

Oracle BI Publisher 12c R1: Fundamentals

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1. Introduction

BI Publisher 12c

Agenda

This lesson provides a course overview, including:

- Introductions: Instructor, observers, and students
- Course:
 - Audience
 - Prerequisites
 - Goal
 - Objectives
 - Methodology
 - Materials
 - Agenda

Introductions

- Instructor introduction
- Observer introduction
- Student introduction
 - Who are you?
 - Name
 - Role
 - What is your prior experience?

Training Site Information

Restrooms



Telephones



Fire exits



Class duration and breaks



Meals and refreshments



Questions?



Audience

This course is designed for implementation teams:

- Configurators and report developers
- Applications administrators
- Technical business developers



Course Goal

Enable students to create, modify, and administer Oracle Business Intelligence Publisher report definitions.



Course Objectives

After completing this course, you should be able to:

- Describe the components, basic features, and positioning of BI Publisher as a reporting tool
- Explain the uses of Oracle Business Intelligence Publisher(BI Publisher)
- Create BI Publisher reports against various data sources
- Use Data Model Editor to create data models
- Define parameters and LOVs for a data model
- Create report layouts by using Layout Editor

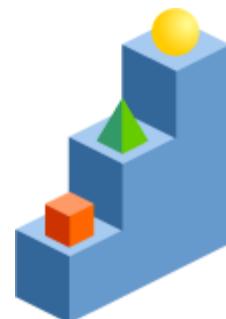
Course Objectives

- Use BI Publisher Template Builder to create RTF templates
- Create Excel template
- Administer and configure the BI Publisher Server
- Schedule and burst reports
- Create data models and reports based on various other data sources, such as web services, Essbase, RSS feeds, and flat files

Methodology

Subject matter is delivered through:

- Lecture and slide presentations
- Class discussions
- Hands-on practices



Schedule

- Day One
 - Lesson 1: Course Introduction
 - Lesson 2: Introduction to Oracle BI Publisher 12c
 - Lesson 3: BI Publisher: Technology and Architecture
 - Lesson 4: Getting Started with BI Publisher
 - Lesson 5: Using Data Model Editor



Schedule

- Day Two
 - Lesson 6: Working with Layout Editor
 - Lesson 7: Using Template Builder to Create RTF Templates
 - Lesson 8: BI Publisher Server: Administration and Security



Schedule

- Day Three
 - Lesson 9: Scheduling and Bursting Reports
 - Lesson 10: Integrating BI Publisher with Oracle BI Enterprise Edition
 - Lesson 11: Creating Data Models and BI Publisher Reports Based on Other Data Sources



2. Introduction to Oracle BI Publisher12c

Objectives

After completing this lesson, you should be able to:

- Describe the evolving role of BI and Oracle BI solutions
- Describe the uses of BI Publisher and its advantages over classic reporting tools
- Describe how BI Publisher integrates with other Oracle products
- List some of the key features and benefits of BI Publisher

Oracle BI Foundation Suite: Overview

Components include:

- **Oracle BI Enterprise Edition 11g (Oracle BI EE):** The central component for creating ad hoc queries, reports, and dashboards
- **BI Publisher:** The industry's most scalable and easy-to-use solution for delivering high-fidelity, pixel-perfect reports in multiple formats
- **Oracle Scorecard and Strategy Management:** To assist you with building a strategic management plan



- **Oracle Essbase:** The market-leading OLAP server for forward-looking analysis

Oracle BI EE 12c: Overview



Functions of Reporting Systems

Reporting systems share three primary functions:

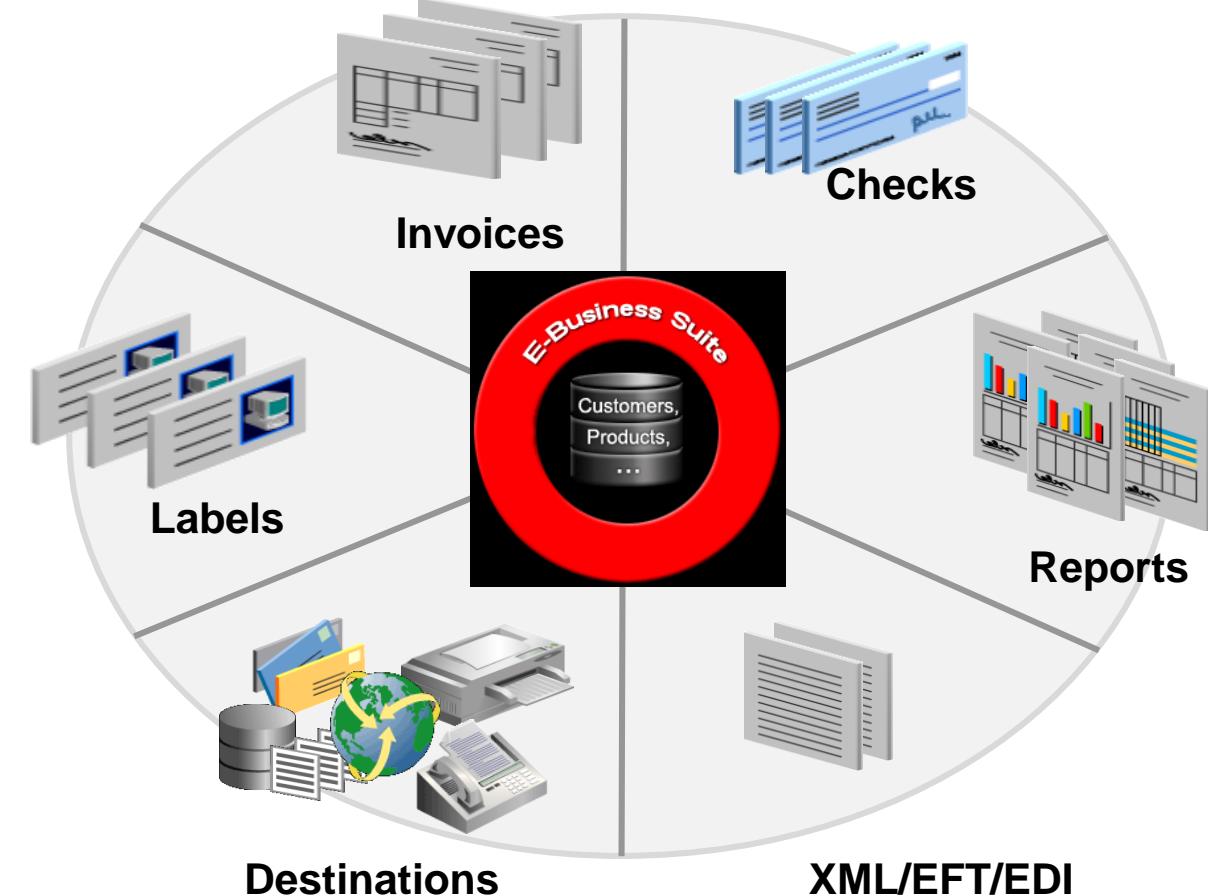
- Authoring
 - Business requirements definition
 - Data logic definition
 - Layout design
- Managing
 - Report security
 - Translation requirements
 - Customization needs
- Delivering
 - Publishing requirements (printed, email, web page)

Report Challenges

- Diverse requirements
- Complex infrastructure
- Classic paradigm
 - Slow development
 - Difficult to maintain
 - Others

