

# BI Report Creation

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



INVOICE_ID		⚙
INVOICE_AMOUNT		⚙
INVOICE_NUM	A	⚙
ORG_ID		⚙
CREATION_DATE	🌿	⚙
BUSINESS_UNIT	A	⚙
COUNTRY	A	⚙
CITY	A	⚙
VENDOR_NAME	A	⚙
ADDRESS_LINE1	A	⚙
VENDOR_ID		⚙
AMOUNT_PAID		⚙
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

javascript:void(null)

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,  
INVL INVOICE\_NUM,  
INVL INVOICE\_AMOUNT,  
INVL AMOUNT\_PAID,  
POZSV VENDOR\_NAME,  
INVL VENDOR\_ID,  
INVD ORG\_ID,  
INVD ACCOUNTING\_DATE,  
INVP CREATION\_DATE,  
HRO NAME AS BUSINESS\_UNIT,  
POZSV ADDRESS\_LINE1,  
POZSV COUNTRY,  
POZSV CITY  
FROM AD\_INVOICES\_ALL INV

Query Builder

Generate Explain Plan

OK

Cancel

Data Model

Properties

Data Sets

Project

Event Triggers

Flexfields

List of Values

BU

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

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- Data Sets
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  - INVOICE
- Parameters
  - FROM\_DATE
  - TO\_DATE
  - INVOICE\_NUM
  - BUSINESS\_UNIT
- Bursting

List of Values

+ X

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)
```

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Data Model

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- Data Sets
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  - 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  
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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 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

# 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
- Then insert the corresponding fields in to columns
- 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 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
------------	------------	---------------	--------------	------------	--------------

Report actions menu:

- Edit Report
- Edit Layout
- Export
  - HTML
  - PDF
  - RTF
  - Excel (\*.xlsx)
  - PowerPoint (\*.pptx)
- Send
- Schedule
- Jobs
- Job History
- Republish from History
- Share Report Link
- Online Diagnostics



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REPORT FOR ACCOUNTS PAYABLE

BUSINESS UNIT DETAILS

BU ID:300000046987012

BU Name:US1 Business Unit

SUPPLIER DETAILS

Supplier Name:Shangduo Inc

Supplier Id:300000047507499

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19-06-2021