



BI Publisher Reports 9.2 PT 8.59

Version Date: September 6, 2023

Training Guide
BI Publisher Reports 9.2 PT 8.59

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BI Publisher Reports 9.2 PT 8.59

BI Publisher Reports in PeopleSoft Financials provides users an opportunity to report on Budget and Actual information from journals or ledger tables. Users may run reports on departmental, fund, project, and even PI related revenue and expenses. Oracle delivers two methods for users to run their BI Publisher Reports, Query Report Scheduler and Query Report Viewer. Users may choose to run their reports to a PDF or to an Excel spreadsheet. This document details the steps to run a report via BI Query Report Scheduler and the steps to run a report via BI Query Report Viewer.

Below, is a listing of the **LSUHSC BI Publisher Custom Reports**. BI Publisher Report names have a maximum length of 10. The BI Report Description provides a brief description of the report's use. All of the reports are available in the PS9FSRPT database and certain ones as designated in the list are also available in PS9FSPRD.

BI Publisher Reports List for Web Page (Revised 5/2023) All listed reports are available in PS9FSRPT			
REPORT NAME	BI Report Description	Units eligible to run the report	Available in PRD
ZZGLX004	Trans Detail - Date Range	NO and SHR	
ZZGLX005	Project Approp Budget Journals	All campuses	
ZZGLX006	HCSO Project Budget Report by Fund	All campuses	
ZZGLX007	HCSO Project Grant Budget Journals	All campuses	
ZZGLX008	Journal Line Detail Report	All campuses	
ZZGLX009	Project Grant Budgets for a Business Unit	All campuses	Yes
ZZGLX010	Summary Drilldown - Date Range	NO and SHR	
ZZGLX011	Project Master Budget Journals	All campuses	Yes
ZZGLX012	HCSO Project Summary Budget Report by Fund	All campuses	Yes
ZZGLX013	HCSO All Projects Budget Report	All campuses	Yes
ZZGLX014	HCSO Approp by Business Unit	HCSO units	
ZZGLX015	HCSO Single Project Budget Report	All campuses	Yes
ZZGLX016	HCSO_PROJ_MASTER_BUDGET_TO_EXP_COMPARE	All campuses	Yes
ZZGLX017	HCSO MGT JOURNAL SYS INFO by OPRID	HCSO units	
ZZGLX018	HCSO MGT JOURNAL SYS INFO	All campuses	
ZZGLX019	BUDGET Journal Line Detail Report	All campuses	
ZZGLX020	HCSO Org Budget Exceptions Report - Count	All campuses	
ZZGLX021	MGT SUMMARY - ALL GROUPS	NO and SHR	
ZZGLX022	MGT SUMMARY - PI_DEPT - PI Prompt	NO and SHR	
ZZGLX023	HCSO Org Budget Exceptions Report	All campuses	Yes

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ZZGLX024	HCSO Org Budget Report	All campuses	Yes
ZZGLX025	Org Budget Report By Category	All campuses	Yes
ZZGLX026	Org Budget Report By Ctgy Total	All campuses	Yes
ZZGLX027	SUMMARY - DEPARTMENT EXP ROLLUP	All campuses	
ZZGLX028	BU Summary- PROJ_DEPT-PI Prompt	NO and SHR	
ZZGLX029	Actuals Summary	All campuses	
ZZGLX030	MGt Summary - Fund 111	All campuses	
ZZGLX031	HCSO Inventory Issues by Department Detail	HCSO units	
ZZGLX032	HCSO Inventory Issues by Department Summary	HCSO units	
ZZGLX033	HCSO Inventory Journal Line Detail Report	HCSO units	
ZZGLX034	Monthly Journal Detail by Chartstring	All campuses	
ZZGLX035	HCSO Inventory Adjustments by Department Detail	HCSO units	
ZZGLX036	HCSO Inventory Adjustments by Department Summary	HCSO units	
ZZGLX037	Summary Report - Major Divisions	NO and SHR	
ZZGLX038	Functional Summary Rp-by Fund	NO and SHR	
ZZGLX039	Accounting Summary Rp- Fund113	NO and SHR	
ZZGLX040	Journal Report Accruals	HCSO units	
ZZGLX041	MGT Summary all Funds Test	All campuses	
ZZGLX042	NO MGT SUMMARY - by DEPARTMENT	All campuses	
ZZGLX045	MultiYear Dept Summary	All campuses	
ZZGLX046	HCSO Approp by Fund	HCSO units	
ZZGLX047	HCSO Org Budget Report By CategoryTotal	HCSO units	
ZZGLX048	HCSO Restr Fund Approp by BU	HCSO units	
ZZGLX049	HCSO RF Approp by Fund.rpt	HCSO units	
ZZGLX050	Transaction Detail - Periods	NO and SHR	
ZZGLX051	MGT Inventory Journal Info	HCSO units	
ZZGLX052	HCSO MGT ACCRUAL LEDGER JOURNAL INFO	HCSO units	
ZZGLX053	HCSO MGT JOURNAL SYS INFO APCNX	HCSO units	
ZZGLX054	HCSO MGT JOURNAL SYS INFO APCLS	HCSO units	
ZZGLX055	SHR MGT SUMMARY - Sum Exp by Dept (111,114, 115)	LSUSH	
ZZGLX056	MGT SUMMARY - Budget Bal by Direct Expenses	NO and SHR	
ZZGLX057	Summary Expense Report Direct vs Indirect Cost	NO and SHR	
ZZGLX058	Summary - PROJ_DEPT Active	NO and SHR	
ZZGLX059	Summary Projections	NO and SHR	
ZZGLX060	SHR Trans Detail EE ID Pr	LSUSH	
ZZGLX061	TransDetail Report Expenses	All campuses	
ZZGLX062	BUDGET Journal Line Detail Report	All campuses	Yes
ZZGLX063	Trans Dtl by Jrnl Date Product Incl	All campuses	
ZZGLX064	Trans Dtl by Chartst with Product	All campuses	
ZZGLX065	BU SUMMARY RPT - ALL GROUPS PRODUCT	NO and SHR	

