BI Publisher TEMPLATE Tutorial

Lesson T1 – Create, Format and View a Simple Report Using an Existing Query

- *This tutorial assumes that you…*
  - *have at minimum BIP Power User security*
  - *are familiar with PS Query (you do not have to create a query for this Lesson)*
  - *have downloaded the BI Publisher Design Helper*

If you are not creating the query and/or registering the Data Source, the steps are as shown here. Otherwise, see Tutorial 1.

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 indicated, the steps having to do with the **Template** are performed ***Offline***, that is, with no connection to PeopleSoft.

1. **Design: Data Source**
   a. *Mock Up Report (Offline)*
   b. Identify Data Source – PeopleSoft Query *- Identify and review the query, not create*
   c. Register Data Source with BI Publisher – Not included in this Lesson.
2. **Design: Template and Report**
   a. Download Sample Data Using Report Definition
   b. *Create BI Publisher Report Template (Offline)* – ***After*** *downloading the BI Publisher Design Helper*
   c. *Preview and Tweak until Complete (Offline)*
   d. Finish Report Definition – Upload Template
3. **Run Time: Request and View**
   a. Publish BI Publisher Report
   b. View/Post in Report Manager

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 – Identify Data Source – PeopleSoft Query

- ***PEOPLESOFT TEST:*** Search for and open an existing Public Query in the ***SFIS PeopleSoft TEST Database***
- The Query is named: **WES_SFIS_TRAIN_BIP_COUNTRY_T1**
- Run and review the query to familiarize yourself with the contents.
- Do not make any changes to this query. It contains these fields:

Query Name WES_SFIS_TRAIN_BIP_COUNTRY_T1 **Description** Country Format Tutorial Tmplat Feed

View field properties, or use field as criteria in query statement. Reorder / Sort

Fields Personalize | Find | View All | First 1-5 of 5 Last

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

- The countries are sorted alphabetically by the **Letter** field and the **Descr** field. The first few rows of the Query 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
5	A	American Samoa	ASM	AS	N
6	A	Andorra	AND	AD	N
7	A	Angola	AGO	AO	N
8	A	Anguilla	AIA	AI	N
9	A	Antarctica	ATA	AQ	N
10	A	Antigua and Barbuda	ATG	AG	N
11	A	Argentina	ARG	AR	N

- After reviewing the Query, you can close it. Next you will download the **Sample Data** from the **Query** to the **Report Definition**.

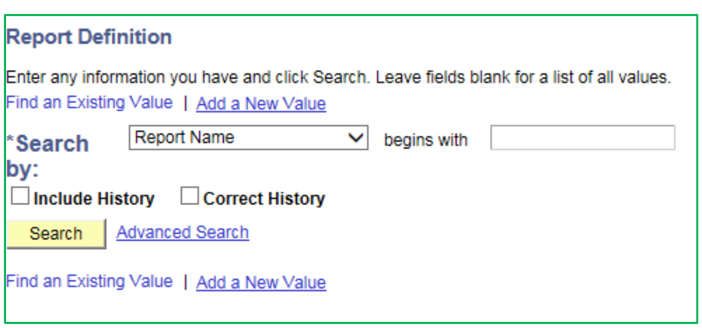
2a Download Sample Data Using Report Definition

In order to create a **BI Publisher Word Template**, you need to have **Sample Data** that the **Template** can utilize. One method to associate the **Sample Data** with the **Template** is through the creation of the **Report Definition**. Here are the key points to understand about this method:

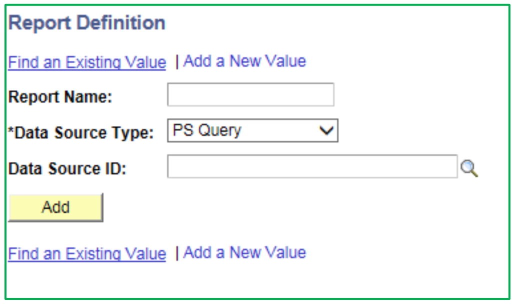
- When creating a **Report Definition**, you can select a PeopleSoft Query data source that has not yet been registered and that ***data source is registered automatically once the Report Definition is saved***.
- Keep in mind that you cannot save a **Report Definition** until you have uploaded a **Template**.
  - Since you cannot upload a **Template** until the **Template** has been created and saved, and
  - since the **Template** needs a **Data Source** (**XML file**) in order to be created,
  - if a **Data Source** does not exist,
    - you will first need to **download Sample Data in the form of an XML file** for use in creating the **Template**.
- So, in order for a **Word Template** to be created, the **Data Source** derived from the **Query** must be saved as an **XML file** in a location where you can access it.

The steps for downloading **Sample Data** using **Report Definition** are as follows:

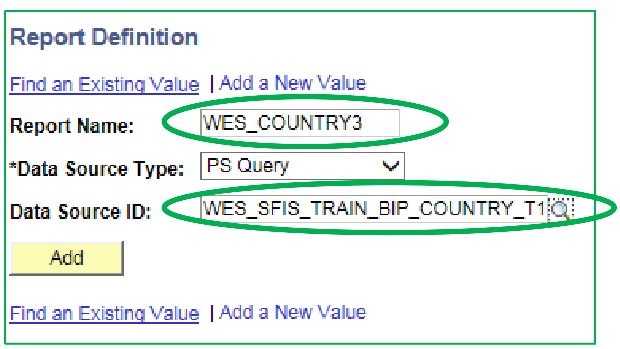
- Navigate to: ***Reporting Tools > BI Publisher > Report Definition***



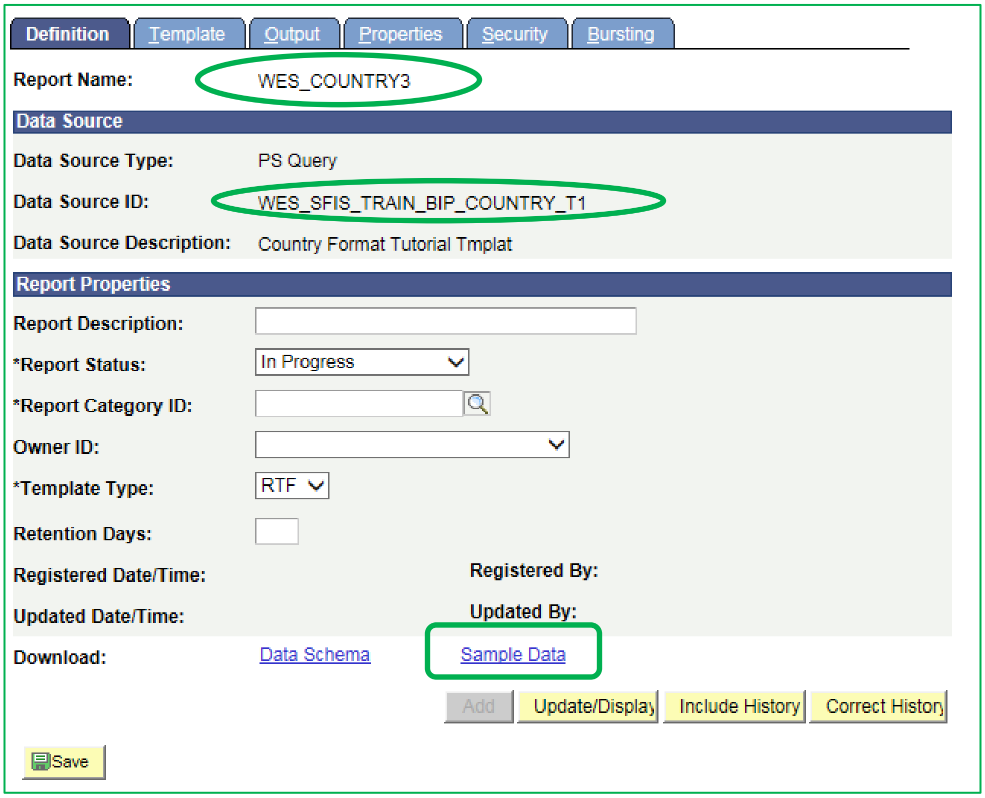
- Click on **Add a New Value**
- The next page opens with these fields:



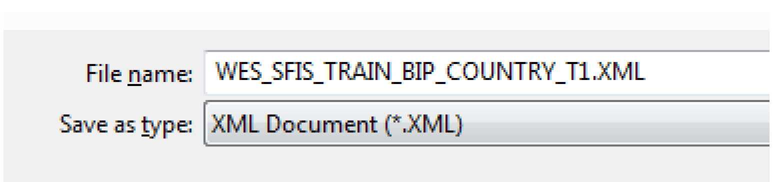
- **Report Name:** Create a new report name. There is a 12-character limit. In this example, the Report Name will be **WES_COUNTRY3**
- **Data Source Type:** Leave as **PS Query.** (Note that for Power Users, the field is grayed out.)
- **Data Source ID:** In the **Data Source ID** dropdown box you can 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. In this example, the Query name is **WES_SFIS_TRAIN_BIP_COUNTRY_T1**
- The fields will resemble this:



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



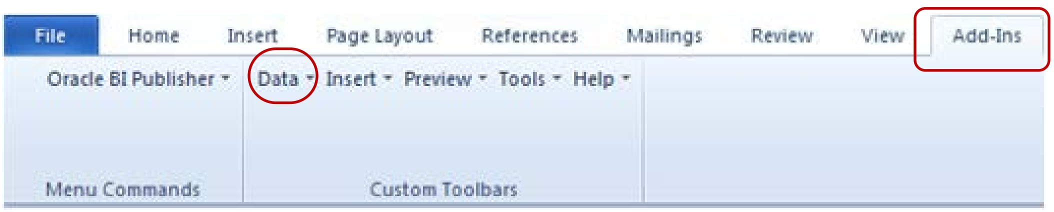
- **Note: You will not be filling out some of the fields at this time, just those fields listed here.**
- **Template Type:** Default should be **RTF**. Leave as is.
- **Sample Data:** Click on the link to save the **Sample Data** to be used by the **BI Publisher Word Template**.
  - When the popup menu appears, click on **Save**, or **Save as** and save the **Sample Data** file where you will be storing your **Template**.
  - If not changed, it will have the query name with an extension of **xml**. Do not change the extension.



