Agenda

PeopleTools BI Publisher

1-Day Course

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BI Publisher

Designed for developers, analysts, and system administrators, this comprehensive training program provides an in-depth introduction to PeopleSoft's BI Publisher reporting tool. Through real-world scenarios and hands-on exercises, participants will learn to create new reports, leveraging BI Publisher's capabilities to generate dynamic, data-driven reports. The course covers setting up BI Publisher, managing permissions, configuring Report Manager, and defining report categories. By the end of the training, participants will be equipped to effectively utilize BI Publisher for robust reporting solutions within the PeopleSoft environment.

Prerequisites:

- General Knowledge of Relational Database System
- PeopleTools Knowledge

PeopleSoft BI Publisher (BIP) Overview

- What is BI Publisher?
- BI Publisher Phases
- Optional Features

Setting Up BI Publisher

- BI Publisher Permissions
- Setting Up Report Manager
- Defining Report Categories
- Downloading Design Plug-ins

Creating and Registering Data Sources

- BI Publisher Data Sources
- Creating Query-based Data Sources
- Creating and Registering XML File Data Sources

Creating Templates

- Template Types
- Creating an RTF Template
- Using the Table Wizard
- Using a Pivot Table
- Working with PDF Templates
- Setting up PDF's

Defining BI Publisher Reports

- Creating Report Definitions
- Associating Templates
- Defining the Report Output
- Setting up Report properties
- Setting up Report Viewing security
- Creating Report Definition Based on PDF Templates
- Using Digital Signature in PDF reports
- Bursting Reports
- Copying Report Definitions

Running and Viewing Query-based BI Publisher reports

- Running reports in the Query Report Viewer
- Scheduling PS Query Reports
- Locating and Viewing BI Publisher Reports
- Emailing BI Publisher reports to External Users
- Include External Attachments with BI Publisher Reports

Working with Sub-Templates

- Creating Reusable Sub-templates
- Using Content Library

Using Rich Text in BI Publisher

- Using RTE in BI Publisher Reports

Using Common Template's in BI Publisher

- What are Common Templates?
- Creating a Report Definition using Common Template
- What is an Oracle XSL Mapper?

Appendix A – Additional RTF Techniques

Recommended Courses

- Application Engine
- SQL/SQR
- Query Advanced