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ZZGLX066	Project Transaction Detail	All campuses	
ZZGLX067	HR Journal Detail Trans by Date Range	All campuses	
ZZGLX068	HR Adjustment Journal Detail Trans by Date Range	All campuses	
ZZGLX069	IT Division Journal Details	All campuses	
ZZGLX070	TransDetail with Account	All campuses	
ZZGLX071	BU SUMMARY RPT - with Account Prompt	NO and SHR	
ZZGLX072	Account Balance Report Prompt	All campuses	
ZZAMX003	ZZBIP_HCSD_DIS_LINE_TABLE	HCSD units	
ZZAMX004	ZZBIP_HCSD_ASSET_FEMA_NBV	HCSD units	
ZZAMX005	ZZBIP_HCSD_ASSET_FEMA_NBV	HCSD units	

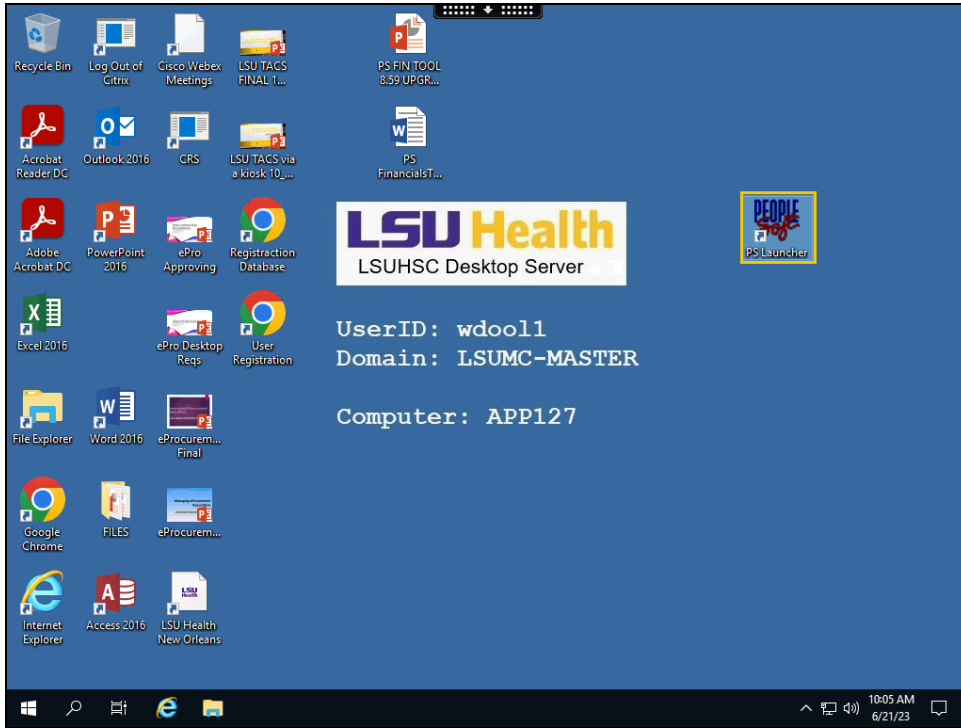
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Launch PeopleSoft 9.2 PT. 8.59

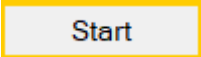
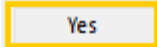
Procedure

In this topic you will learn how to **Launch PeopleSoft 9.2 PT. 8.59**.



Step	Action
1.	<p>Double-click the PS Launcher button.</p> 
2.	<p>If the PeopleSoft System is not Financials, click the drop-down button to the right of the field and select it.</p> <p>You must access BI Publisher Reports through the PeopleSoft Financials system Reports database except for the reports listed as available in PRD.</p> <p>Click the button to the right of the Database field.</p> 
3.	<p>Click the PS 9.2 Financials Reports (PS9FSRPT) list item.</p> 

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Step	Action
4.	Click the Start button. 
5.	Anytime you enter a non-production database (RPT, SND, TRN, etc.), a warning message displays stating this is a non-production database and any information entered into the database will be lost. Click the Yes button. 
6.	This completes <i>Launch PeopleSoft 9.2 PT. 8.59</i> . End of Procedure.

