

# BI Publisher User Guide

As Of: 08-26-2020

BI Publisher is the next generation of Discoverer. It has a more modern “look and feel”. Use the link below to login to BI Publisher. It works best under Chrome so please bookmark it in your Chrome browser:

<http://s-whrptng02.win.root.sonoma.gov:9502/xmlpserver/>



Note: BI Publisher can also be used with Imprivata – the Single Sign-On tool.

Use the same user name and password to login to BI Publisher that you use for Discoverer and eP.

**Sign In**  
Please enter username and password

Username

Password

Accessibility Mode

 English (United States) ▼

## First time login only

When you login for the *first time*, please click the arrow by your user name, then My Account to open your profile, and then set your timezone to PST:

Home    Catalog    New ▼    Open ▼    Signed In As **sdeal** ▼

**General**    My Groups

Report Locale

UI Language

**Time Zone**

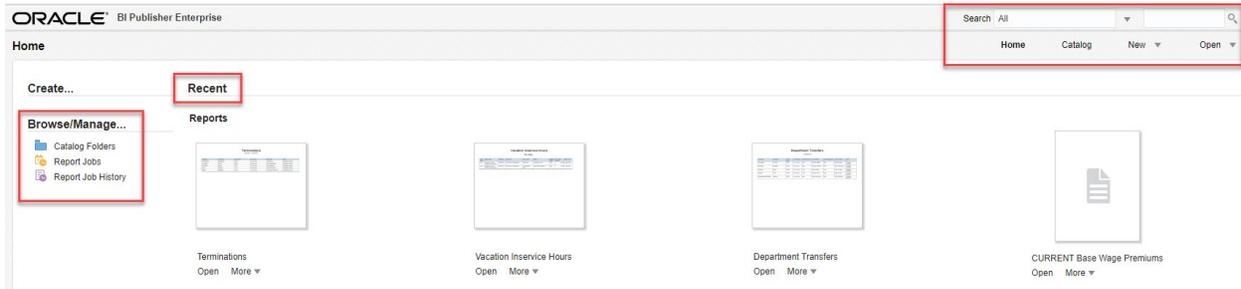
Accessibility Mode     On     Off

Email Addresses

Click 'OK' to save the changes.

## Home Screen

Below is the **Home** screen that is displayed when you first login:



The **Recent** area lists the reports you've recently run. That allows you quick access to run the same report again.

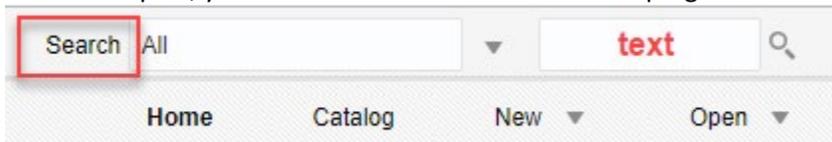
Below the Recent area is a **Favorites** area where you can pin the reports you use most often.



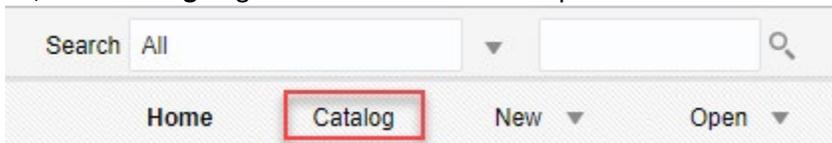
There are several ways to add objects to the Favorites region:

- Locate the report in the catalog, click the **More** link, and then click **Add to Favorites**.
- From the Report Viewer, click the **Actions** menu, and then click **Add to Favorites**.
- Use the **Manage** link on the Home page to add reports.

