

BI Report

Multiple layout in RTF template

Steps involved in BI Report Creation

- Create New data model
- Querying corresponding report
- If needed create parameters and List of Values/Bursting
- Then view the data model in Table view
- Save the sample data and then save.
- Then export
- XML file will be downloaded and save this xml file into chainsys folder
- Open that file in word remote desktop

Data Model
Diagram | Structure | Data | Code

Properties

- Data Sets
 - Project**
- Event Triggers
- Flexfields
- List of Values
 - BU
 - INVOICE
- Parameters
 - FROM_DATE
 - TO_DATE
 - INVOICE_NUM
 - BUSINESS_UNIT
- Bursting

G_1		
INVOICE_ID	#E▼	⚙️
INVOICE_AMOUNT	#E▼	⚙️
INVOICE_NUM	A	⚙️
ORG_ID	#E▼	⚙️
CREATION_DATE	🕒	⚙️
BUSINESS_UNIT	A	⚙️
COUNTRY	A	⚙️
CITY	A	⚙️
VENDOR_NAME	A	⚙️
ADDRESS_LINE1	A	⚙️
VENDOR_ID	#E▼	⚙️
AMOUNT_PAID	#E▼	⚙️
ACCOUNTING_DATE	🕒	⚙️

Global Level Functions ⚙️
 Drop here for aggregate function

Analysis and Interactive Reporting

- Analysis
- Dashboard
- Filter
- Dashboard Prompt
- Condition

Mobile Application

- Mobile App

Published Reporting

- Report
- Report Job
- Data Model
- Style Template
- Sub Template

Actionable Intelligence

- Agent
- Action

Performance Management

- Scorecard
- KPI
- KPI Watchlist

Marketing

- Segment
- Segment Tree
- List Format

Data Model

Properties

Data Sets

Project

Event Triggers

Flexfields

List of Values

BU

INVOICE

Parameters

FROM_DATE

TO_DATE

INVOICE_NUM

BUSINESS_UNIT

Bursting

Diagram

Structure

Data

Code

Global Level Functions

Drop here for aggregate function

Validate

Manage Private Data Sources

View Data

Create Report

Generate Explain Plan

OK

Cancel

Drop here for aggregate function

Edit Data Set - Project

* Name

Project

* Data Source

ApplicationDB_FSCM

* Type of SQL

Standard SQL

* SQL Query

SELECT
INVL INVOICE_ID,
INV.INVOICE_NUM,
INV.INVOICE_AMOUNT,
INV.AMOUNT_PAID,
POZSVENDOR_NAME,
INV.VENDOR_ID,
INVD.ORG_ID,
INVD.ACCOUNTING_DATE,
INVP.CREATION_DATE,
HRO.NAME AS BUSINESS_UNIT,
POZSV.ADDRESS_LINE1,
POZSV.COUNTRY,
POZSV.CITY
FROM AP_INVOICES_ALL INV

Query Builder

Generate Explain Plan

OK

Cancel

Data Model

Properties

- Data Sets
- Project
- Event Triggers
- Flexfields
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 - INVOICE
- Parameters
 - FROM_DATE
 - TO_DATE
 - INVOICE_NUM
 - BUSINESS_UNIT
- Bursting

Parameters

*Name	Data Type	Default Value	Parameter Type	Mandatory	Row Placement	Reorder
FROM_DATE	Date		Date	<input type="checkbox"/>	3	▲▼
TO_DATE	Date		Date	<input type="checkbox"/>	3	▲▼
INVOICE_NUM	String		Menu	<input type="checkbox"/>	2	▲▼
BUSINESS_UNIT	String		Menu	<input type="checkbox"/>	1	▲▼

Display Label Invoice number

List of Values INVOICE

Number of Values to Display in List 100

- Options
- ☐ Multiple Selection
- ☒ Can select all
- ☒ NULL Value Passed ☐ All Values Passed
- ☐ Refresh other parameters on change

Data Model

- Properties
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 - FROM_DATE
 - TO_DATE
 - INVOICE_NUM
 - BUSINESS_UNIT
 - Bursting

List of Values

Name	Type	Data Source	Reorder
BU	SQL Query	ApplicationDB_FSCN	
INVOICE	SQL Query	ApplicationDB_FSCN	