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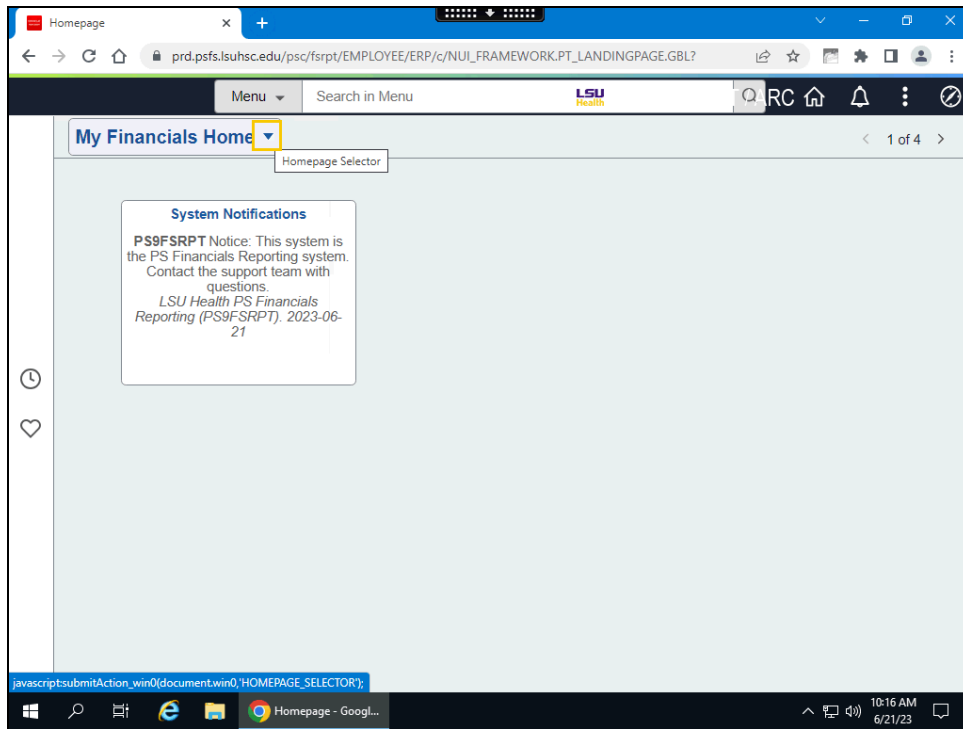
BI Publisher Reports 9.2 PT 8.59



BI Publisher Query Report Viewer




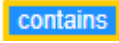
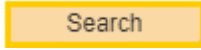

Procedure

In this topic you will learn how to run **BI Publisher Query Report Viewer**.

Step	Action
1.	<i>NOTE: BI Publisher Query Report Viewer provides the user an opportunity to run the report to your window in either PDF or XLS format. This option does not run the report via the process scheduler. BI Publisher Query Report Viewer is best used for smaller data output reports such as for a single project.</i>

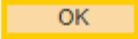




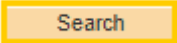

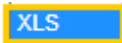
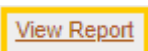


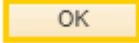

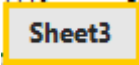
Step	Action
2.	Click the button to the right of the Homepage field. 
3.	Click the LSU Health Reporting link. 
4.	Click the BI Publisher button.

Step	Action
5.	Click the BIP Query Report Viewer link. 
6.	The Search by default option is <i>Report Name</i> . All of the LSUHSC reports as noted in the table at the beginning of the document begin with the letters "ZZ". You may search by entering 'zz' into the selection box. However, in the exercise you will use the Advanced Search for a report by report description. Click the Advanced Search link. 
7.	Click the button to the right of the Description field. 
8.	Click the contains list item. 
9.	For this example, the report desired is the one that displays Direct Expenses Balances Available . Enter the desired information into the Description field. Enter " direct ".
10.	Click the Search button. 
11.	The search results return one report that has a description that includes the word "direct", ZZGLX056 . The default format to view the report is PDF. By choosing the drop-down arrow, you might opt to view the report in XLS format instead. In this example, do not change the format from PDF.
12.	Click the View Report link. 
13.	A pop-up window displays on the screen where you must enter the prompt parameters that you would like to include in the report. Enter the desired information into the Business Unit field. Enter " LSUNO ". <i>NOTE: Shreveport users should use the LSUSH Business Unit when running this example in RPT or SND. However, if you are using the WBT, the LSUNO Business Unit <u>must</u> be used.</i>
14.	Enter the desired information into the Department field. Enter " 1055000 ".
15.	Enter the desired information into the Fund Code field. Enter "%".
16.	Enter the desired information into the Program Code field. Enter "%".
17.	Enter the desired information into the Class Field field. Enter "%".

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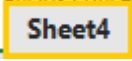

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Step	Action
18.	Enter the desired information into the Project field. Enter "%".
19.	Enter the desired information into the Accounting Period field. Enter "12".
20.	Enter the desired information into the Fiscal Year field. Enter "2023".
21.	Click the OK button. 
22.	Your report displays. You may print the report if desired and/or download and save it to a network pathway by selecting either the Printer icon or the Down Arrow to download... Click the Print File button. 
23.	Click the Close tab. 
24.	Click the Close button for the blank processing window. 
25.	Click the BIP Query Report Viewer link. 
26.	In this example, you will run a BI Publisher Query Report to XLS. Enter the desired information into the Search by field. Enter "ZZGLX004".
27.	Click the Search button. 
28.	Click the button to the right of the Format field. 
29.	Click the XLS list item. 
30.	Click the View Report link. 