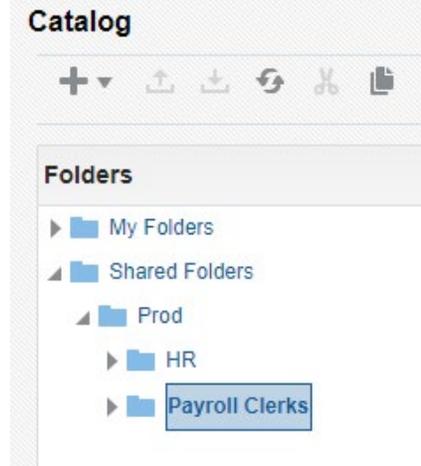
To find a report, you can use the **Search** area at the top right:



Or, click **Catalog** to go to the list of available reports:



The folders listed will be based on your security roles. Here is an example of what a payroll clerk will see:

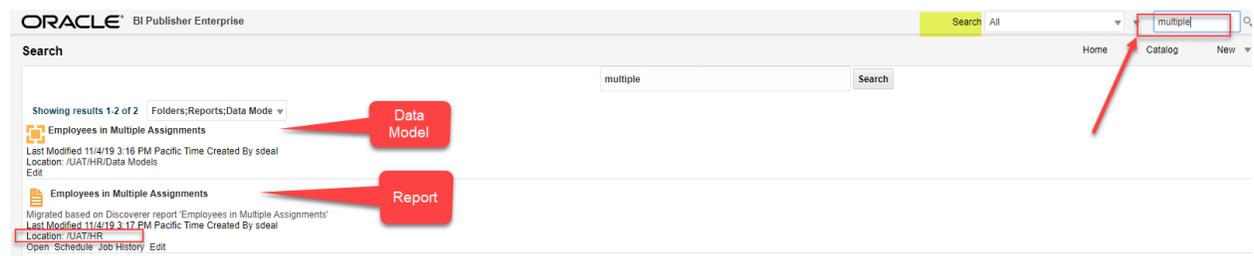


Reports will be located in the folder where it is most applicable. Reports predominantly used by payroll clerks will be located in the Payroll Clerks folder, but some commonly used HR-related reports will be in the HR folder. Examples, are reports for assignments, positions, and leave balances.

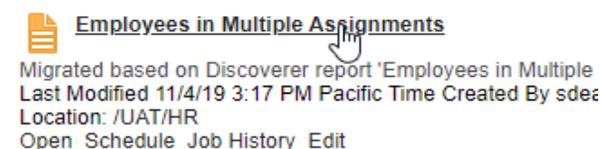
### Icons

As you use BI Publisher you'll see two icons. The  symbol indicates a Report file, and the  symbol is the Data Model for the report. The data model file is used by the report to pull the data. *You do not need to click that file or do anything with it... basically you can ignore that file.* It is only the report file that you will click to run the report. Here is an example of what is returned when you search using word "multiple":

Click the report icon or report title to run the report.



When you hover your mouse on the report title it underlines it and you can then click it to run the report.



Note that the description below the report title may have helpful information:

-  **Employee Assignment Details** Last Modified 12/16/19 10:18 AM Created By sdeal  
General-use report including all active assignments, excluding vendors, volunteers, and retirees. Based on 28 Discoverer reports with a similar scope.  
Open Schedule Jobs Job History Edit More ▾
-  **Allocated Positions** Last Modified 12/19/19 8:19 AM Created By cfonseca  
Lists allocated full-time and part-time positions, filled or vacant, in either a aggregated view (by Department Number) and listing individual positions and employees. 'Positions with Employee Detail', and 24 other Discoverer reports with a similar output.  
Open Schedule Jobs Job History Edit More ▾

**Helpful tip:**

When searching, it will default to searching all areas of Publisher.

**Search**

Showing results 1-7 of 7 Folders;Reports;Data Mode ▾

assignments Search

You can reduce the number of files returned by simply selecting only 'Reports':

**Reports**

- All
- Folders
- Reports
- Data Models
- Style Templates
- Sub Templates

Parameters

When using a report that has parameters, if none of the parameters are required then the report will start running automatically. If any of the parameters are required, or if you want to change what the default value is, be sure to click the Apply button after you enter your parameter in order to run the report with those filters.

