

## Siebel 8.1.x BI Publisher Reports

**Duration:** 3 Days

### What you will learn

The Siebel 8.1.x BI Publisher Reports course is intended for developers, administrators, business analysts, and end users who are responsible for building new and, modifying existing reports in a Siebel installation. As of the 8.1.1 release of Siebel CRM, the BI Publisher Server is used to generate reports and replaces the Actuate Reports Server. This course is a new course that covers reporting using only the BI Publisher Server. Note this course does not teach participants how to convert existing Actuate report templates to BI Publisher report templates.

The course provides participants with the knowledge to modify existing reports, to create a variety of new reports, and to make the reports available to Siebel clients. Participants learn how to use use Microsoft Word with the BI Publisher Desktop add-in to create and modify report templates. They also learn how to use BI Publisher Server to generate reports. Participants learn how to configure the Siebel application to enable reporting features such as parameterized reports and report scheduling. In addition participants learn how to configure a Siebel application to access the BI Publisher Serve.

Learn To:

Create custom Siebel reports

Enable report scheduling and parameterized reports

Administer the BI Publisher server for Siebel reports

Translate Siebel rpeorts

Modify existing Siebel reports

Create custom Siebel reports

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### Audience

Administrator

Application Developers

Business Analysts

Developer

End Users

Reports Developer

Support Engineer

System Integrator

### Related Training

#### *Required Prerequisites*

Ability to use the Siebel Mobile and Web clients

Ability to navigate in Siebel Tools

### **Course Objectives**

Modify as-delivered Siebel reports

Create new reports

Deploy reports to Siebel clients

Configure a Siebel application to access the BI Publisher Server

Add charts to reports

### **Course Topics**

#### **Introducing Siebel reports**

Generating Siebel reports using BI Publisher

Exploring the Siebel reports architecture

#### **Installing and configuring Siebel reports**

Configuring a Siebel application to access the report server

Implementing the Siebel Security Model

Uploading report templates to the BI Publisher server

Scheduling a Siebel report

Configuring report scheduling

#### **Creating and editing report templates**

Editing an existing report template

Creating a custom report template

Deploying and testing reports

Formatting date and number fields

Adding summary field to a report

#### **Configuring the Report Schema**

Adding a field to an existing integration object

Deploying an integration object to the database

Creating a new integration object

#### **Configuring additional report functionality**

Creating master-detail reports

Creating parameterized reports

Add charts to reports

#### **Administering Siebel reports**

Deploying reports to the Siebel server

Purging existing reports

Optimizing report performance

Translating reports