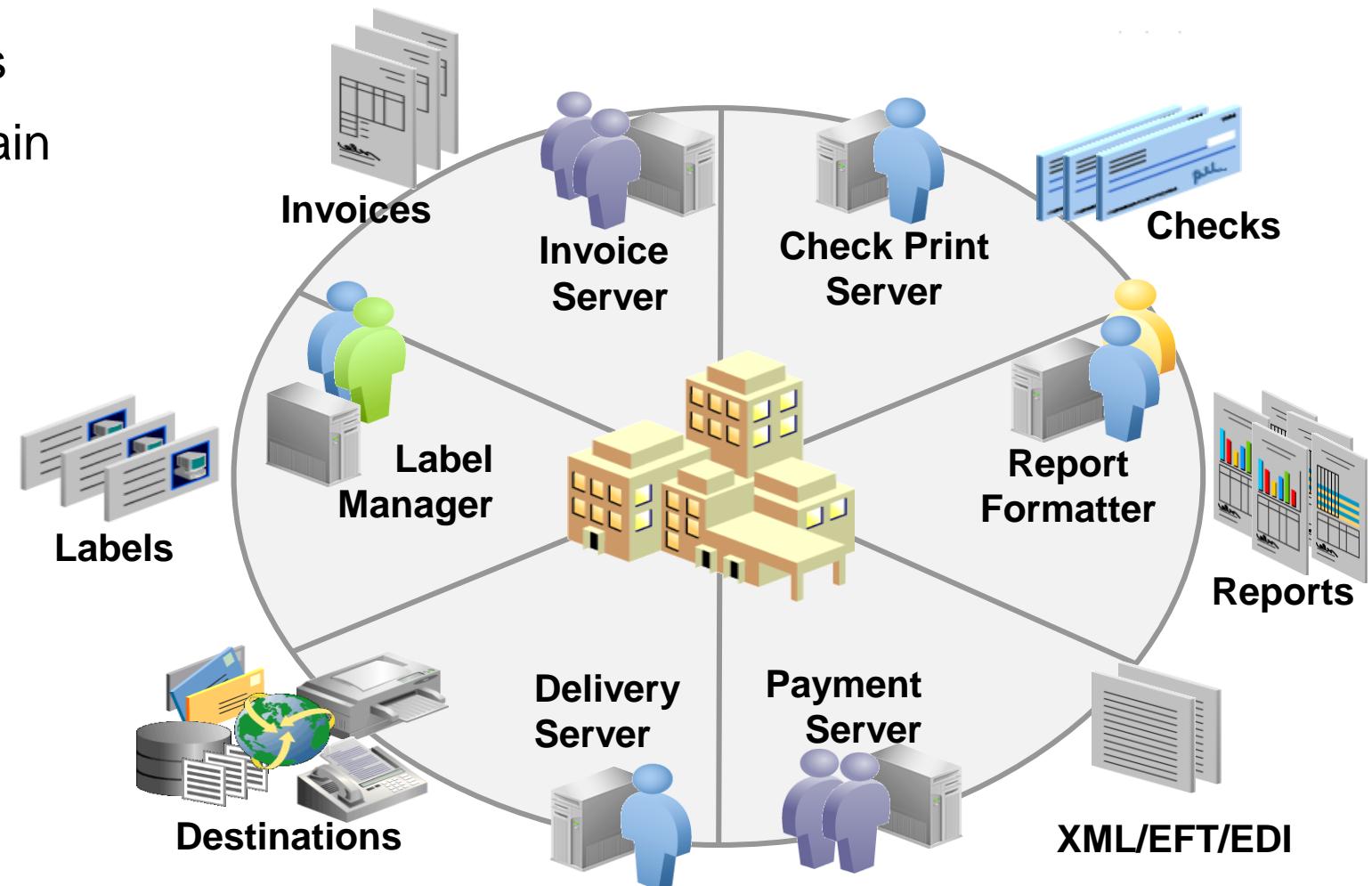
Reporting Challenges: Diverse Business Document Requirements

- Highly formatted reports
- Customer-facing documents
- Financial statements
- Government forms
- Marketing materials
- Contracts
- Checks
- Labels
- XML/EFT/EDI
- Multiple destinations