**Job Classification Master List**

Job Code [partial]  Entity All FLSA Designation All

Job Title [partial]  Unit All Job Type All **Apply**

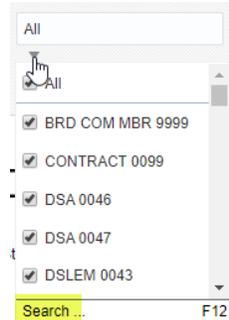
**Job Classification Master List**  
Run Date: 08-Feb-2020

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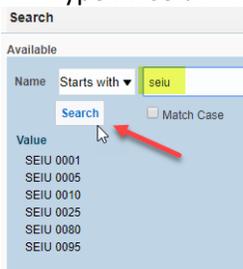
JOB CODE	JOB TITLE	A STEP HOURLY	I STEP HOURLY	A STEP MONTHLY	I STEP MONTHLY	A STEP YEARLY	I STEP YEARLY
VOL-029 MOB COA	A Matter of Balance Coach						
0401-ACCTCLKI	ACCOUNT CLERK I	18.19	22.11	3,163.73	3,845.52	37,964.71	46,146.22
7301-ACCTCLCF	ACCOUNT CLERK I CONFIDENTIAL	18.73	22.76	3,267.66	3,969.67	38,604.76	47,607.86

Some parameters have a long list of values. For those we recommend using the Search option to narrow down the list. As an example, here is how to select just the 'SEIU' bargaining units:

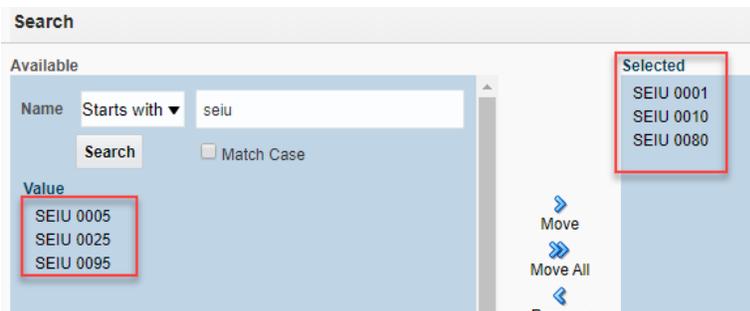
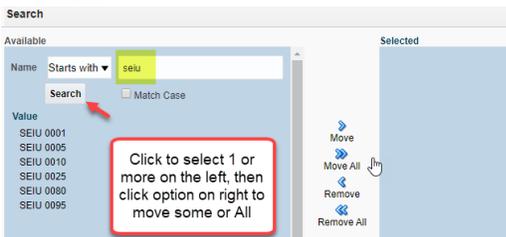
✓ Click the 'Search' area at the bottom of the drop-down list:



✓ Type in 'seiu' in the search box, then click 'Search'.



➤ Select one or more of the search results, then use the arrows to move the selected items to the right side:



The search function defaults to “Starts with” but there are also options “Contains” and “Ends with”:

**Search**

Available

Name Starts with

Value

Starts with

Contains

Ends with

Match Case

**Search**

Available

Name Contains

Value

LOCAL 39 0085

Search

Match Case

### Naming Standards

As part of moving the reports from Discoverer to BI Publisher, we’ve standardized many column headings so they may be different from what is in the Discoverer report. For example, for “Person Code” some reports used EE ID, or EE#, or Employee ID. Those will all be “Person Code” in BI Publisher.

### Consolidation

As much as reasonably possible, if there were multiple Discoverer reports that had similar data we combined them into one report. The new report may have more data in it than you need, but you can filter that out, or hide/remove columns.