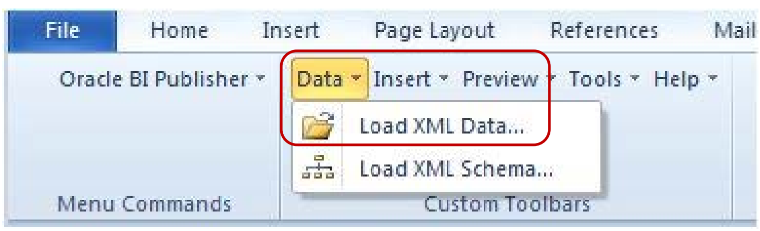
- In this case, the **Sample Data** name is: **WES_SFIS_TRAIN_BIP_COUNTRY_T1.XML**
- If you attempt to save **Report Definition** at this time, you will receive an error message.
  - As noted earlier, **Report Definition** cannot be saved until the **Template** has been uploaded.
  - You can leave this page open until you are ready to upload the **Template**.
  - If you are not going to be creating the **Template** at this time, or if for some reason you leave the **Report Definition** page, you can create the **Report Definition** at any time.

2b *Create BI Publisher Report Template (Offline)*

- Once the **Sample Data** (XML file) has been saved, open **MS Word** to create a new document.
  - A blank **Word** document opens.
  - You will now able to load the **XML Sample Data** file to use as the basis for the **Template** you are creating with **Word**.
  - If you wish, you can save the document at this point as an RTF file, or you can wait until later.
    - *Whether now or later, keep in mind that you **must** save the RTF file before you can run **Preview**.*
- Select **Add-Ins** from the menu.

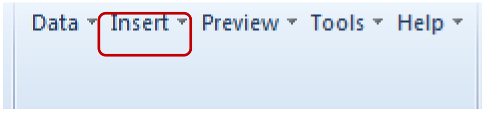


- To gain access to the data in the **XML Sample Data** file, click on the **Data** menu and select **Load XML Data**

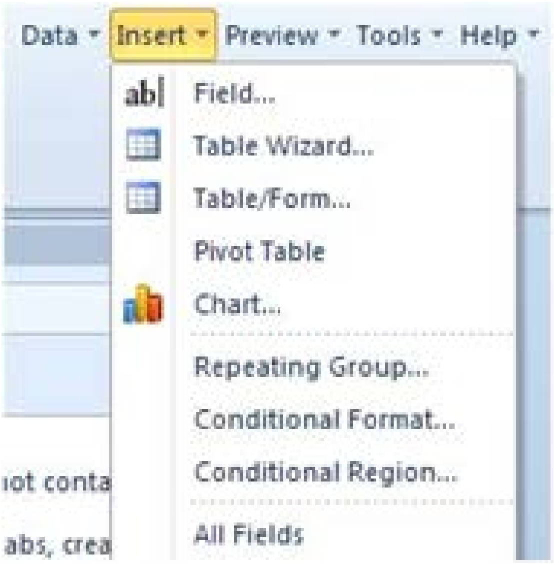


- Windows Explorer opens.
- Navigate to the directory where you saved the **XML file**
- Click to open the file. In this example, it is **WES_SFIS_TRAIN_BIP_COUNTRY_T1.XML**
- When this message appears, click OK

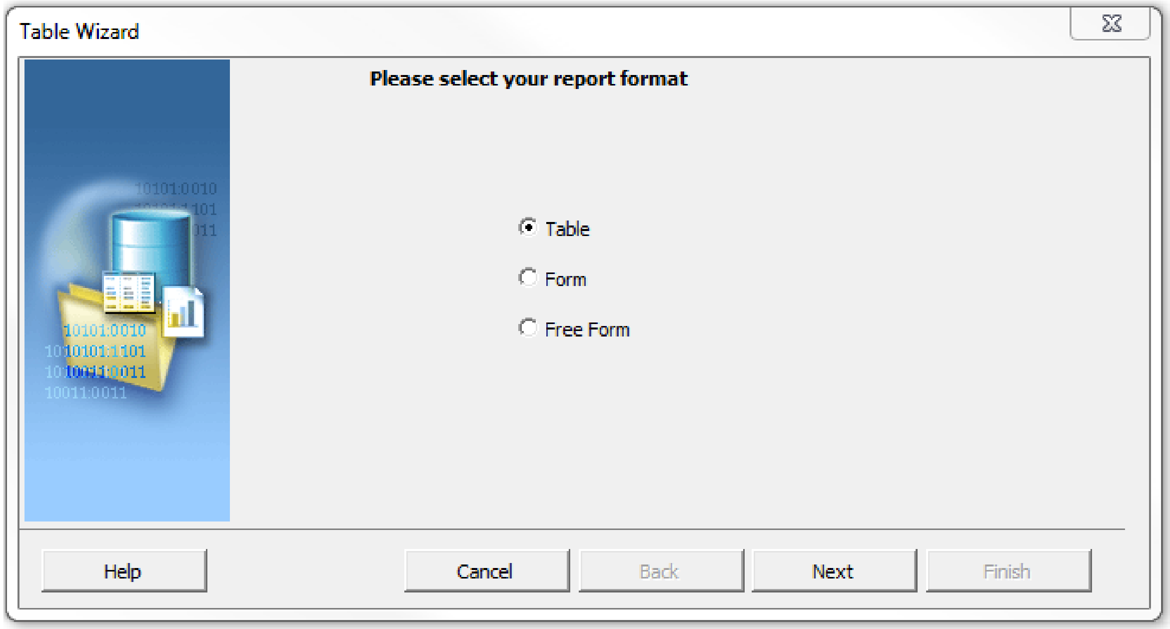
- **Tip:** Before you insert the fields, you can start to format the overall dimensions of the page. For example, set your margins and line spacing and put in a few blank lines at the top of the page. In this example, the margins are 0.5" on either side and the document is single spaced.
- To begin inserting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



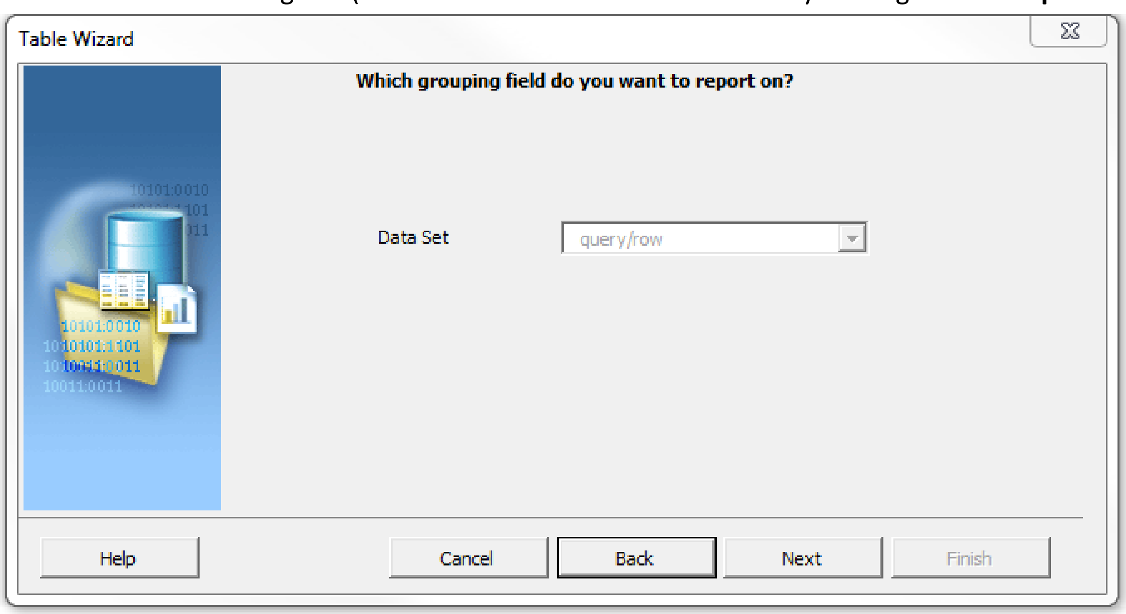
- The **Insert** menu appears as follows:



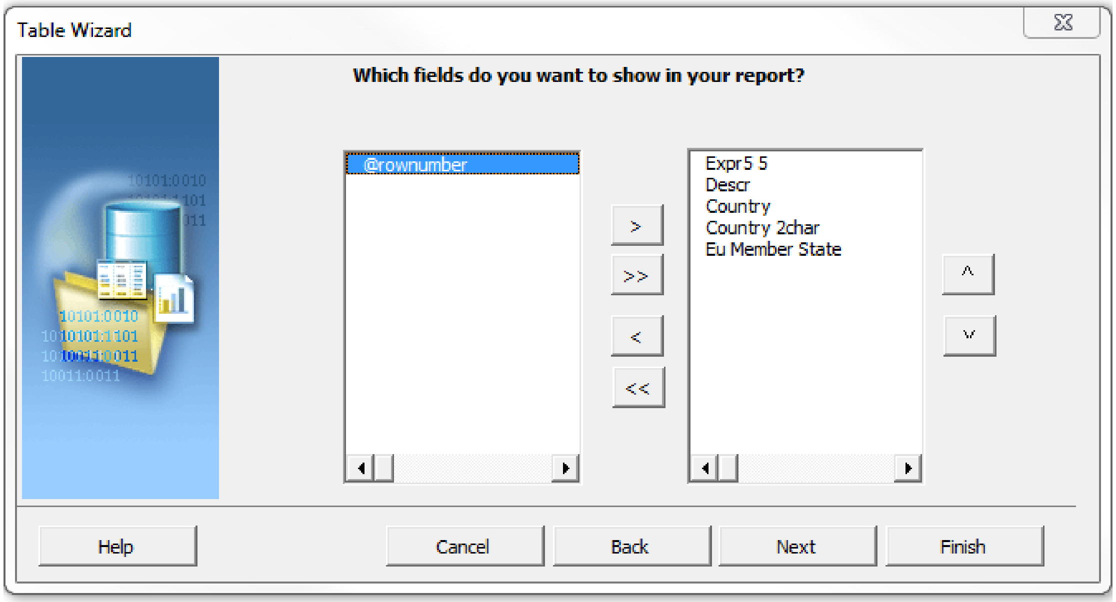
- There are a number of methods for inserting the fields into the Word **Template**.
- The easiest way to initially display all rows of data is to use the **Table Wizard**, which is the method that will be demonstrated here.
- Place your cursor on the page where you would like to locate the beginning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