Step	Action
31.	<p>The window for the prompt parameters displays.</p> <p>Enter the desired information into the GL Business Unit field. Enter "LSUNO".</p> <p><i>NOTE: Shreveport users should use the LSUSH Business Unit when running this example in RPT or SND. However, if you are using the WBT, the LSUNO Business Unit <u>must</u> be used.</i></p>
32.	Enter the desired information into the Department field. Enter " 1055000 ".
33.	Enter the desired information into the Fund Code field. Enter "%".
34.	Enter the desired information into the Program Code field. Enter "%".
35.	Enter the desired information into the Class Field field. Enter "%".
36.	Enter the desired information into the Project field. Enter "%".
37.	Enter the desired information into the *Journal Date From field. Enter " 01012023 ".
38.	Enter the desired information into the *To Journal Date field. Enter " 06302023 ".
39.	<p>Click the OK button.</p> 
40.	<p><i>NOTE: The "Protected View" defaults for the Excel files. To print, edit or save the Excel file, you must select the Enable Editing button at the top of the screen.</i></p> <p>Data result values are displayed in the XLS output. There are no formulas included in the report results. To perform any additional analysis and calculations in the Excel reports, you would need to enter formulas to perform the desired operations.</p> <p>Click the Sheet 2 tab.</p> 
41.	<p>Please note that the example spreadsheet includes multiple worksheet tabs. Every report may have different grouping structures such as by chartstring, journal ID, department, or by Fund Code. The report results will be grouped by the structure and produce the amount of worksheet tabs required for all report results meeting the grouping criteria. Please note the highlighted grouping on row 7.</p> <p>Click the Sheet 3 tab.</p> 

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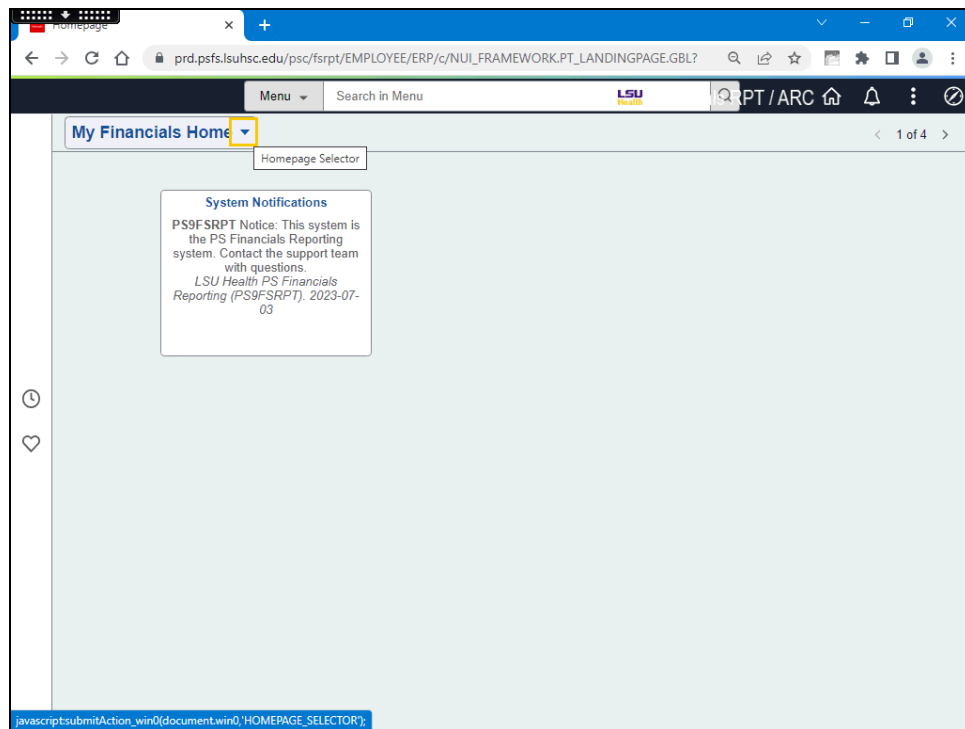
Step	Action
42.	<p>Each tab represents the grouping of chartstring information displayed on the spreadsheet. The number of tabs will vary based upon the prompt criteria entered when running the report, the grouping methodology of the particular report, as well as the volume of data for the prompted entries.</p> <p>Click the Sheet 4 tab.</p> 
43.	<p>You may close the spreadsheet by selecting File, Close from the Excel menu, or selecting the innermost X in the top right corner of the spreadsheet page. To close Excel completely, select the top X.</p> <p>Click the Close tab.</p> 
44.	<p>This completes <i>BI Publisher Query Report Viewer</i>. End of Procedure.</p>



BI Publisher Query Report Scheduler

The Query Report Scheduler is used to run a report via the Process Scheduler. The BI Query Report Scheduler is recommended for larger volumes of data. You may choose to run the report to Window, Web (Report Manager), Email, or Print. PDF is the default output format for the BI Publisher but, when using the BI Publisher Query Report Scheduler, you may opt to run the report to Excel.