BU: Type: SQL Query

Options ☐ Cache Result

SQL Query

Query Builder

```
SELECT NAME|
FROM HR_ALL_ORGANIZATION_UNITS
WHERE ORGANIZATION_ID IN (3000000047568131,3000000046987012,3000000047498175,3000000180010546)
```


Data Model

Properties

- Data Sets
 - Project
- Event Triggers
- Flexfields
- List of Values
 - BU
 - INVOICE
- Parameters
 - FROM_DATE
 - TO_DATE
 - INVOICE_NUM
 - BUSINESS_UNIT
- Bursting

Diagram Structure Data Code

Business Unit All

Invoice number All

From date To date

Rows 50 View Export Save As Sample Data View Engine Log Generate SQL Monitor Report

Tree View Table View

An Image

Oracle BI Publisher

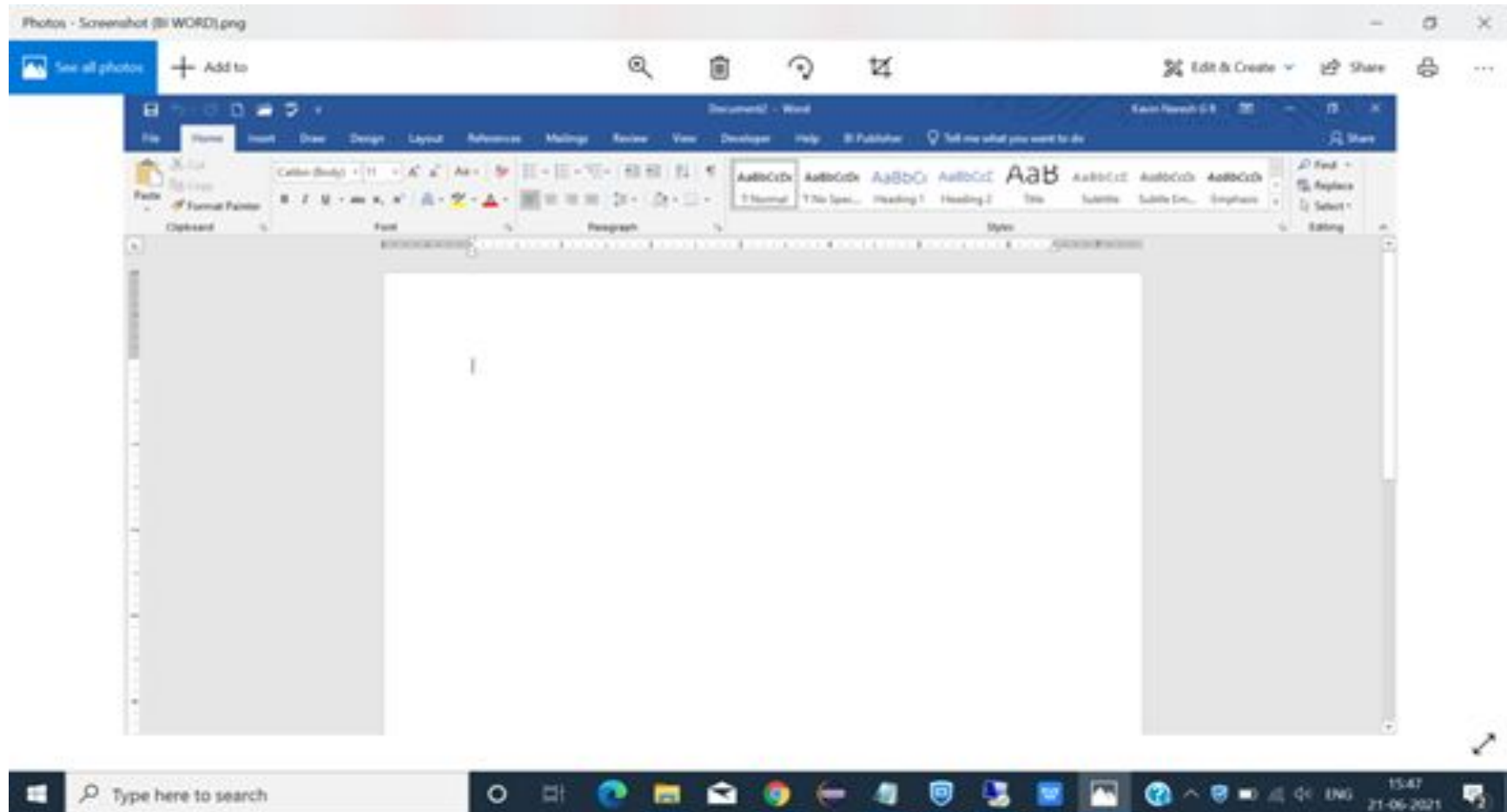
Date: Jun 18, 2021 8:45:56 PM
Page 1 Of 1