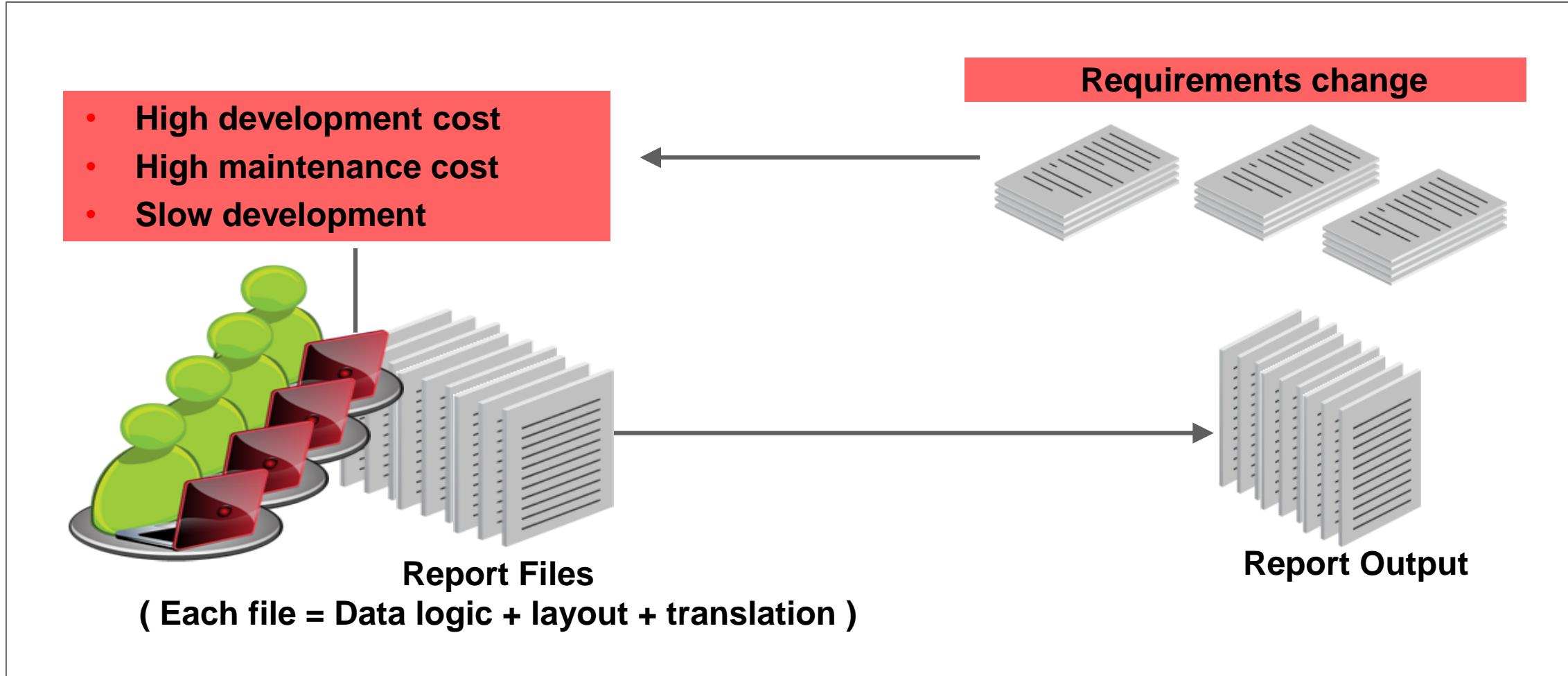


Reporting Challenges: Complex Infrastructure

- Multiple reporting solutions
- Skilled personnel to maintain servers and report formats
- Time consuming
- Labor intensive
- Expensive