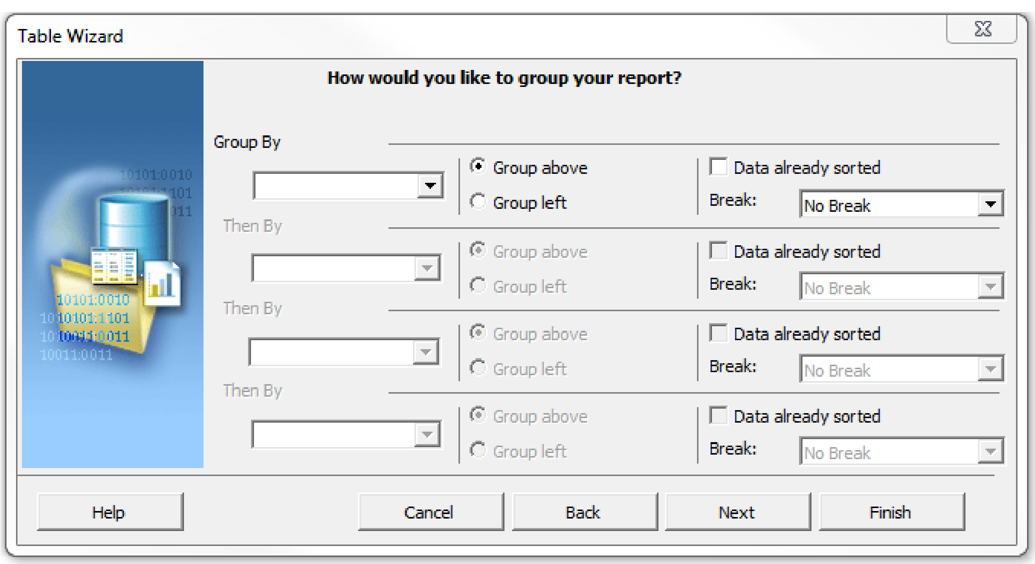
- You will be creating a **Table**, so accept that default by clicking **Next**.
- **"Which grouping field do you want to report on?"** This page opens with a dropdown box for the **Data Set**. An XML document can contain many data sets. This file only contains one, so you can click **Next** again. (You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



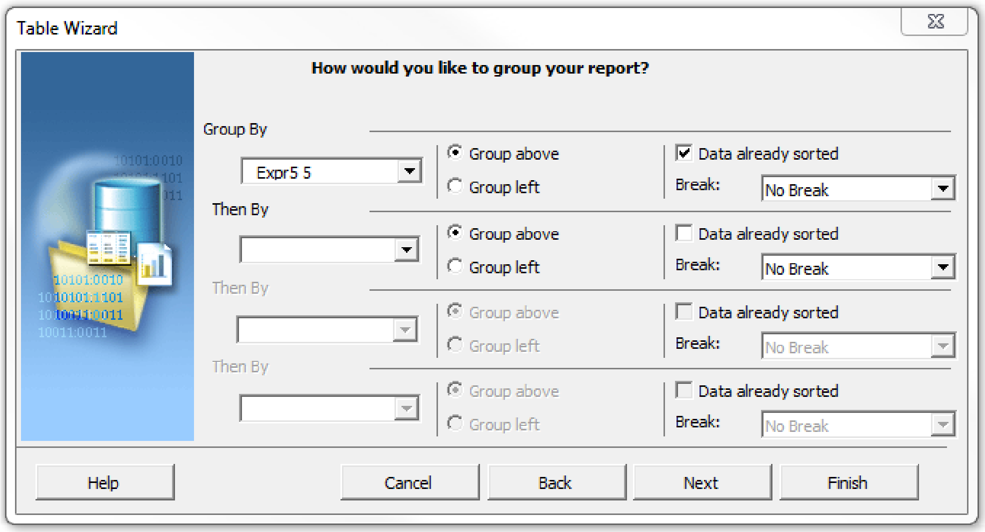
- Drag over the five query fields so the page look like this:



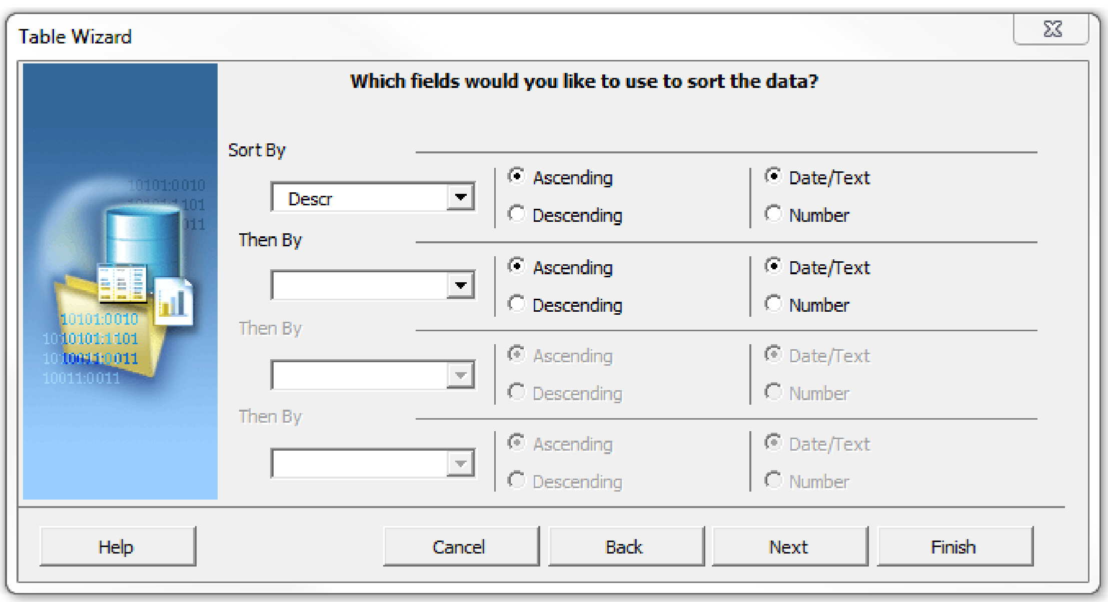
- Note that the first field has a name of **Expr5 5**. This is the field in the Query with a heading of **Letter,** created with an Expression. The contents of the field are the letters of the alphabet.
- Click **Next**.
- The following page opens –"**How would you like to group your report?"**
  - First, 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.



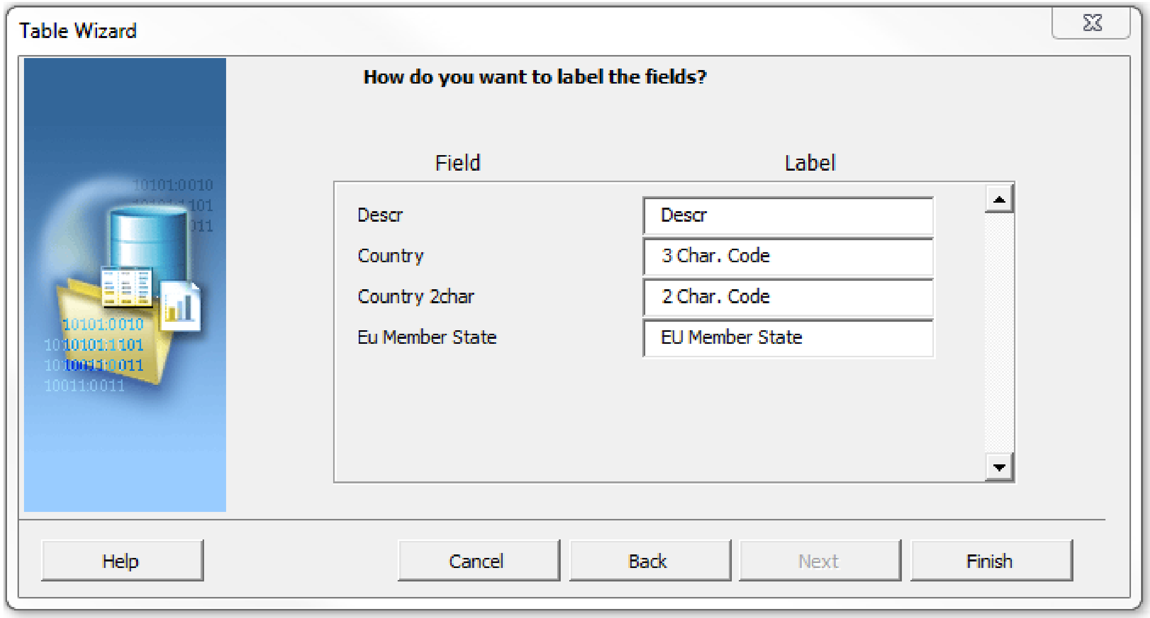
- After you make the entries , the page appears as shown here:



- 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**.



- 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:



- 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

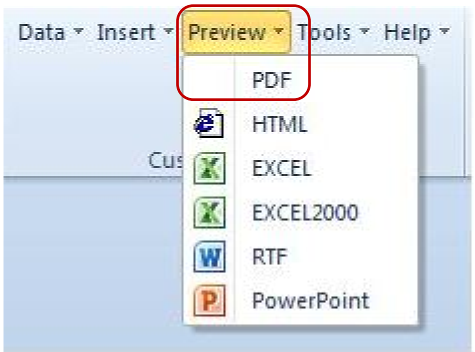
Descr	3 Char. Code	2 Char. Code	EU Member State
F DESCR	COUNTRY	COUNTRY_2CHAR	EU_MEMBER_STATE E

end row by EXPR5_5

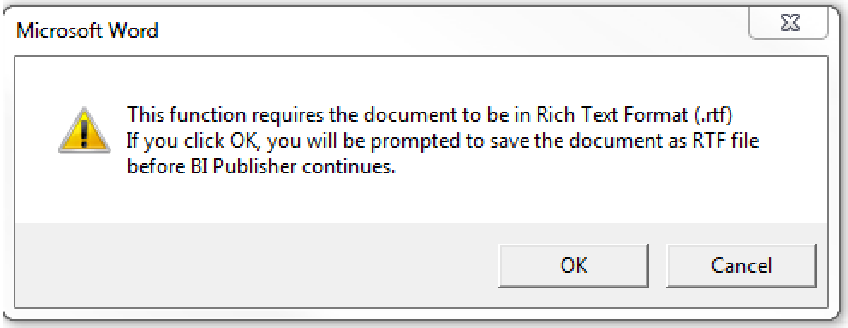
- This is a brief explanation of the codes you see that have been added through the **Table Wizard**:
  - **group row by EXPR5_5** – indicates the beginning of the grouping as well as the order
  - **F** - "for-each" code to designate the **start of each row** (before the first field in the row, DESCR) 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 **WES_COUNTRYY3.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 upload the **Template** in the **Report Definition**, it will appear as shown here.
- 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:

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:

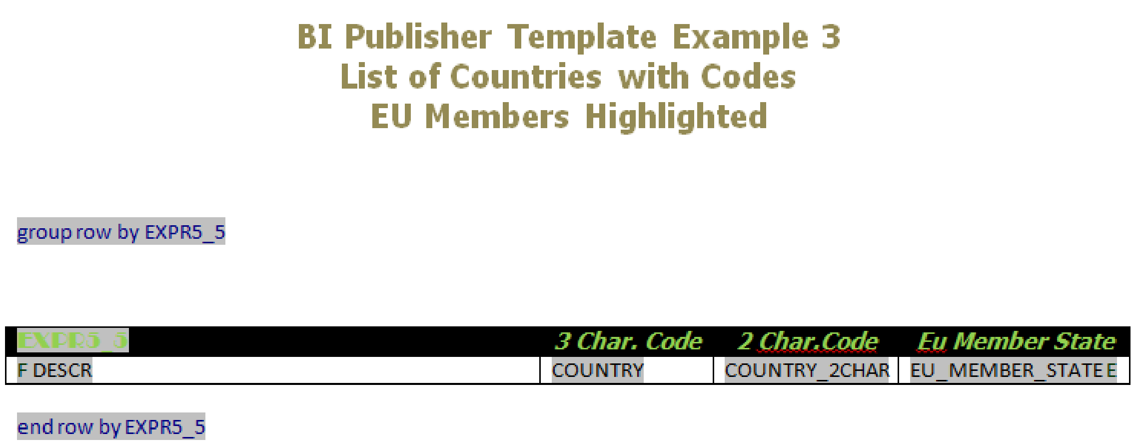
E	3 Char. Code	2 Char.Code	Eu Member State
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data	COU	CO	E
DESCR sample data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

- If you're satisfied with its appearance so far, you can save the RTF file at this point.

- Using MS Word processes make some formatting changes:
  - Change the background color of the labels to Black.
  - Change the text color of the **EXPR5_5** field and the three labels to Light Green.
  - Change the font of the **EXPR5_5** field to Broadway, Bold, Italic.
  - Change the font of the three labels to Tahoma, Bold, Italic, 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 Tahoma, Bold, Tan, Background 2.

BI Publisher Template Example 3
List of Countries with Codes
EU Members Highlighted

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


BI Publisher Template Example 3
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:

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

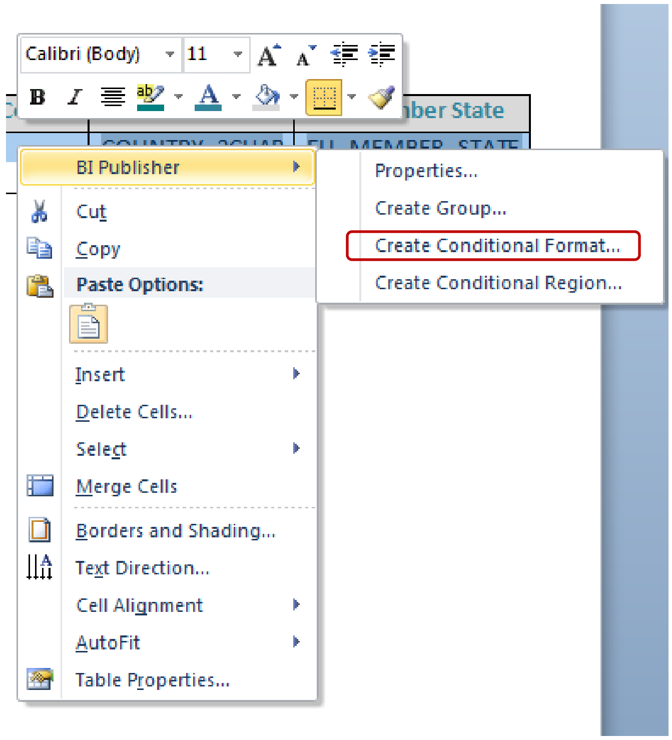
BI Publisher Template Example 3
List of Countries with Codes
EU Members Highlighted

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

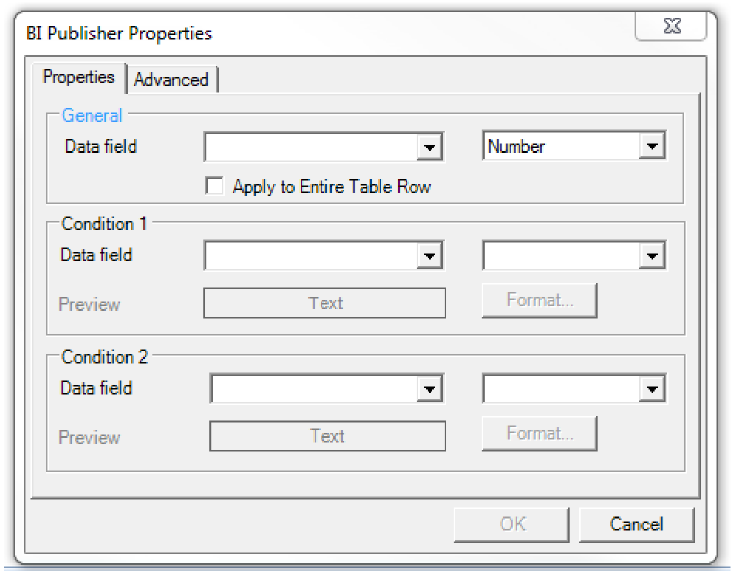
- The next formatting task is **Conditional Formatting**, which is **a BI Publisher** process.
  - Since the data shown is sample data, you will not see the effects of the **Conditional Formatting** until you upload the **Template** in the **Report Definition** and run it in the **Query Report Viewer**.
  - 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 E

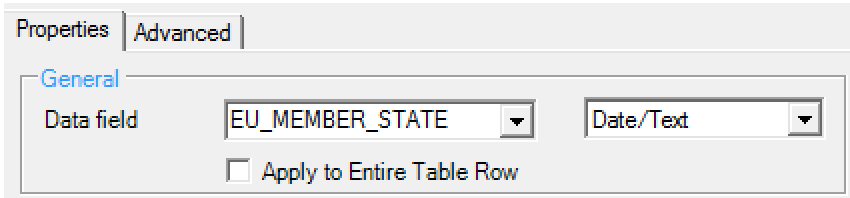
- Right click so that the following menus open.
- Click on **BI Publisher** at the top of the menu, and then click on **Create Conditional Format…**



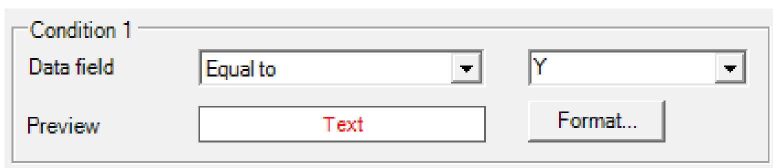
- The following menu opens:



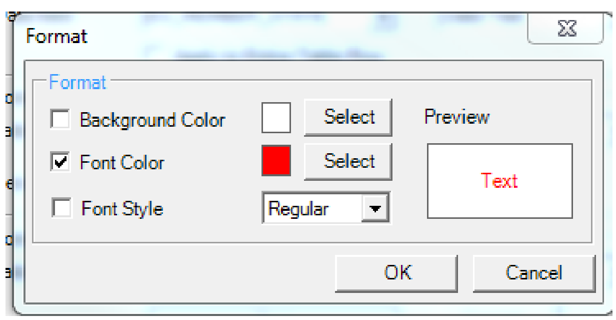
- Under the **General** Section, In the **Data field** dropdown, select the field **EU_MEMBER_STATE**. This is a Yes/No field and the information contained is either a “Y” or an “N.”
- We will first format the rows for countries that have a “Y” in that field. This portion of the menu should appear as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



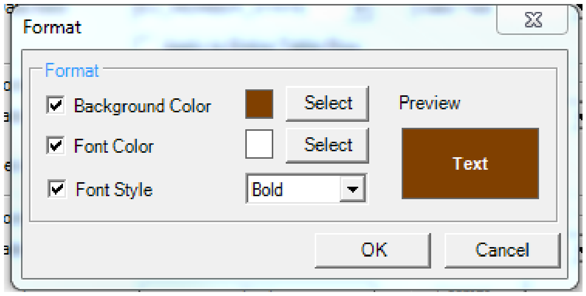
- For the right-hand field, change **Number** to **Date/Text**.
- Do not check the box to indicate you wish the format to **Apply to Entire Table Row**. With this setting, when the final report is rendered, only the first column will be highlighted.
- In the next section, **Condition 1**, select from 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 the word Text in red on a white background, and that the **Format** button is no longer grayed out.



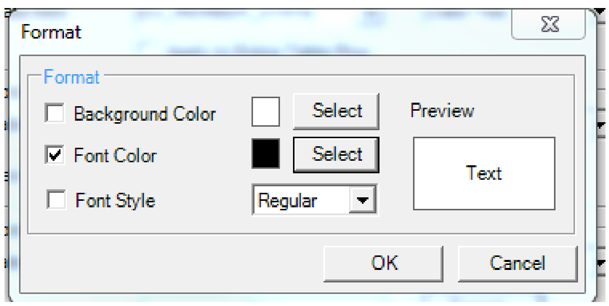
- Click on the **Format** button to open the Format menu:



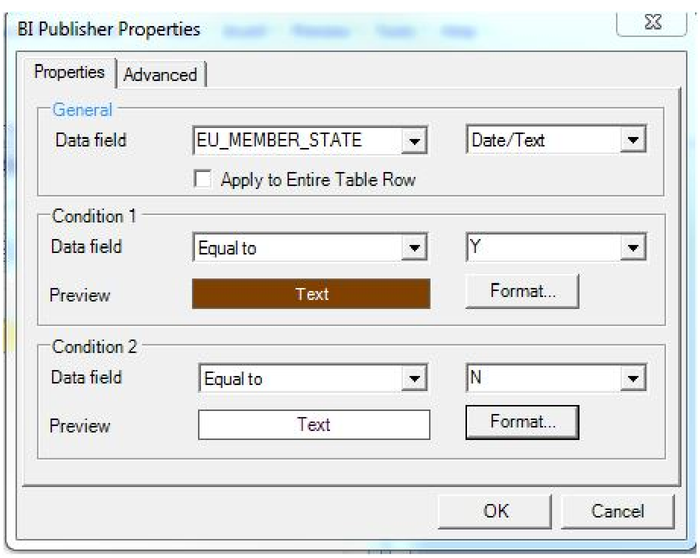
  - Check the **Background Color** box and Select Tan or Brown.
  - The **Font Color** box is already checked. Select White.
  - Check the **Font Style** and select Bold. The Format section for **Condition 1** should now appear as follows:



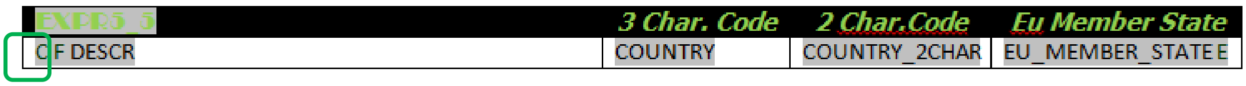
- Click **OK**.
- Under **Condition 2**, set the **Data field** equal to "N" (no quotes). And select these colors:
    - For the **Format** menu, leave the **Background Color** as the default of White
    - For the **Font Color** select **Black**
    - **Condition 2** should look like this:



- 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:

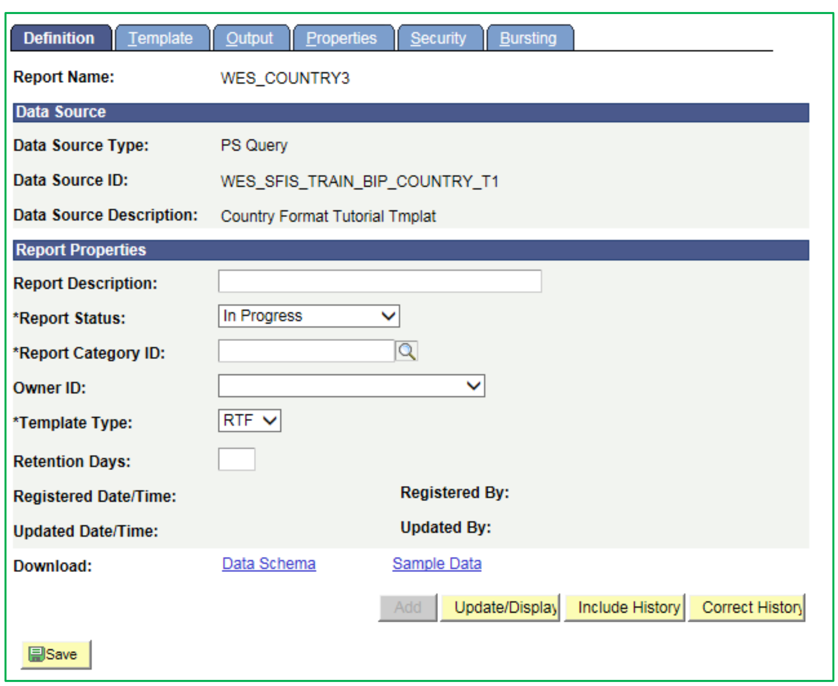


- If need to edit the **Conditional Format**, you can double-click the "**C**" and the menu will open.
- You can run a Preview, but you will not see these conditional formatting changes.
  - Since this is **Sample Data**, and since this formatting is conditional, you won't see it in effect until the **Template** is uploaded in the **Report Definition**, i.e., the actual live data.
- You should **Save** the **Template** at this time .

2d Finish Report Definition – Upload Template

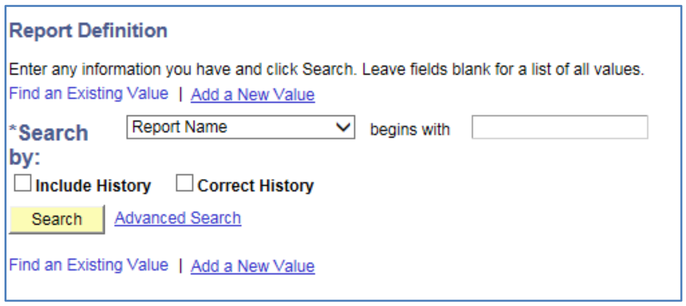
- In this step we relate the recently saved **Template** with the **Data Source** in **PeopleSoft**. Until this point, there is no direct connection between them.
- There are two ways to complete the association between the **Template** and the **Data Source**:
  - **Report Definition Page is Open**

  - **If the Report Definition** *page is still open*, go to that page to complete it. See **Upload Template Steps** section below.

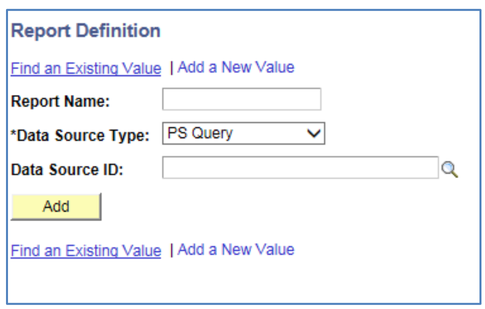


o Report Definition Page is Not Open

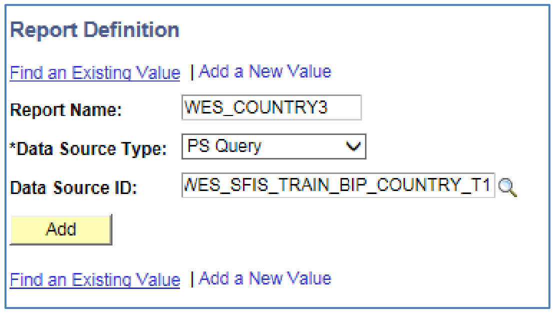
- o If the **Report Definition** *page is* ***not*** *still open*, follow these steps to get to the same point:
  - ▪ Navigate to **Report Definition**: ***(Reporting Tools > BI Publisher > Report Definition)***



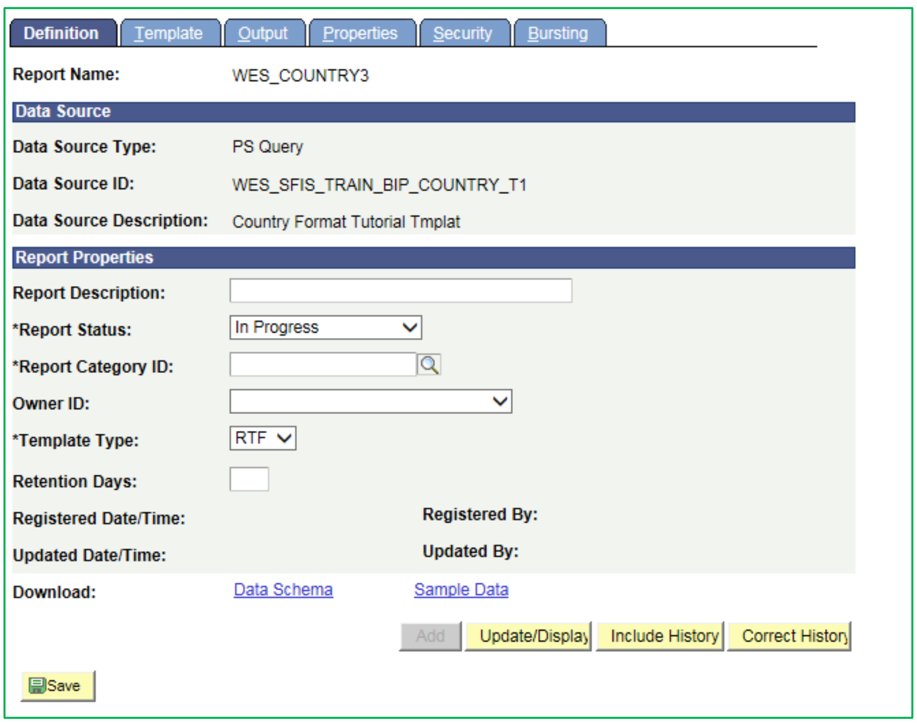
- Click on **Add a New Value**.



- Enter a new **Report Name**. There is a 12-character limit. In this example, the new **Report Name** is **WES_COUNTRY3**.
- **Data Source Type:** The default should be set to **PS Query**. If it is not, select **PS Query**. (Note that this field is grayed out for Power Users.)
- **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. In this example, it is **WES_SFIS_TRAIN_BIP_COUNTRY_T1**



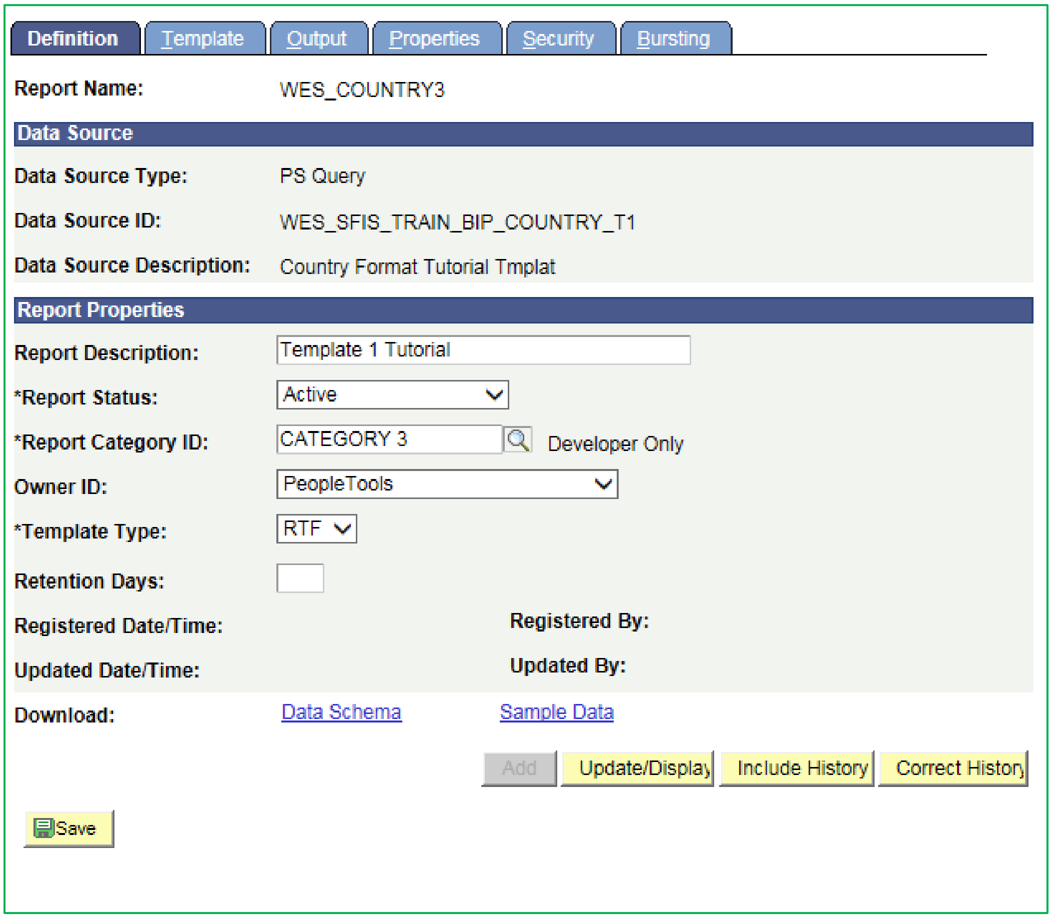
- Click the **Add** button. The **Report Definition** pages will appear. See **Upload Template Steps** to proceed:



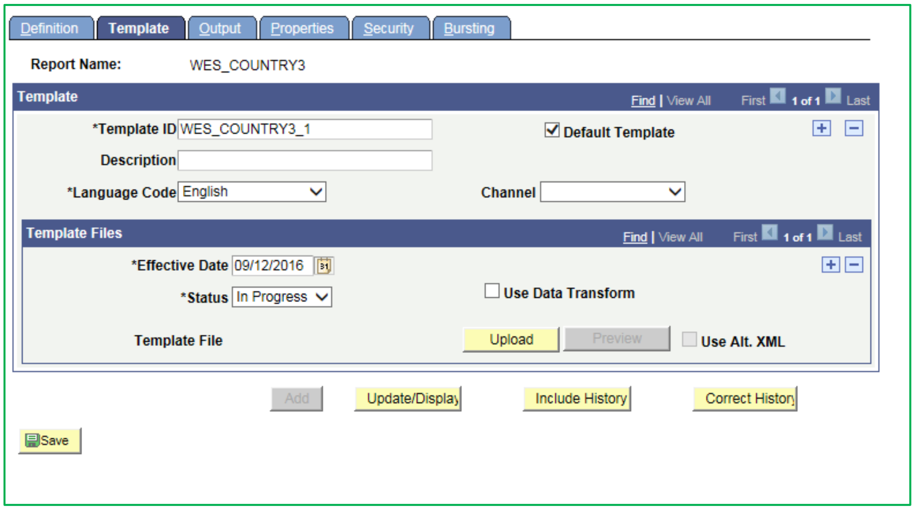
Upload Template Steps

- Starting with the **Definition** page which displays the **Report Name (WES_COUNTRY3** in this case**)**, enter a descriptive name for the report in **Report Description**. There is a 30-character limit.
- **Report Status**: Change **In Progress** to **Active.** ***This is required in order to proceed.***
- **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

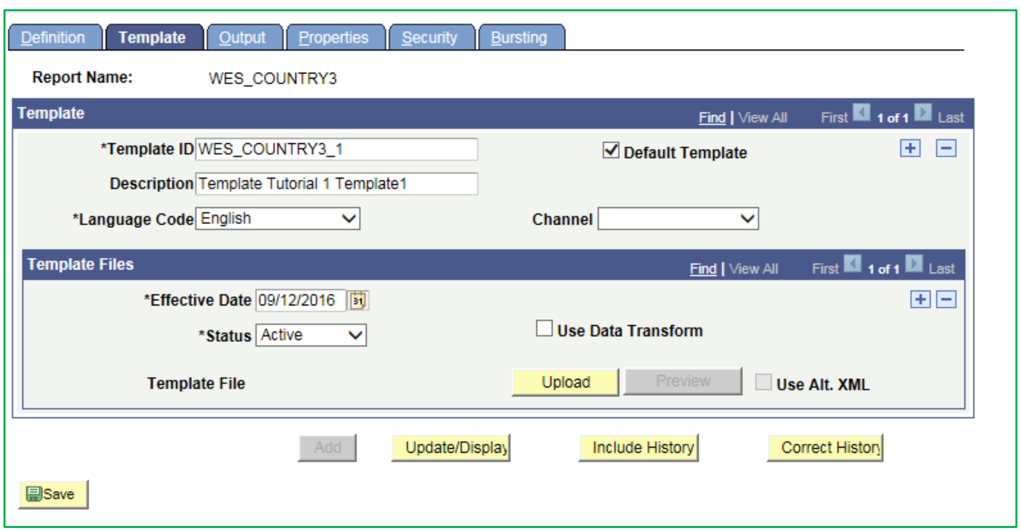
- **Retention Days**: Leave blank
- The **Definition** page should now appear as follows:



- *In order to save the **Report Definition**, you must first associate the **Template** with it.*
- Click on the **Template** tab.
    - o Notice that the **Report Name** is displayed at the top.
    - o 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.

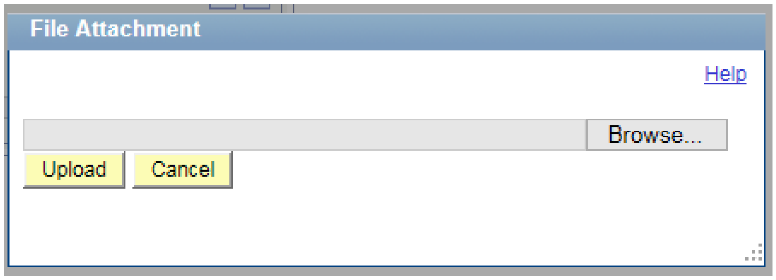


- **Default Template**: Should be checked.
- **Description**: Enter a description for the Template (there is a 30-character limit).
- **Language Code**: Leave as **English**.
- **Channel**: Leave blank.
- **Effective Date**: Defaults to today's date. This can be changed. Leave as is.
- **Status**: Change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

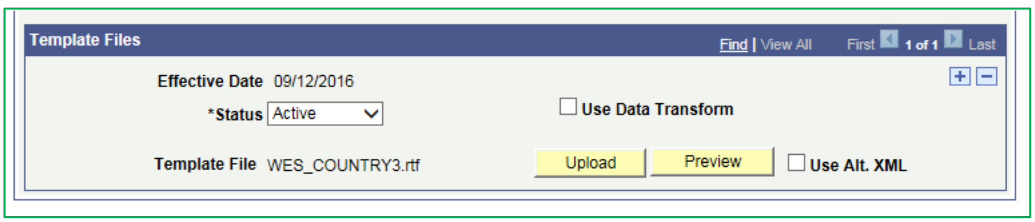


- Upload the **RTF Template** by clicking on the yellow **Upload** button (Note: In Internet Explorer, you may need to hold down the CTRL key at the same time).

- 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.
- Once you have uploaded the template RTF file, you will see the following at the bottom of the page, in the **Template Files** section. The **Template File** name of **WES_COUNTRY3.rtf** is listed.



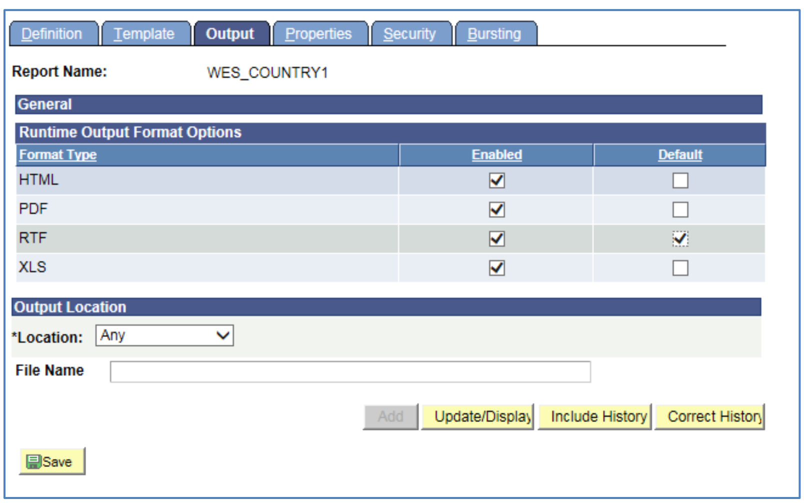
- You can run a Preview at this point, which will be similar to the PDF previews you saw before, i.e. it will contain sample data and it will not display the Conditional Formatting that you created.
- This Preview, however, is an RTF file.
- The beginning of the RTF file resembles this:

BI Publisher Template Example 3
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

- o Close the Preview.

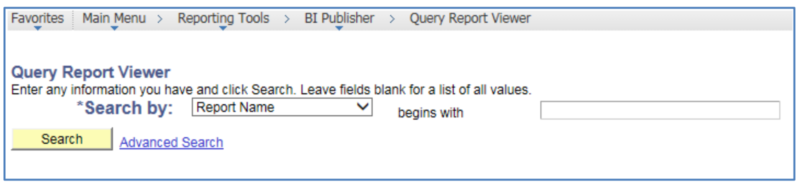
- Click on the **Output** tab. Change the **Default** to **RTF**.



- 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**. If you are familiar with those processes, you can proceed with that section as well.
- 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.



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

- 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. ***Be sure to give it a new name.***
- The entire first page (1 of 8) resembles the following. You will recall that when you set up the **Conditional Formatting** you did not check the box for the Conditional Formatting to **Apply to Entire Table Row**, and you can observe that in the report.