INVOICE_ID	INVOICE_AMOUNT	INVOICE_NUM	ORG_ID	CREATION_DATE	BUSINESS_UNIT	COUNTRY	CITY	VENDOR_NAME	ADDRESS_LINE1	VENDOR_ID	AMOUNT_PAID	ACCOUNTING_DATE
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	US	Washington	Lee Supplies	758 11Th St SE	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	NL	Amsterdam	Lee Supplies	Leidsestraat 32-34	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	GB	London	Lee Supplies	33 Dartmouth Park Hill	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	US	Washington	Lee Supplies	758 11Th St SE	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	US	LOS ANGELES	Lee Supplies	5000 CARTER DR.	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	CH	Basel	Lee Supplies	Friedensgasse 59	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	IN	New Delhi	Lee Supplies	South Ave	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	US	Los Angeles	Lee Supplies	855 Hill Street	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	NL	Amsterdam	Lee Supplies	Leidsestraat 32-34	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	CA	Montreal	Lee Supplies	3975, rue St-Ambroise	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	PL	Warsaw	Lee Supplies	Przyokopowa 31	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	CH	Bern	Lee Supplies	Aarberggasse 25	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	SE	Stockholm	Lee Supplies	Grevgatan 38	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	US	La Canada	Lee Supplies	3200 Fairlawn	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00
1	13464.12	40910	300000046987012	2013-12-16T22:32:59.422+00:00	US1 Business Unit	JP	MITA	Lee Supplies	1-2-3	300000047572113	13464.12	2012-01-01T00:00:00.000+00:00

Steps involved in Remote desktop word

- Load the sample data by clicking on Sample xml folder
- Then insert table columns and rows
- Click fields in the top bar/{Table wizard}
- Then insert the corresponding fields in to columns
- Select the inserted rows and click Repeating group
- To enable developer go to up arrow on the top page-->more commands
--->customise ribbon--->enable DEVELOPER.
- click legacy tool(suitcase icon-->Text field form)==>double click on that indent

- Put `<?if:Business_Unit='UK Business Unit'?>` In code tab and give some name for that code
- `<?for-each-group:G_1;./VENDOR_NAME?>`
- Put those tags before table
- After table put below tags
- `<?split-by-page-break:?>`
- `<?end for-each-group?>`
- `<?end if?>`



Visual Basic
Macros
Record Macro
Pause Recording
Macro Security
Code

- Customize Quick Access Toolbar
- ✓ New
 - ✓ Open
 - ✓ Save
 - Email
 - Quick Print
 - Print Preview and Print
 - ✓ Spelling & Grammar
 - Read Aloud
 - ✓ Undo
 - ✓ Redo
 - Draw Table
 - Touch/Mouse Mode
 - More Commands...
 - Show Below the Ribbon

Design Mode
Properties
Group
XML Mapping Pane
Mapping
Block Authors
Restrict Editing
Protect
Document Template
Templates

1 2 3 4 5 6 7

oup G_1 by BUSINESS_UNIT

BUSINESS_UNIT

CREATIO N_DATE	LEGAL_E NTITY_ID	CUSTOME R_TRX_ID	TRX_N UMBER	SET_OF_B OOKS_ID	OR G_ID	CUSTOME R_NAME	CUST_ACC OUNT_ID	ACCOUNT _NUMBER
F CREATIO N_DATE	LEGAL_E NTITY_ID	CUSTOME R_TRX_ID	TRX_N UMBER	SET_OF_B OOKS_ID	OR G_ID	CUSTOME R_NAME	CUST_ACC OUNT_ID	ACCOUNT _NUMBER

end

end G_1 by BUSINESS_UNIT

FileHomeInsertDrawDesign

Record Macro
Pause Recording
Macro Security
Code

Visual Basic
Macros
Add-ins

Word Options

General
Display
Proofing
Save
Language
Ease of Access
Advanced
Customize Ribbon
Quick Access Toolbar
Add-ins
Trust Center

Customize the Ribbon and keyboard shortcuts.