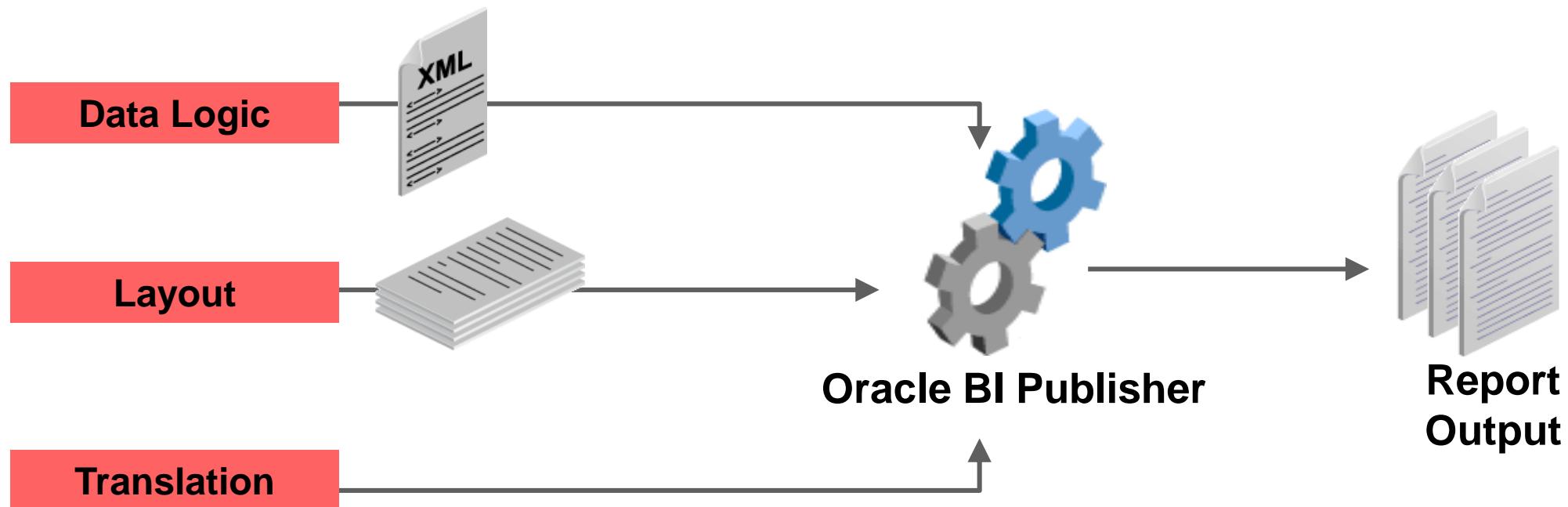
Reporting Challenges: Classic Reporting Tools Paradigm