Examples of Discoverer reports that were consolidated into one Publisher report:

<p>Allocated Positions - Filled and Vacant</p>	<ul style="list-style-type: none"> <li>• DEPT_HR Position Allocations Summary by County Dept and JC - # Filled and Vacant</li> <li>• DEPT_HR Position Allocations Summary by County Dept_Agency- # Filled and Vacant</li> <li>• DEPT_HR Position Allocations Summary by eP Dept (PR Dept-Sect) - Filled and Vacant</li> <li>• HSD Positions - Includes Employee Details</li> <li>• Position Detail Report by Department with Distribution String and Department Code</li> <li>• Positions - Allocated and Vacant by Department</li> <li>• Positions - Allocated and Vacant by Department with Filter</li> <li>• Positions - Allocated and Vacant by Department with Subtotals</li> <li>• Positions - Allocated and Vacant by Program-Unit</li> <li>• Positions - Allocated and Vacant by Program-Unit with Subtotals</li> </ul>
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<p>Job Classification Master List</p>	<ul style="list-style-type: none"> <li>• Job Classification Master List - Alpha</li> <li>• Job Classification Master List - Mainframe</li> <li>• Job Classification Master List - Numeric</li> <li>• Job Classification Master List - Wage Rate</li> <li>• Job Classification Master List - Workers Comp Class</li> <li>• Job Classification A thru I Steps All Eff Dates</li> <li>• Job Classification Master List - by Rate</li> <li>• Job Classification Master List - Alpha Current A&amp;I Steps</li> </ul>
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Note that some of these consolidated reports have *lots* of columns, and in some cases there are too many to display online. For those reports the most pertinent columns will be listed on the screen, but all columns will be in the exported Excel file. Examples:

**On the screen:**

### Employee Assignment Changes

Run Date: 10-Feb-2020

- Excludes change reasons 'CONTACT INFO CHG', 'EFS UPDATE', 'EMAIL ADDRESS', 'MAINTAIN CONTACT', 'MAINTAIN PERSNL', 'TIMESAVER UPDATE', 'UNION MBR UPDATE', 'UPDATE DSTRBTION', and 'WEB PAY STUB'.
- Additional columns available in Excel export.

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PERSON CODE	NAME	CHANGE CODE	EFFECTIVE	ASSIGNMENT TITLE

**In Excel:**

Employee Assignment Changes

Run Date: 10-FEB-2020

• Excludes change codes 'CONTACT INFO CHG', 'EFS UPDATE', 'EMAIL ADDRESS', 'MAINTAIN CONTACT', 'MAINTAIN PERSNL', 'TIMESAVER UPDATE', 'UNION MBR UPDATE', 'UPDATE DSTRBTION', and 'WEB PAY STUB'.

• Additional columns available in Excel export.

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PERSON CODE	NAME	CHANGE CODE	EFFECTIVE	ASSIGNMENT TITLE	JOB CODE	POSITION CODE	UNIT CODE	GROUP CODE	ENTITY CODE	AUTH AREA	DEPT CODE	SUPERVISOR

**Special Case – Grouped Columns**

There are so many columns in the Employee Assignment Details report that they were *grouped* to make it easier to read. Click + to expand and see more columns, and – (minus) to compress.

Employee Assignment Details

Run Date: 10-FEB-2020

- Includes all filled assignments except vendors, volunteers, and retirees.
- Use [+] buttons at the top to expand column groups.

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PERSON CODE	NAME	ASSIGNMENT TITLE	POSITION	TYPE AND STATUS	ORGANIZATION	CONTACT	WAGES AND KEY DATES	DEPARTMENT-SPECIFIC

Employee Assignment Details

Run Date: 10-FEB-2020

- Includes all filled assignments except vendors, volunteers, and retirees.
- Use [+] buttons at the top to expand column groups.

Sonoma County Confidential - Do Not Distribute

PERSON CODE	NAME	ASSIGNMENT TITLE	JOB CODE	POSITION CODE	UNIT CODE	GROUP CODE	PTE	PTE ALL ASGMTS	POSITION	TYPE AND STATUS	ORGANIZATION	CONTACT	WAGES AND KEY DATES	DEPARTMENT-SPECIFIC

## Excel Output

There are two ways of exporting a report into Excel. Here are things to know about each one.