BI Publisher Template Example 3
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

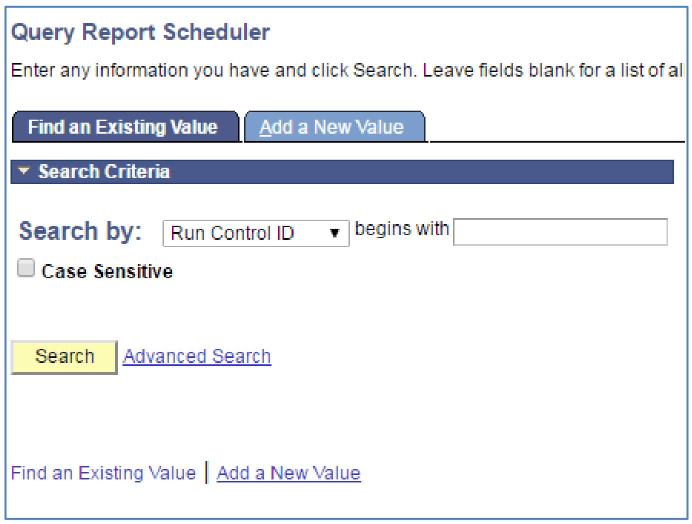
B	3 Char. Code	2 Char.Code	Eu Member State
Bahamas	BHS	BS	N
Bahrain	BHR	BH	N
Bangladesh	BGD	BD	N
Barbados	BRB	BB	N
Belarus	BLR	BY	N
Belgium	BEL	BE	Y
Belize	BLZ	BZ	N
Benin	BEN	BJ	N
Bermuda	BMU	BM	N
Bhutan	BTN	BT	N
Bolivia	BOL	BO	N
Bonaire, Saint Eustatius &Saba	BES	BQ	N
Bosnia and Herzegovina	BIH	BA	N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

WES_COUNTRY3.rtf Page 1 of 8

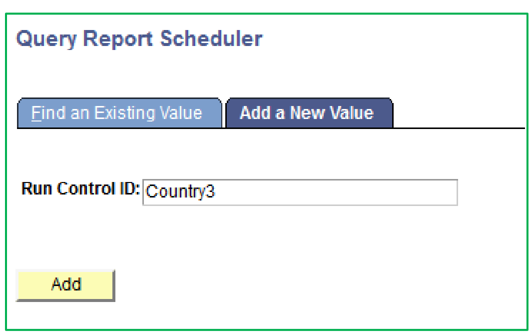
- **Save** a copy of the report by doing a Save As an RTF file.
  - ***Be sure to use a new name.***
  - You can use it as an RTF file or save the RTF file as a Word Document. Once you have saved it you can use it as you would any other Word document.
- At any time you can go back into the **Template** 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***

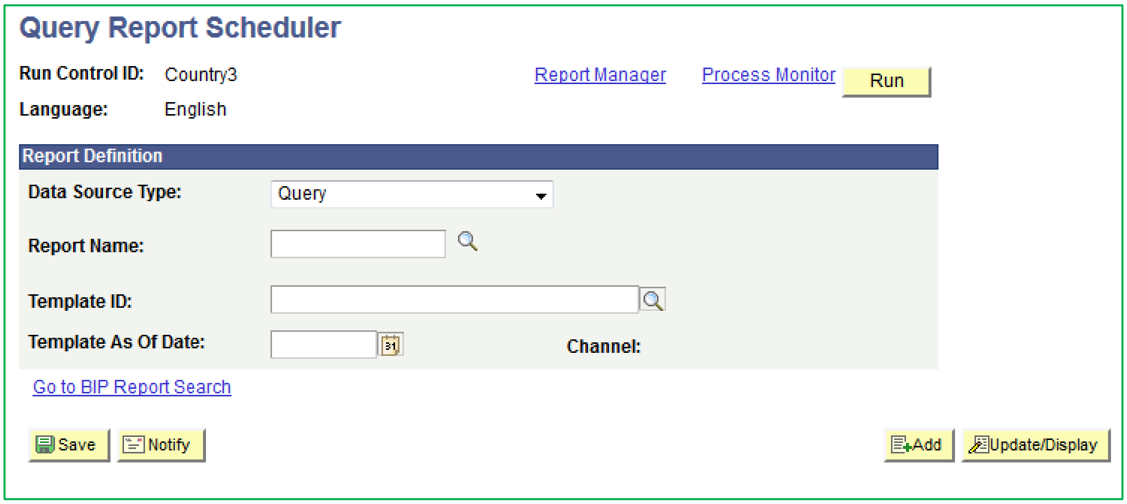


- **Sending the report as an email:**
  - Since this Report has not yet been run through the **Query Report Scheduler**, you will need to set up a **Run Control ID**.
    - Click on the **Add a New Value Tab**

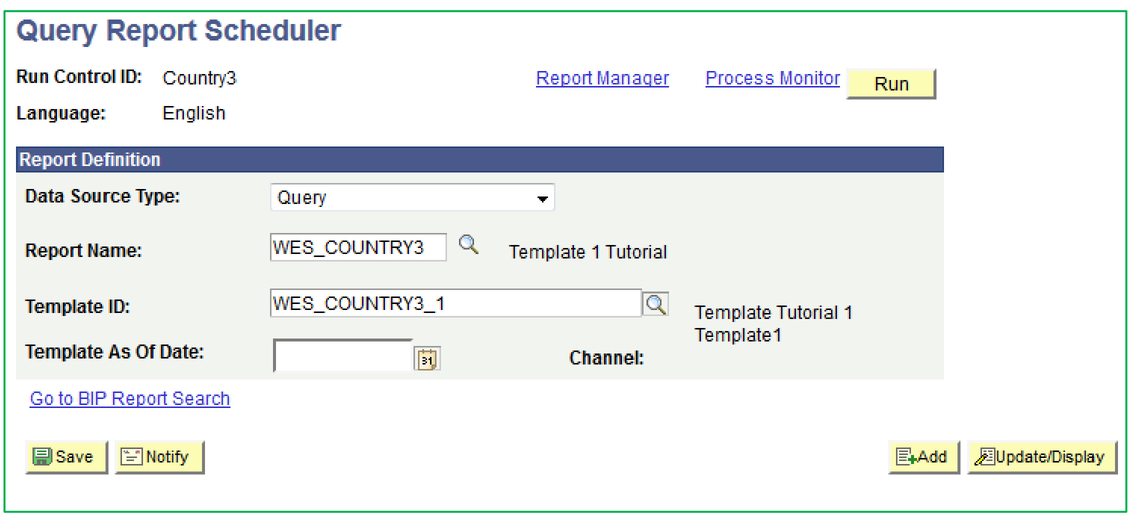


    - Type in a new **Run Control ID** and click the **Add** button.

- The following page opens:

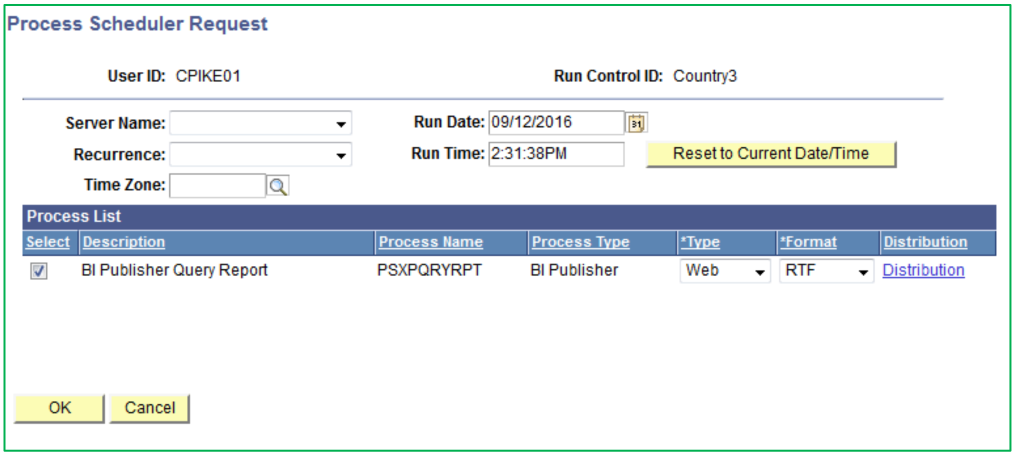


- Populate the fields as follows:
  - **Data Source Type**: The default should be **Query**. If it is not, change it to **Query**.
  - **Report Name**: You can search for or enter the entire name.
  - **Template ID**: If there is just one **Template**, this field will fill in automatically based on the **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. Otherwise, you can leave blank.
- Click on **Save** to save this **Run Control**

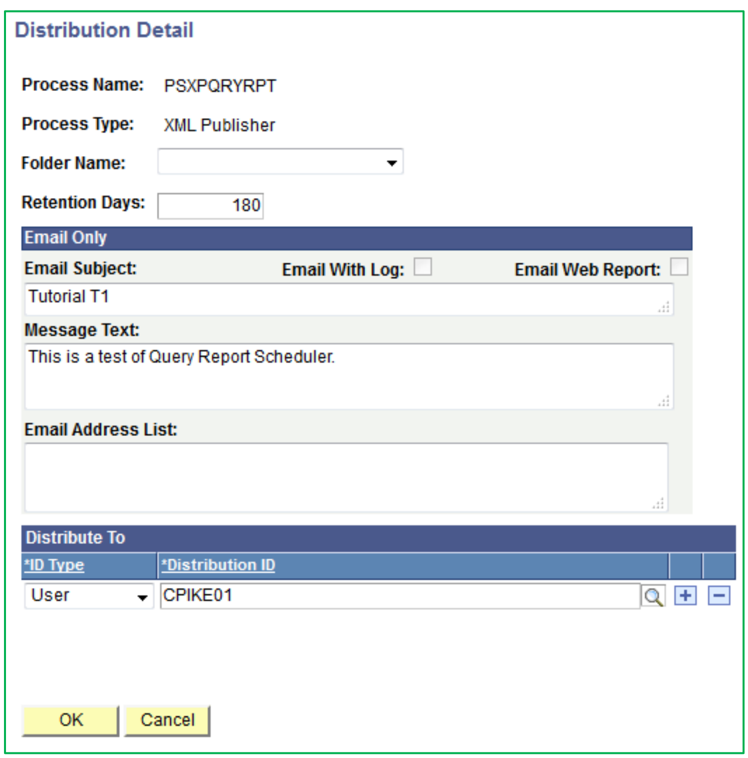


- Click on **Run**

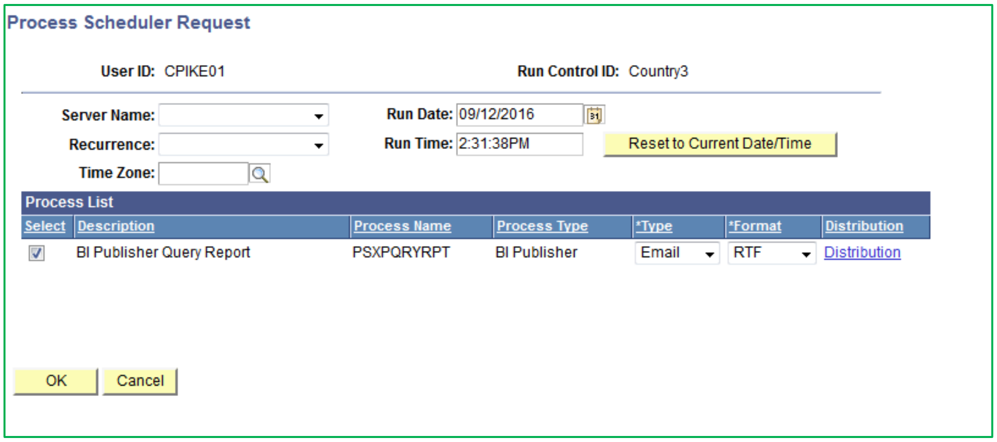
- The **Process Scheduler Request** page opens:



- 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 opens. It defaults to your name as the **User**. You can add other recipients where indicated.
  - You can also enter a subject line and a message if you wish.