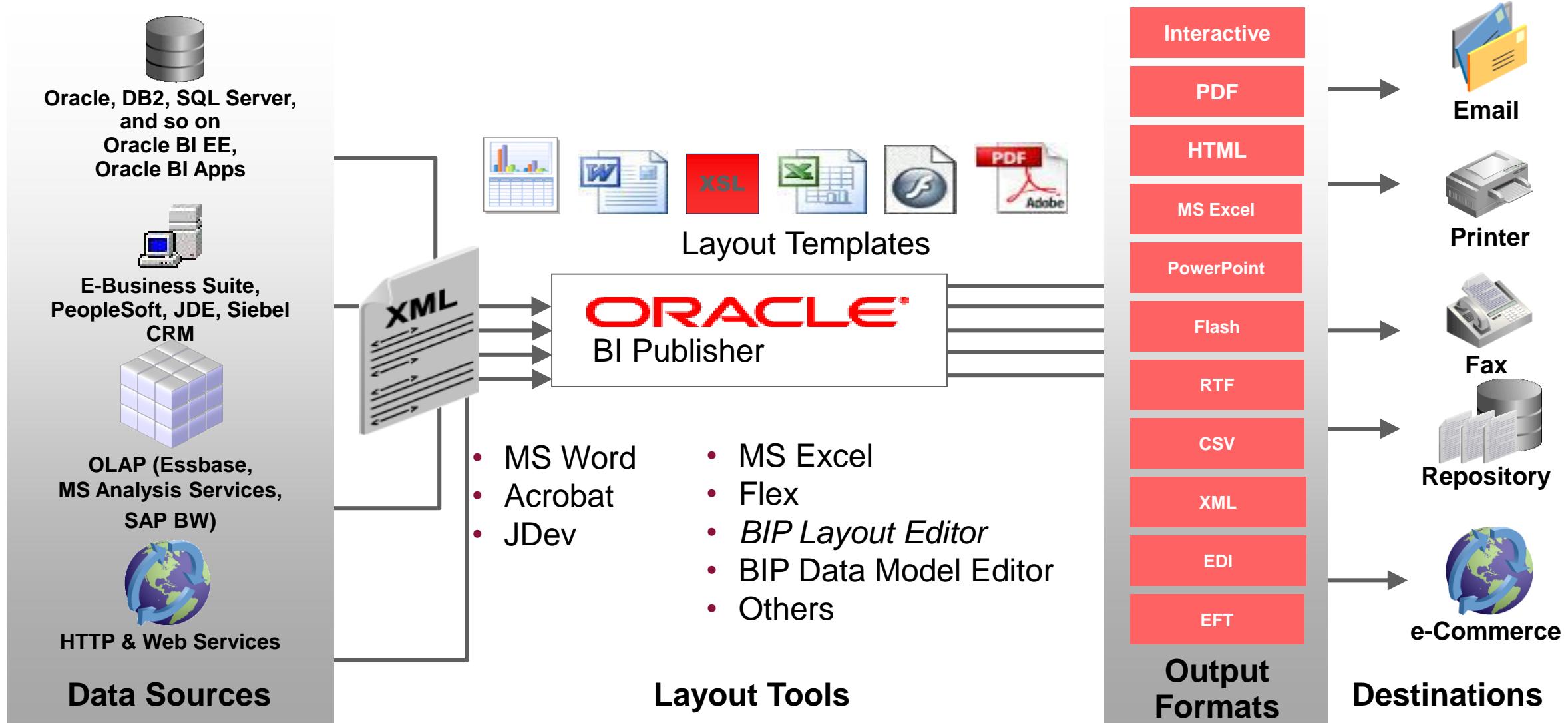
Oracle BI Publisher Paradigm: Introduction

Separate data, layout, and report

- Flexibility
- Reduced maintenance



End-to-End View of BI Publisher



Availability of BI Publisher

Oracle BI Publisher is:

- Available as a stand-alone product, BI Publisher Enterprise
- Seamlessly integrated with Oracle Business Intelligence Enterprise Edition (Oracle BI EE)
- Integrated with many other Oracle products
 - Applications unlimited:
 - E-Business Suite
 - PSFT, Siebel CRM, JDE Enterprise, Oracle Primavera, and many other products
 - Fusion Applications