Choose commands from: Popular Commands

Accept Revision
Add Table
Align Left
Bullets
Center
Change List Level
Copy
Cut
Define New Number Format...
Delete
Draw Table
Draw Vertical Text Box
Email
Find
Fit to Window Width
Font
Font Color
Font Settings
Font Size
Footnote
Format Painter
Grow Font
Insert Comment
Insert Page Section Breaks
Insert Picture
Insert Text Box
Line and Paragraph Spacing

Add >>
<< Remove

Keyboard shortcuts: Customize...

Customize the Ribbon

Main Tabs

Main Tabs
Blog Post
Insert (Blog Post)
Outlining
Background Removal
Home
Insert
Draw
Design
Layout
References
Mailings
Review
View
Developer
Code
Add-ins
Controls
Mapping
Protect
Templates
Add-ins

New Tab
New Group
Rename...
Reset
Import/Export

OK
Cancel

Page 1 of 1 1 of 30 words English (United States)

37°C Mostly... ENG 3:10 PM

FileHomeInsertDrawDesign

Record Macro

Pause Recording

Macro Security

Code

Visual Basic

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Word Options

General

Display

Proofing

Save

Language

Ease of Access

Advanced

Customize Ribbon

Quick Access Toolbar

Add-ins

Trust Center

Customize the Ribbon and keyboard shortcuts.

Choose commands from: Popular Commands

Accept Revision

Add Table

Align Left

Bullets

Center

Change List Level

Copy

Cut

Define New Number Format...

Delete

Draw Table

Draw Vertical Text Box

Email

Find

Fit to Window Width

Font

Font Color

Font Settings

Font Size

Footnote

Format Painter

Grow Font

Insert Comment

Insert Page Section Breaks

Insert Picture

Insert Text Box

Line and Paragraph Spacing

Add >>

<< Remove

Keyboard shortcuts: Customize...

Customize the Ribbon: Main Tabs

Main Tabs

☒ Blog Post

☒ Insert (Blog Post)

☒ Outlining

☒ Background Removal

☒ Home

☒ Insert

☒ Draw

☒ Design

☒ Layout

☒ References

☒ Mailings

☒ Review

☒ View

☒ Developer

☐ Code

☐ Add-ins

☐ Controls

☐ Mapping

☐ Protect

☐ Templates

☒ Add-ins

New Tab

New Group

Rename...

Customizations:

Reset

Import/Export

OK

Cancel

Page 1 of 1

1 of 30 words

English (United States)

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ENG 3:10 PM

Text	Code
BUSINESS_UNIT	<?BUSINESS_UNIT?>
REPORT_DATE	<?REPORT_DATE?>
O	<?if:BUSINESS_UNIT='Supremo US Business Unit'?>
C	<?for-each-group:G_1:./VENDOR_NAME?>
VENDOR_NAME	<?VENDOR_NAME?>
VENDOR_ID	<?VENDOR_ID?>
ADDRESS_LINE1	<?ADDRESS_LINE1?>
CITY	<?VENDOR_ID?>
COUNTRY	<?COUNTRY?>
F	<?for-each:current-group[]?>
INVOICE_ID	<?INVOICE_ID?>
INVOICE_NUM	<?INVOICE_NUM?>
INVOICE_AMOUNT	<?INVOICE_AMOUNT?>
E	<?end for-each?>
P	<?split-by-page-break:?>
D	<?end for-each-group?>
E	<?end if?>
O	<?if:BUSINESS_UNIT='France Business Unit'?>
C	<?for-each-group:G_1:./VENDOR_NAME?>
VENDOR_NAME	<?VENDOR_NAME?>
VENDOR_ID	<?VENDOR_ID?>
ADDRESS_LINE1	<?ADDRESS_LINE1?>
CITY	<?CITY?>
COUNTRY	<?COUNTRY?>
F	<?for-each:current-group[]?>
INVOICE_ID	<?INVOICE_ID?>
INVOICE_NUM	<?INVOICE_NUM?>
INVOICE_AMOUNT	<?INVOICE_AMOUNT?>
CREATION_DATE	<?CREATION_DATE?>
E	<?end for-each?>
P	<?split-by-page-break:?>
D	<?end for-each-group?>
E	<?end if?>

