

BI Publisher for PeopleSoft BI Publisher for PeopleSoft 8.55.

Enhancements in this release include:

- Changing report definition data sources.
- Copying report definitions.
- Deleting report definitions.
- Emailing reports to external users
- Including external attachments with reports.
- Using submittable PDF reports.
- BI Publisher Report User role.
- Sharing private BI Publisher reports.

1. Changing Report Definition Data Sources

- a. Beginning this release you can change the data source of an existing report definition.
- b. The Report Definition – Definition page features a Change Data Source control.
- c. When a user clicks the link the Data Source Type and Data Source ID field become editable.
- d. An option to cancel data source changes is available, allowing a report developer to revert back to initial state.

2. Copying Report Definitions

- a. PeopleTools delivers a Copy Report Definition page that simplifies report development, by enabling report developers to copy report definitions.

3. Deleting Report Definition

- a. Report developers can delete report definitions from the results grid of the Report Definition search page.

4. Emailing Reports to External Users

- a. PeopleTools enables you to distribute reports using email to recipients that do not have PeopleSoft user profiles.
- b. This feature enables you to distribute bursted and non-bursted BI Publisher reports to external users whose email addresses are stored in the database, file server, or other location.

5. Including External Attachments with Reports

- a. PeopleTools enables you to include attachments from external sources with BI Publisher PDF report output.
- b. The source attachments are converted to PDF format and then merged with the main report. The report is then displayed to the end users or delivered to Report Manager.
- c. To convert attachments to PDF output, BI Publisher utilizes Oracle's Outside In Technology (OIT), a product that enables the transformation and control of more than 600 file formats, including documents from office suites, specialty formats, and legacy files
- d. This feature is available for any BI Publisher report with PDF output. The following template types are supported: RTF templates, PDF templates, and XSL templates.

6. Using Submittable PDF Reports

- a. BI Publisher for PeopleSoft enables you to develop PDF reports that users can edit and then submit the changes to be saved in a database.
- b. The submittable PDF report functionality is available for delivered self-service reports and for customer-created reports.
- c. Only reports generated from PDF templates can be used as submittable reports.

7. BI Publisher Report User Role

- a. PeopleTools has created a BI Publisher report user role, XMLP Report User, that allows users to schedule and run reports.
- b. Users with this role can also open a majority of BI Publisher report definitions in read-only mode.
- c. A new permission list, PTPT5300, is assigned to this new role.

8. Sharing Private BI Publisher Reports

- a. A new BI Publisher property, `psxp_private_report_access`, has been introduced to allow the sharing of a private report, so that it may be run by other users who have a private query that shares the same name as the private query data source associated with the report.
- b. Note that Report Category permissions are enforced so that only those users who have at least read-only permissions to the report can share it.
- c. Users can set the property at both the global and report definition level.