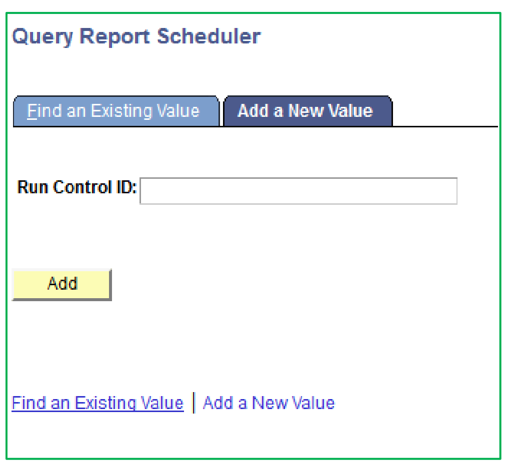
- Click **OK** to return to the **Process Scheduler Request** page. Then click **OK** on that page.



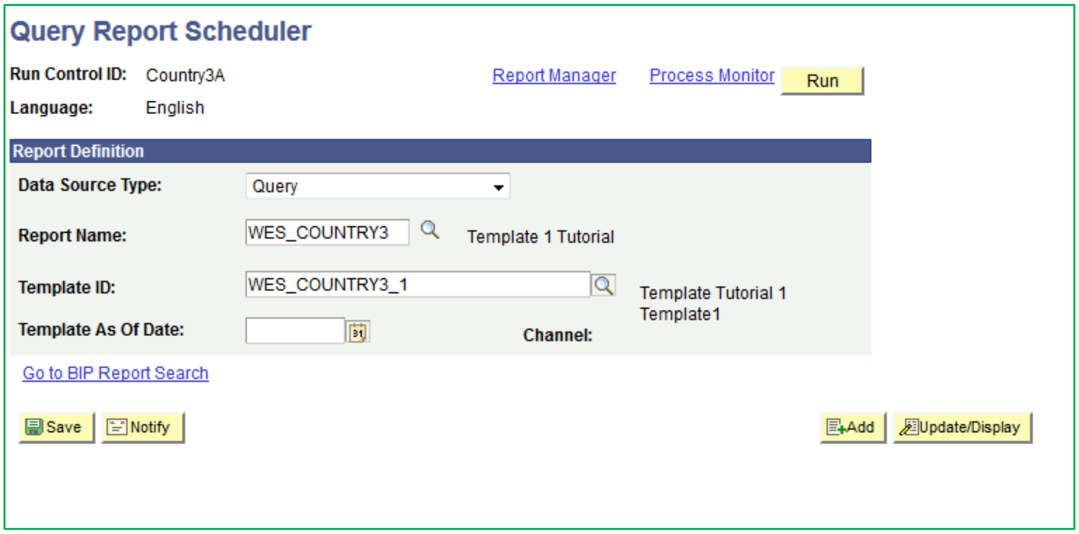
- When you are returned to the **Query Report Scheduler** page, click **Save** again to save the changes for the **Run Control**.
- Then **Run** as you would any Process Scheduler process until the **Run Status** is at **Success** and **Distribution Status** is at **Posted**.
- ***You should shortly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

• Report Manager:

- On the **Query Report Scheduler** page, set up a **Run Control ID**.

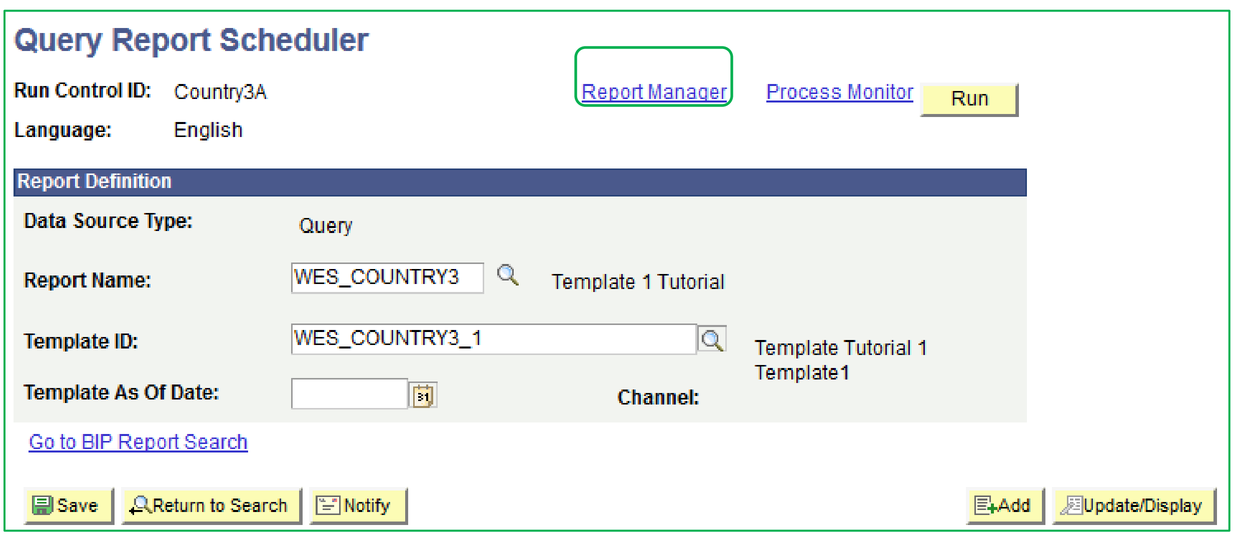


  - Click on the **Add a New Value Tab.** Create a new **Run Control ID**.
  - Populate the fields as previously shown.

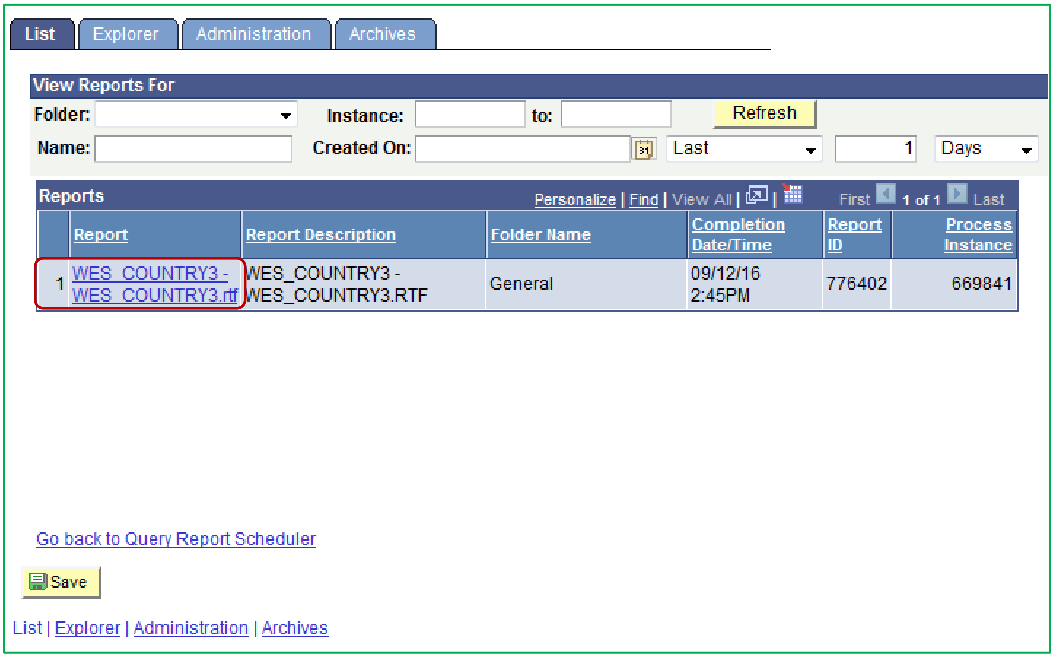


- Click on **Save** to save this **Run Control**.
- Click on **Run**

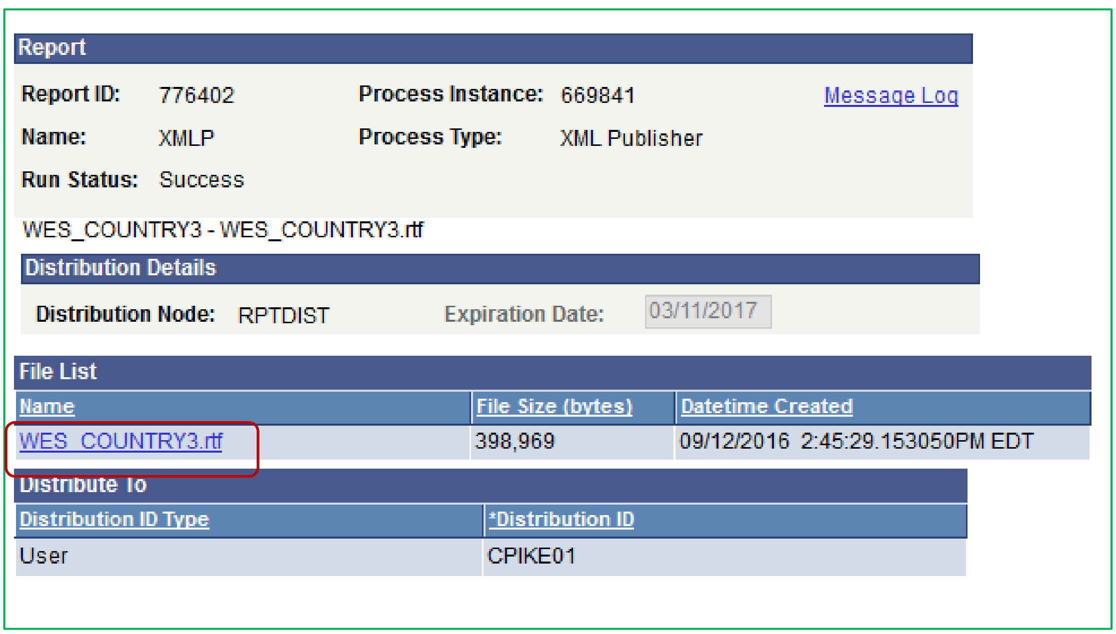
- Click on **OK** and then on **Process Monitor**. Run as you would any Process Scheduler process.
- Once the **Run Status** is at **Success** and **Distribution Status** is at **Posted**, click on the link **Go back to Query Report Scheduler**.



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



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



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

This concludes Lesson T1.