1. Some reports have an Interactive [I] and an Excel [E] layout. When you click the [I] layout it is displayed on the screen and can only be exported to PDF. When you click the [E] layout it will *automatically* export into Excel.



For reports exported through the [E] tab, if it includes dates there will be a hidden column in the Excel output next to the date column. The hidden column has the original date from the database which includes the timestamp. The viewable column has the nicely formatted date. Example of hidden columns C, E, and I:

A	B	D	F	G	H	J	K	L	M
<b>Employee History Report With Leaves</b> Run Date: 04-FEB-2020 Sonoma County Confidential - Do Not Distribute									
NAME	PERSON CODE	ORIGINAL HIRE DATE	CURRENT HIRE DATE	ENTITY CODE	TYPE OF ASSIGNMENT	EFFECTIVE	CHANGE CODE	POSITION CODE	JOB CODE

This is what it looks like if the columns are expanded:

C	D
ORIGINAL HIRE DATE	ORIGINAL HIRE DATE
2017-08-10T00:00:00.000-07:00	10-Aug-2017

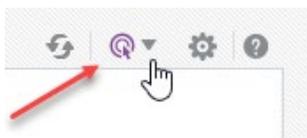
2. Some reports *only* have an interactive layout (there is no [E] tab). It may be labeled similar to the report name or it could be [I]. Examples of reports with the two types of tab names:



The exported file name will be the report name plus the tab name concatenated together.

 Extra Help Hours Worked\_Extra Help Hours Worked.xlsx
  Extra Help Hours by Pay Period\_[I].xlsx

For these reports, if you want to export to Excel you'll need to click the 'View Report' icon near the upper right corner.



It will give you these export options. Excel is the most-used option.



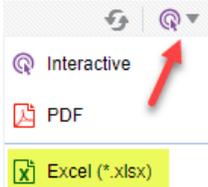
Regardless of which way you export to Excel, the file will be listed in the lower-left corner of your monitor. Single-click the file to open the Excel spreadsheet.



## Working with Excel output

Working with Excel output from BI Publisher is different than when exported from Discoverer. Below are the steps to apply filters, sorts, formulas, and conditional formatting. They apply to both file types (XLSX and XLS) with the exception of how filters are applied.

The file type will be **xlsx** when using this option:

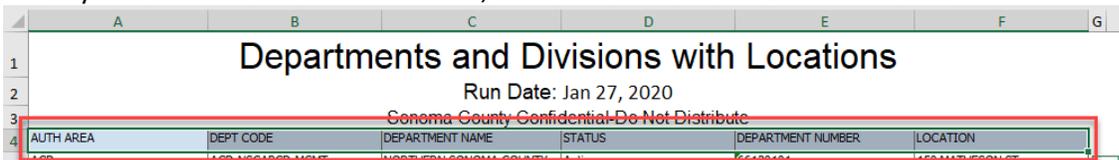


The file type will be **xls** if it came from an [E] tab:



### Filters - XLSX File Type

- To apply filters, select all column headers by clicking column header A, then hold down the SHIFT key and click the last column header, then click Filter on the Data menu tab.

A screenshot of an Excel spreadsheet. The title is 'Departments and Divisions with Locations'. Below the title is 'Run Date: Jan 27, 2020'. A red box highlights the column headers: 'AUTH AREA', 'DEPT CODE', 'DEPARTMENT NAME', 'STATUS', 'DEPARTMENT NUMBER', and 'LOCATION'. The text 'Sonoma County Confidential-Do Not Distribute' is visible in the background.

