BLZ	BZ	N
Benin	BEN	BJ	N
Bermuda	BMU	BM	N
Bhutan	BTN	BT	N
Bolivia	BOL	BO	N
Bonaire, Saint Eustatius & Saba	BES	BQ	N
Bosnia and Herzegovina	BIH	BA	N

BI Tutorial Country 1.rtf Page 1 of 9

- **Save** a copy of the report by doing a Save As an RTF file.

- **Be sure to give it a new name.**
- You can use it as an RTF file or save the RTF file as a Word Document. Once you have saved it you can use it as you would any other Word document.
- At any time you can go back into the Template and make formatting or other changes.
 - *If you do, you will need to upload the Template again into the existing Report Definition to have the latest version associated.*

3b Run Time: View/Post in Report Manager

- **Query Report Scheduler:** The other method to produce the report is through **Query Report Scheduler**.
- Below you will see two approaches for generating the report:
 - **Email attachment**
 - **Report Manager**
- Navigate to the page: **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

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](#)

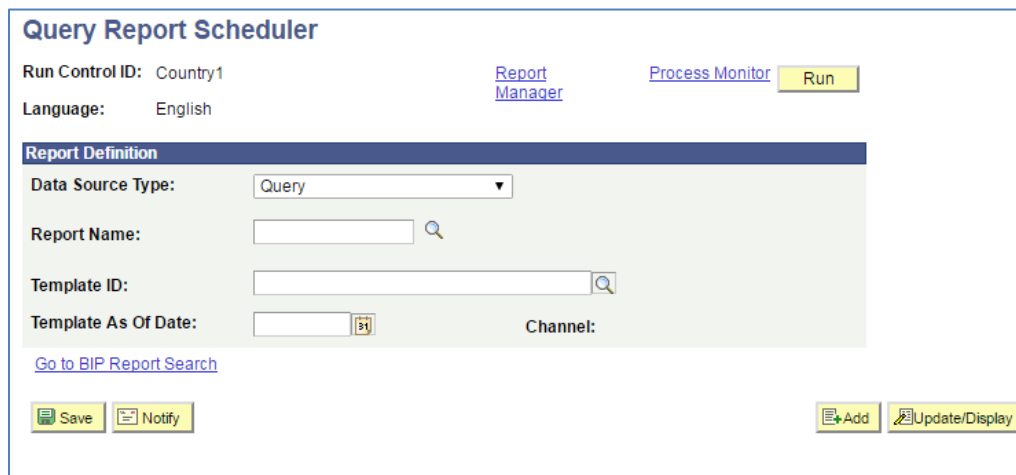
- **Sending the report as an email:**
 - Since this Report has not yet been run through the **Query Report Scheduler**, you will need to set up a **Run Control ID**.
 - Click on the **Add a New Value Tab**

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- Type in a new **Run Control ID** and click the **Add** button.
- The following page opens:



- Populate the fields as follows:
 - **Data Source Type:** The default should be **Query**. If it is not, change it to **Query**.
 - **Report Name:** You can search for or enter the entire name.
 - **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.
 - **Template As Of Date:** To be filled in if the date is a factor.
- Click on **Save** to save this **Run Control**
- Click on **Run**

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The screenshot shows the 'Query Report Scheduler' window. At the top, it displays 'Run Control ID: Country1' and 'Language: English'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below this is the 'Report Definition' section with fields for 'Data Source Type' (Query), 'Report Name' (WES_COUNTRY1), 'Template ID' (WES_COUNTRY1_1), and 'Template As Of Date'. There are also buttons for 'Save', 'Notify', 'Add', and 'Update/Display'.

- The **Process Scheduler Request** page opens:

The screenshot shows the 'Process Scheduler Request' dialog box. It includes fields for 'User ID: CPIKE01' and 'Run Control ID: Country1'. There are also fields for 'Server Name', 'Run Date' (08/30/2016), 'Recurrence', 'Run Time' (10:41:43AM), and 'Time Zone'. A 'Reset to Current Date/Time' button is present. Below these fields is a 'Process List' table with columns for 'Select', 'Description', 'Process Name', 'Process Type', '*Type', '*Format', and 'Distribution'. The table contains one entry: 'BI Publisher Query Report' with process name 'PSXPQYRPT' and type 'BI Publisher'. The '*Type' is set to 'Web' and '*Format' is 'RTF'. There are 'OK' and 'Cancel' buttons at the bottom.