Procedure

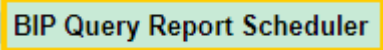

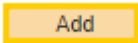



In this topic you will learn how to run **BI Publisher Query Report Scheduler**.

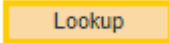

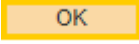
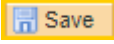



Step	Action
1.	Click the button to the right of the Homepage field. 
2.	Click the LSU Health Reporting link. 
3.	Click the BI Publisher button.

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


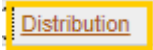
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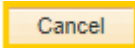





Step	Action
4.	<p>Click the BIP Query Report Scheduler link.</p> 
5.	<p><i>NOTE: In this example, you will create the Run Control ID BAL_DIR_EXP_1.</i></p> <p>Click the Add a New Value tab.</p> 
6.	<p>A Run Control cannot contain any blank spaced or special characters, but an <u>underscore</u> can be used to link words together. Your Run Control should not be more than 30 characters in length.</p> <p><u>The Run Control name should be meaningful to you for running the report.</u> For example, if you want to run the Transaction Detail Report for Shreveport by Date Range, the Run Control ID might be called TRANS_DTL_DATERNG_ZZGLX004 or TRNS_DTL_DATES_WANDA_WEEKLY, etc.</p> <p>After creating a Run Control for a particular report, the next time that you log in to run that same report, you may reuse the Run Control.</p>
7.	<p>In this exercise, a sample Run Control ID is provided for you.</p> <p>Enter the desired information into the Run Control ID field. Enter "BAL_DIR_EXP_1".</p>
8.	<p>Click the Add button.</p> 
9.	<p>Click the button to the right of the Data Source Type field.</p> 
10.	<p>The Data Source Type will always be Query.</p> <p>Click the Query list item.</p> 
11.	<p>Use the Look up Report Definitions to search for and select a report.</p> <p>Click the Look up Report Definitions button.</p> 
12.	<p>You may scroll through the list or use the Advanced Search link to search by description for the desired report. In this example, you will use a wildcard (%) and the Lookup options to locate report ZZGLX056.</p> <p>Enter the desired information into the begins with field. Enter "%X056".</p>

Step	Action
13.	Click the Lookup button. 
14.	Click the ZZGLX056 link. 
15.	A pop-up box displays where you enter the prompt parameters desired for the report. <i>NOTE: The Business Unit must always be entered. The available Business Units are:</i> HCSDA - HCSD Administration LAKMC - Lallie Kemp LSUNO - LSU Health New Orleans LSUSH - LSU Health Shreveport Enter the desired information into the Business Unit field. Enter " LSUSH ".
16.	Enter the desired information into the Department field. Enter " 1651500 ".
17.	Enter the desired information into the Fund Code field. Enter " 111 ".
18.	Enter the desired information into the Program Code field. Enter "%".
19.	Enter the desired information into the Class Field field. Enter "%".
20.	Enter the desired information into the Project field. Enter "%".
21.	Enter the desired information into the Accounting Period field. Enter " 12 ".
22.	Enter the desired information into the Fiscal Year field. Enter " 2023 ".
23.	Click the OK button. 
24.	The Query Report Scheduler page is now populated with the Report Name, Template ID, and the parameters you selected. Click the Save button. 
25.	You can create another Run Control for another report by clicking the Add button at the bottom of the page. Click the <i>Update/Display</i> button to run a report for which a Run Control has already been created.
26.	<i>NOTE: The blue link called Go to BIP Report Search may only be accessed by the Report Development Team. End-users will receive the security message that "You are not authorized to access this component" if the link is selected.</i>
27.	Click the Run button. 

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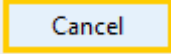


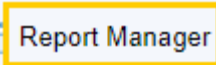

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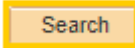
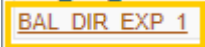

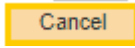




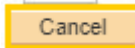
Step	Action
28.	Click the button to the right of the Server Name field. 
29.	Click the PSNT list item. 
30.	Verify that the BI Publisher Query Report is checked.
31.	Click the button to the right of the Type field. 
32.	The Type options are Email, File, Printer, Web, and Window. <ul style="list-style-type: none"> • Email – If you select this option, you must then select the Distribution link and enter the email address for each user to whom you will send the report. • File – DO NOT USE – This would write the report to the process scheduler server where you would be unable to access the file. • Printer – If you choose to send the report directly to the printer, you must then select the Output Destination printer where the report will be directed. • Web – Web is the default option. The report will run and post to the Report Repository Manager within PeopleSoft where you may access the file. • Window – If you choose Window, the report will open a new window and process on the screen (very similar to Window option in nVision). The report will also post to the Report Manager where you may access the data until the repository is cleared.
33.	Click the button to the right of the Format field. 
34.	PDF is the default option, but you may also choose to run the report to XLS format for Excel. <i>NOTE: The HTM and RTF format are for report developers only.</i>
35.	The Distribution link is used to specify the email distribution of your report output if email is the selected Type. Click the Distribution link. 
36.	The Distribution Detail page will be grayed out if email is not the selected Type option. Enter the desired information into the field. Enter " BI REPORT EMAIL EXAMPLE ".
37.	Enter the desired information into the field. Enter " This is the BI Publisher Report we discussed. ".