Steps involved in Layout Creation

- Then open that file in EXCEL and save that file In RTF form
- Mapping the Data model in oracle using create report
- Then click upload xml,rtf file and choose the RTF template for Uploading
- Then save that file and Finally Export into PDF form

Data Model

Properties

- Data Sets
 - Project
- Event Triggers
- Flexfields
- List of Values
 - BU
 - INVOICE
- Parameters
 - FROM_DATE
 - TO_DATE
 - INVOICE_NUM
 - BUSINESS_UNIT
- Bursting

Diagram

Structure

Data

Code

+ -

Validate

Manage Private Data Sources

View Data

Create Report

Global Level Functions

Drop here for aggregate function

G_1

INVOICE_ID	Σ	
INVOICE_AMOUNT	Σ	
INVOICE_NUM	A	
ORG_ID	Σ	
CREATION DATE		

Data Model PROJECT

Parameters Properties View Report

Cancel

Create Layout

Basic Templates

Blank (Portrait)

Blank (Landscape)

Header and Footer (Portrait)

Header and Footer (Landscape)

Upload or Generate Layout

Upload

Generate

Generate RTF layout based on selected Data Model.

Data Model PROJECT

Create Layout

Basic Templates

Blank (Portrait)

Blank (Landscape)

Header and Footer (Portrait)

Header and Footer (Landscape)

Upload or Generate Layout

Upload

Generate

Generate RTF layout based on selected Data Model.

Upload Template File

*Layout Name AP

*Template File Choose File TemplateBuilder.rtf

*Type RTF Template

*Locale English (United States)

Upload Cancel

Business Unit US1 Business Unit

Invoice number 0001

From date 06-01-2021

To date 06-19-2021 Apply

AP

REPORT FOR ACCOUNTS PAYABLE



BUSINESS UNIT DETAILS

BU ID:300000046987012

BU Name:US1 Business Unit

SUPPLIER DETAILS

Supplier Name:Shangduo Inc

Supplier Id:300000047507499

City:Wenzhou

Country:CN

DETAILS

INVOICE ID	INVOICE NU	INVOICE AMOUN	CREATION DAT	AMOUNT PAI	ADDRESS LINE
------------	------------	---------------	--------------	------------	--------------

Business Unit US1 Business Unit
Invoice number 0001
From date 06-01-2021 To date 06-19-2021 Apply

REPORT FOR ACCOUNTS PAYABLE



BUSINESS UNIT DETAILS

BU ID:300000046987012
BU Name:US1 Business Unit

SUPPLIER DETAILS

Supplier Name:Shangduo Inc
Supplier Id:300000047507499
City:Wenzhou
Country:CN

DETAILS

INVOICE ID	INVOICE NU	INVOICE AMOUN	CREATION DAT	AMOUNT PAI	ADDRESS LINE
------------	------------	---------------	--------------	------------	--------------

AP

Edit Report
Edit Layout
Export
Send
Schedule
Jobs
Job History
Republish from History
Share Report Link
Online Diagnostics

HTML
PDF
RTF
Excel (*.xlsx)
PowerPoint (*.pptx)

BU1_AP LAYOUT1.pdf - HP Sure Click Secure View

File Edit View Sign Window Help

HomeToolsBU1_AP LAYOUT1.... x

1 / 798

106%

Search tools

Comment

Fill & Sign

More Tools

Store and share files in the Document Cloud

Learn More

REPORT FOR ACCOUNTS PAYABLE

BUSINESS UNIT DETAILS

BU ID:300000046987012

BU Name:US1 Business Unit

SUPPLIER DETAILS

Supplier Name:Shangduo Inc

Supplier Id:300000047507499

Type here to search

09:33
19-06-2021