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	BI Publisher Query Report	PSXPQYRPT	BI Publisher	Web	RTF	Distribution

- Change the **Type** from **Web** to **Email**.
 - In order to have an email sent to your email address, click on the **Distribution** link.
 - The **Distribution Detail** page open. It defaults to your name as the **User**. You can add other recipients where indicated.

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Distribution Detail

Process Name: PSXPQRYRPT
Process Type: XML Publisher
Folder Name:
Retention Days:

Email Only

Email Subject: Email With Log: Email Web Report:
Message Text:
Email Address List:

Distribute To

*ID Type	*Distribution ID
User	CPIKE01

OK Cancel

- Click **OK** to return to the **Process Scheduler Request** page. Then click **OK** on that page.

Process Scheduler Request

User ID: CPIKE01 Run Control ID: Country1

Server Name: Run Date: 08/30/2016
Recurrence: Run Time: 10:41:43AM
Time Zone:

Process List

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	BI Publisher Query Report	PSXPQRYRPT	BI Publisher	Email	RTF	Distribution

OK Cancel

- When you are returned to the **Query Report Scheduler** page, click **Save** again to save the changes for the **Run Control**.
- Then **Run** as you would any Process Scheduler process until the **Run Status** is at **Success** and **Distribution Status** is at **Posted**.
- You should shortly receive an email message with the **RTF report** attached.

- **Report Manager:**

The screenshot shows the 'Query Report Scheduler' search interface. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all'. Below this are two tabs: 'Find an Existing Value' and 'Add a New Value'. A 'Search Criteria' section is expanded, showing 'Search by:' with a dropdown menu set to 'Run Control ID' and a text input field for 'begins with'. There is also a 'Case Sensitive' checkbox. At the bottom of the search area are 'Search' and 'Advanced Search' buttons. Below the search area are links for 'Find an Existing Value' and 'Add a New Value'.

- On the **Query Report Scheduler** page, set up a **Run Control ID**.
 - Click on the **Add a New Value Tab**
 - Populate the fields as previously shown.
 - Click on **Save** to save this **Run Control**.
 - Click on **Run**

The screenshot shows the 'Query Report Scheduler' report definition page. It displays 'Run Control ID: Country1a' and 'Language: English'. There are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. The 'Report Definition' section shows 'Data Source Type: Query', 'Report Name: WES_COUNTRY1' (with a search icon), 'Template ID: WES_COUNTRY1_1' (with a search icon), and 'Template As Of Date: [empty]'. The 'Channel:' field is also present. At the bottom, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Add', and 'Update/Display'. A link 'Go to BIP Report Search' is also visible.

- Click on **OK** and then on **Process Monitor**. Run as you would any Process Scheduler process.

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- Once the **Run Status** is at **Success** and **Distribution Status** is at **Posted**, click on the link **Go back to Query Report Scheduler**.
- Click on the **Report Manager** link.

Query Report Scheduler

Run Control ID: Country1a [Report Manager](#) [Process Monitor](#)

Language: English

Report Definition

Data Source Type: Query

Report Name: WES Country List EU Highlight

Template ID: Country EU Highlight 1

Template As Of Date: Channel:

[Go to BIP Report Search](#)

- When the following page opens, click on the **Report** link.

View Reports For

Folder: Instance: to:

Name: Created On: Last 1 Days

Reports Personalize | Find | View All | First 1 of 1 Last

	Report	Report Description	Folder Name	Completion Date/Time	Report ID	Process Instance
1	WES_COUNTRY1 - WES_COUNTRY1.rtf	WES_COUNTRY1 - WES_COUNTRY1.RTF	General	08/30/16 11:38AM	776218	669502

[Go back to Query Report Scheduler](#)

List | Explorer | Administration | Archives

- When the **Report** page opens, click on the **Name** link.

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Report		
Report ID: 776218	Process Instance: 669502	Message Log
Name: XMLP	Process Type: XML Publisher	
Run Status: Success		
WES_COUNTRY1 - WES_COUNTRY1.rtf		
Distribution Details		
Distribution Node: RPTDIST	Expiration Date:	02/26/2017
File List		
Name	File Size (bytes)	Datetime Created
WES_COUNTRY1.rtf	399,927	08/30/2016 11:38:33.697488AM EDT
Distribute To		
Distribution ID Type	*Distribution ID	
User	CPIKE01	

- You will be prompted to save the **RTF** file in the location you have been using.
- ***Be sure to save the file with a new name.***

This concludes Lesson 1.