Step	Action
38.	<p><i>NOTE: If multiple email addresses are entered, make sure the addresses are separated by a comma.</i></p> <p>Enter the desired information into the Email Address List field. Enter "mgonz2@lsuhsc.edu, kocon2@lsuhsc.edu".</p>
39.	<p>If you were emailing this report, you would click the OK button.</p> <p>For training purposes only, click the Cancel button.</p> <p style="text-align: center;"></p>
40.	<p>As previously stated, the Default Type is Web and the Format is PDF. This indicates that the report will produce a PDF file on the Report Repository Manager page for you to access.</p> <p>Click the OK button.</p> <p style="text-align: center;"></p>
41.	<p>You are returned to the Query Report Scheduler page. Notice the Process Instance number is displayed under the Process Monitor link.</p>
42.	<p><i>Please note the link called Update Parameters above the prompt entries. The next time you navigate to Query Report Scheduler for this report, these prompt values will be displayed. By selecting the Update Parameters link, you may modify the prompts to run the report for another department, project, etc.</i></p>
43.	<p>Click the Report Monitor link.</p> <p style="text-align: center;"></p>
44.	<p>You want the Run Status = Success and the Distribution Status = Posted. Click the Refresh button every <i>10 - 15 seconds</i> until the appropriate statuses have been posted.</p> <p>Click the Go back to Query Report Scheduler link.</p> <p style="text-align: center;"></p>
45.	<p>Click the Report Manager link.</p> <p style="text-align: center;"></p>
46.	<p>Click the Administration tab.</p> <p style="text-align: center;"></p>

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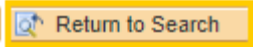
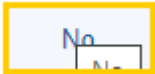
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Step	Action
47.	<p>Your most recently run report will be displayed at the top of the page. You want the Status = Posted. If the Status is not Posted, click the Refresh button every <i>10 - 15 seconds</i> until the status posts.</p> <p>Click the ZZGLX - Budget Balance by Direct Expense.pdf link.</p> <p>ZZGLX056 - Budget Balance by Direct Expense.pdf</p>
48.	<p>You may now save the report to a file, to a network, or local drive. Simply select Down Arrow by hovering in the upper right corner of the screen and select the desired location to save the file.</p> <p>You may print the document. Although many of the reports are created on legal size paper due to the large amount of data included, it is much easier to print the report on letter sized paper in BI Publisher than it was in Crystal Reports.</p> <p>Click the desired object.</p> <p></p>
49.	<p>Simply select the desired paper size, the printer, and then click the Print button.</p> <p>For training purposes only, click the Cancel button.</p> <p></p>
50.	<p>NOTE: After you have completed printing or saving your report, close the report by selecting Close.</p> <p>Click the Close button.</p> <p></p>
51.	<p>Click the Close button.</p> <p></p>
52.	<p>Click the Report Manager link.</p> <p></p>
53.	<p>Click the BIP Query Report Scheduler link.</p> <p></p>

Step	Action
54.	<p>You can rerun a report using the same Run Control ID.</p> <p>Click the Search button.</p> 
55.	<p>Your available Run Control IDs will display at the bottom of the page.</p> <p>Click the BAL_DIR_EXP_1 link.</p> 
56.	<p>You can change your parameters using the Update Parameters link.</p> <p>Click the Update Parameters link.</p> 
57.	<p>You would enter your parameters and save your changes before running your report.</p> <p>For training purposes only, click the Cancel button.</p> 
58.	<p>You can search for another report using the Look Up Report Definitions option.</p> <p>Click the Look Up Report Definitions button.</p> 
59.	<p>Use the Advanced Search option to search for a report by description.</p> <p>Click the Advanced Search link.</p> 
60.	<p>Enter the desired information into the Report Name begins with field. Enter "ZZGLX046".</p>
61.	<p>Click the Lookup button.</p> 
62.	<p>Click the ZZGLX046 link.</p> 
63.	<p>Click the Cancel button.</p> 

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Step	Action
64.	<p>User the Return to Search button to search for and select additional Run Control IDs.</p> <p>Click the Return to Search button.</p> 
65.	<p>Click the No button.</p> 
66.	<p>If your existing Run Control IDs are not displayed, click the Search button to view them or click the Add a New Value tab to create a new Run Control.</p>
67.	<p>In this topic you will learn how to run <i>BI Publisher Query Report Scheduler</i>. End of Procedure.</p>