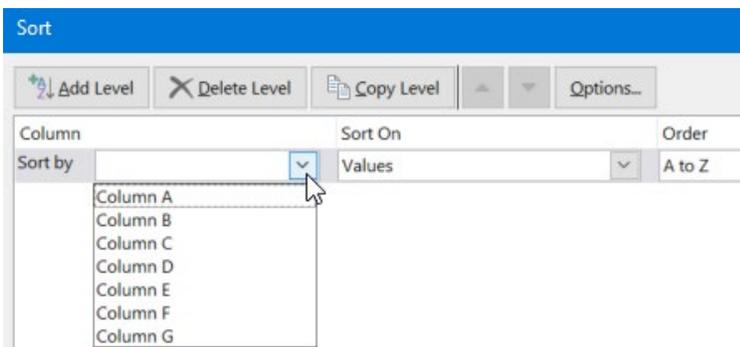
AUTH AREA	DEPT CODE	DEPARTMENT NAME	STATUS	DEPARTMENT NUMBER	LOCATION
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### Filters - XLS File Type

- To apply filters, click any column header or any cell below the column headers, then click Filter.

### Applying Sorts, Formulas, and Conditional Formatting - Both File Types

- To sort, click anywhere in the data below the column headers. Then click Sort | Custom Sort. Select the column(s) to sort on. See below:



- To apply a formula such as VLOOKUP, click the row under the column headers for the appropriate column then enter the formula.
- To apply conditional formatting, click the row under the column headers for the appropriate column and then press Ctrl-Shift-Down Arrow to select all rows in that column. Then go to Conditional Formatting on the Home tab and apply your conditional formatting.

**Note:** Regardless of the Excel file type, when creating a pivot table you **must save the report** to your local drive or to a network share first, then create the pivot table. Creating a pivot table on a tmp (temporary) file will not work.

## Saving PDF output to a file

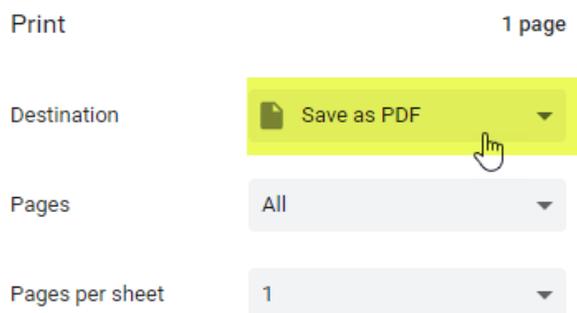
The option to export a report to PDF is here:



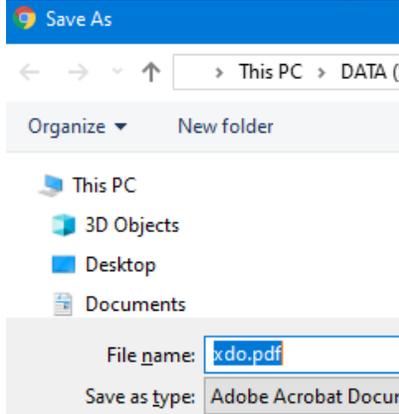
When a report is first output to PDF it is listed in a window of BI Publisher. Hover your mouse in the top right corner of the report window to see more options. Do NOT select the 'Download' option. Instead, select the 'Print' option.



When the Print dialogue box comes up, select 'Save as PDF' and then click 'Save'.



It will open a "Save As" dialogue where you can select the folder to save it to:



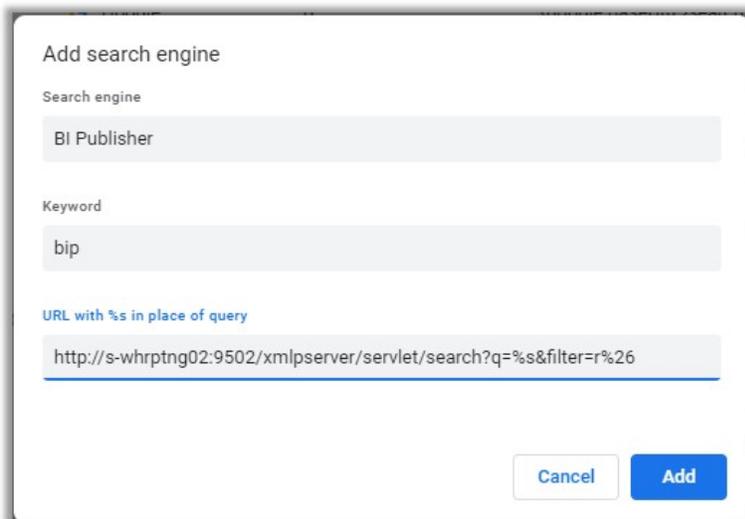
### Option to Customize Your Search Engine

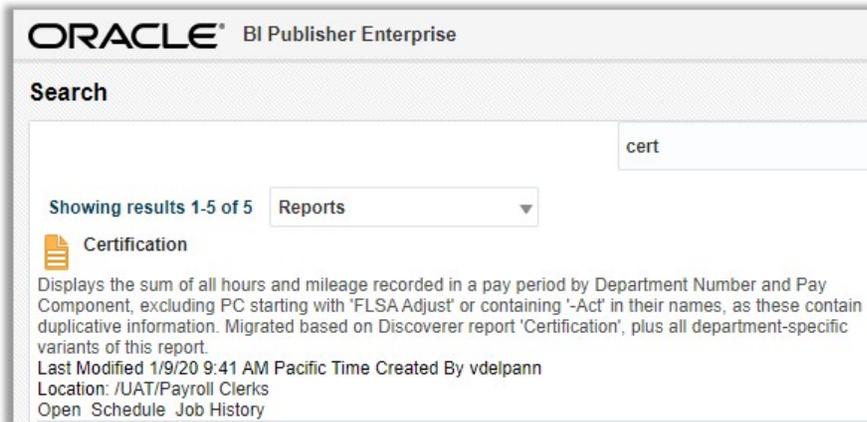
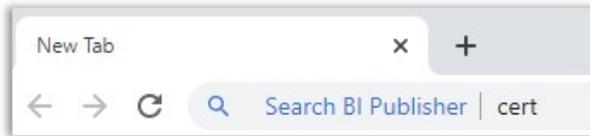
You can create a custom search engine in Chrome that will find Reports in BIP (excluding Data Models and other objects). To do this, open Chrome, press the 3 dot button at the top right, and select *Settings*. Press *Manage Search Engines* and click the *Add* button.

Once there, give a name to the search engine (e.g. "BI Publisher") and a keyword to start a search (e.g. "b" or "bip"). In the URL section, enter this text:

<http://s-whrptng02:9502/xmlpserver/servlet/search?q=%s&filter=r%26>

Once done, this will let you search for a report directly from the Chrome address bar by just typing "bip [report name]".





### BI Publisher Limitations

- Pivot tables are not easy to do in Publisher. You will mostly see them on the interactive layout. With the Excel layout you may need to create your own pivot table.
- Reports with lots of parameters might need to be maximized for you to expand the parameter menu. This is a known bug and currently there's no ETA on a fix.
- Performance is about the same as Discoverer, but *large reports do not show a progress bar until the report is about to be rendered* so it can appear as if nothing is happening.
- Publisher is slow when browsing the catalog. If you click between folders be very patient as it may take 30 seconds or more to list all the reports in the folder. The more reports in the folder the longer it will take.
- Publisher timeout is 16 minutes. The good news is that when you log back in it will take you to where you left off. We plan to extend the timeout in a few months.

### Key Takeaways

- Please follow the steps on Page 1 of this document to:
  - Have the Chrome browser installed if you do not have it
  - Bookmark the link to BI Publisher in Chrome
  - Set your account time zone to Pacific Time
- Contact the HRIS team at [HRIS@sonoma-county.org](mailto:HRIS@sonoma-county.org) if you have issues or questions about your report.