Oracle BI Publisher Trial Edition

ORACLE® Business Intelligence Publisher

NEXT STEPS

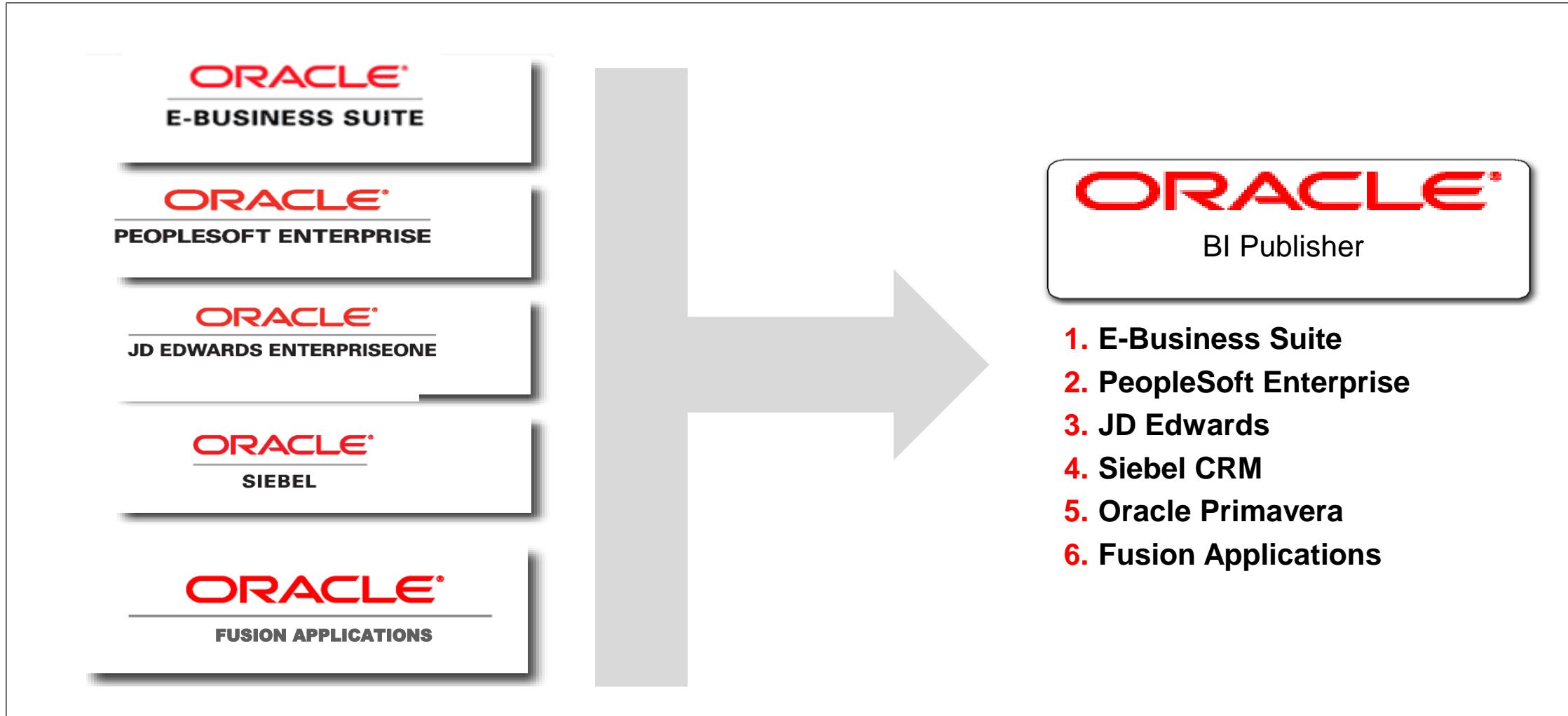
BI Publisher is Oracle's enterprise reporting solution to author, manage and deliver all your reports and documents. To get started, open the Sample Reports, follow the Getting Started tutorial or watch the BI Publisher demo videos.

[See Sample Reports](#) [Sign In to BI Publisher](#) [Buy Now](#)



Contact Us	Get Started	Stay Connected
Call Oracle 1-800-633-0738	Quick Start Guide	 Blog
 Sales Chat Live	 Getting Started Tutorial	 Forum
 Global Contacts	Demo Videos	 Facebook
 Email	More Information	 Twitter

BI Publisher as a Strategic Reporting Solution For All Oracle Applications



BI Publisher in Oracle Applications

- Oracle E-Business Suite
 - In 11*i*: 500 templates
 - In R12.1: All reports are BI Publisher (2,800 templates and 2,092 data sources or data templates across 95 products)
- Oracle Reports to Publisher Conversion Assistant
- Siebel CRM
 - Integrated in 8.1.1: 119 reports
 - Actuate to Publisher Conversion Assistant