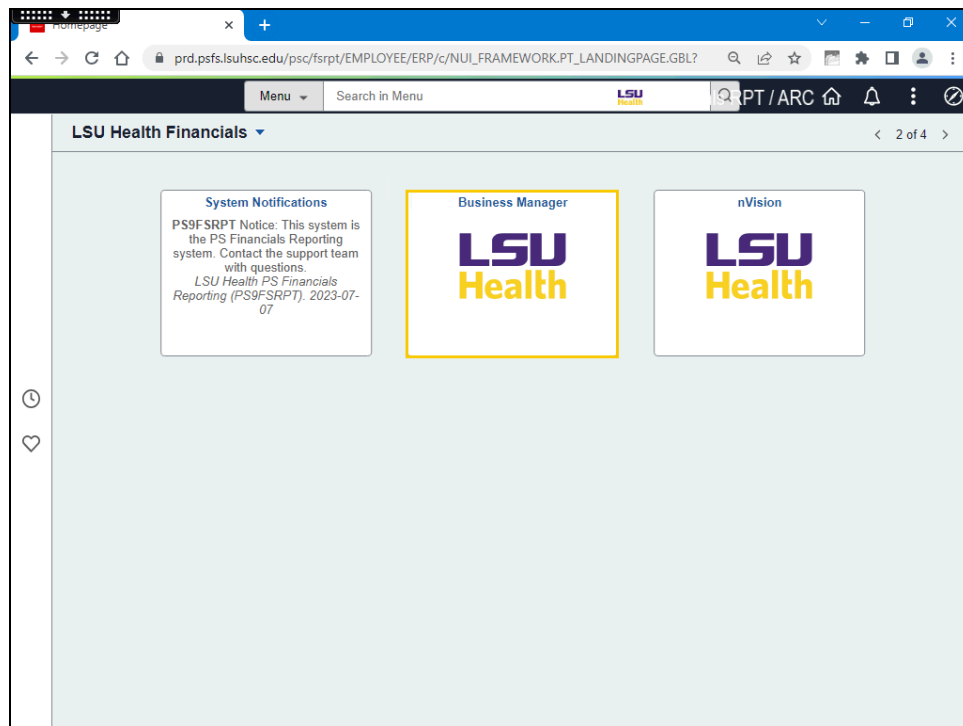
Appendix

Alternative Navigations

Procedure


In this topic you will find alternative navigations to the BI Publisher pages.

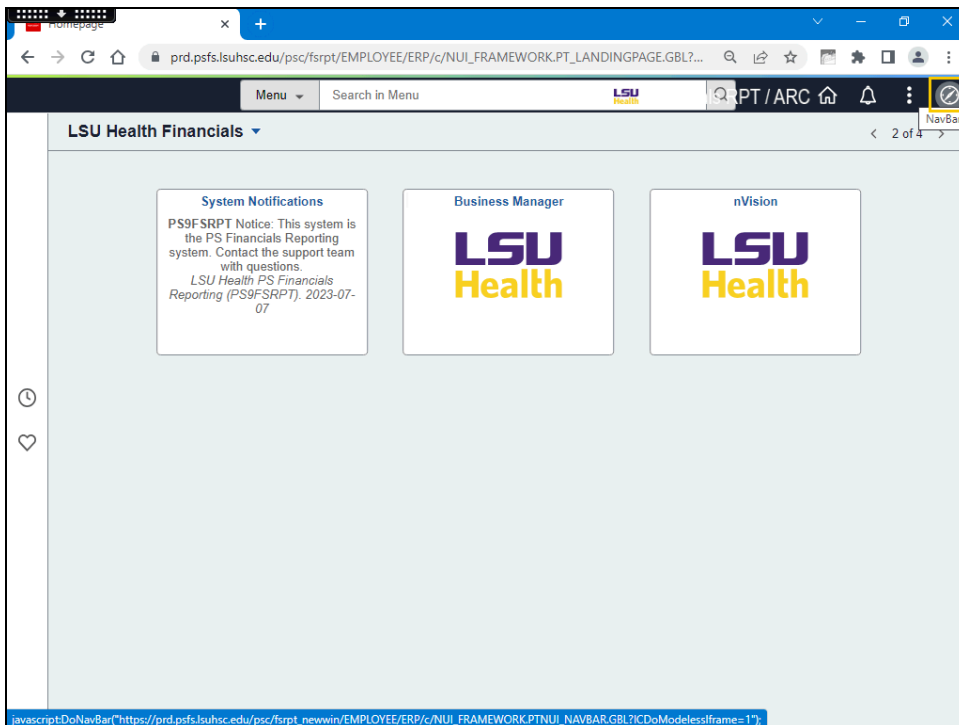
Step	Action
1.	<p><u>Alternative Methods to Navigate to the BI Publisher Report pages</u></p> <p>Users may choose the LSU Health Homepage in PS9FSRPT to quickly navigate to all of the reporting tools available to users. There are other methods that the user may choose to use to navigate to the reporting tool pages that are briefly discussed below.</p>



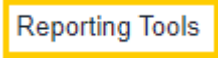



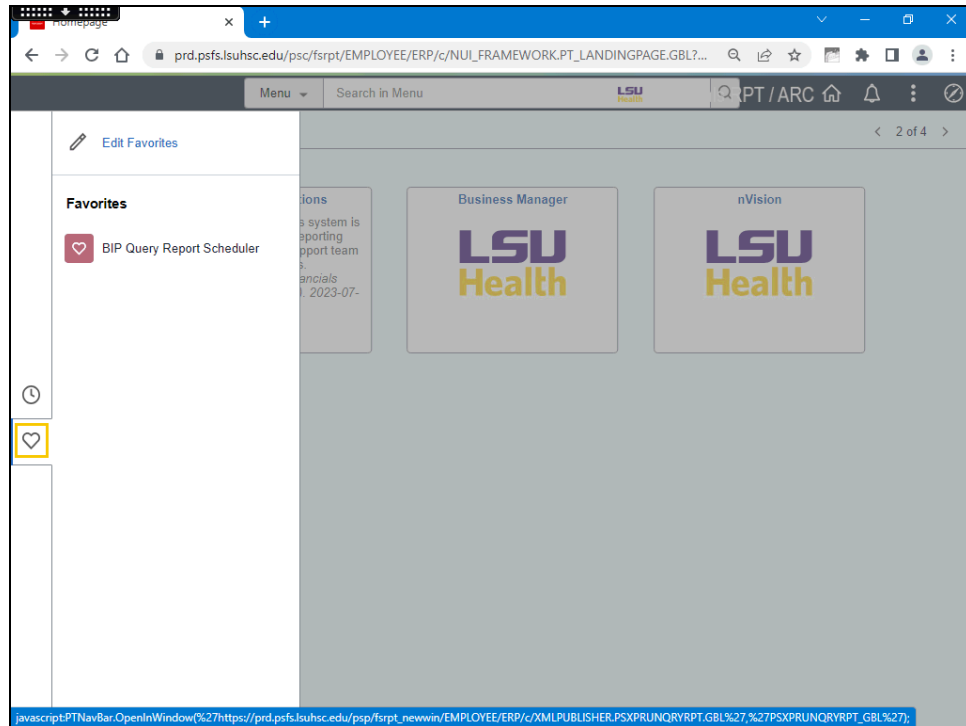
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Step	Action
2.	<p><u>Method 1: Business Managers</u></p> <p>The Business Manager's Security provides access to a tile on the LSU Health Financials Homepage that provides a menu selection to the BI Publisher Reports.</p> <p>Click the Business Manager button.</p>
3.	<p>Click the button to the right of the Reporting field.</p> 
4.	<p>Select the desired reporting link:</p> <p><i>Query Report Viewer - BIP</i></p> <p><i>Query Report Scheduler - BIP</i></p> <p>NOTE: BIP are the BI Publisher report options.</p>




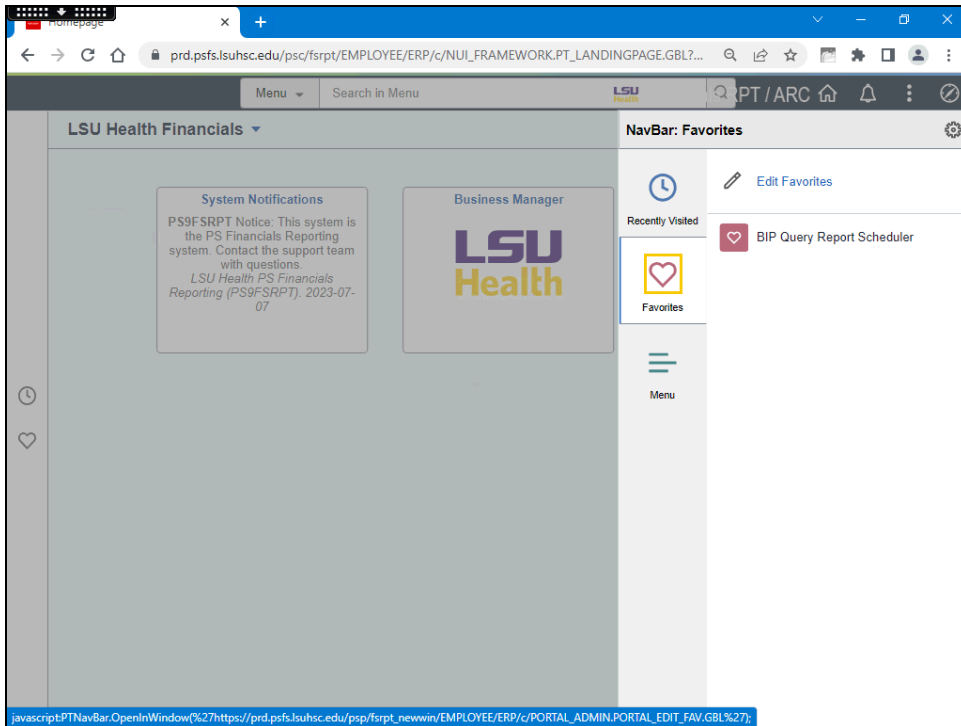
Step	Action
5.	<p>Method 2:</p> <p>Users may choose to navigate from the NavBar Menu (<u>in the upper right corner of the screen</u>).</p> <p>Click the NavBar button.</p> 
6.	<p>Click the Menu link.</p> 
7.	Scroll to the Reporting Tools menu option.
8.	<p>Click the Reporting Tools link.</p> 
9.	<p>Click the BI Publisher link.</p> 
10.	Then select BIP Query Report Scheduler or BIP Query Report Viewer .




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Step	Action
11.	<p>Method 3:</p> <p>Users who have saved the BI Publisher menu option as a Favorite may choose to use the favorite icon to navigate to the desired page.</p> <p>In the left margin of the screen, click the heart.</p> <p>Click the Favorites button.</p> 



Step	Action
12.	<p>Or on the upper right side of the screen, click the NavBar button, then click the heart.</p> <p>Click the Favorites button.</p> 
13.	<p>End of Procedure.</p>