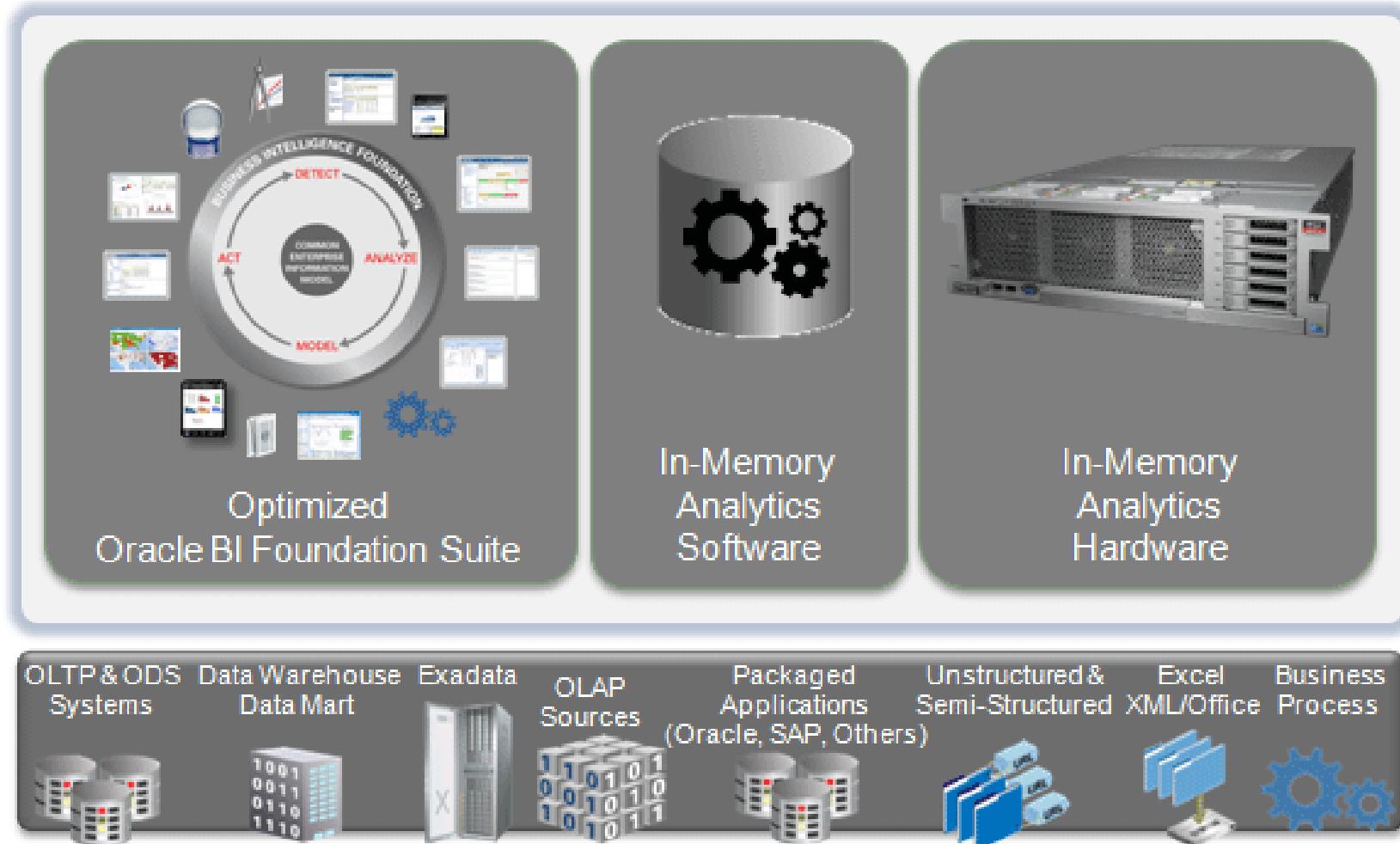
BI Publisher in Oracle Applications

- JD Edwards EnterpriseOne:
 - Integrated into 8.96 with batch engine (UBE) and enhanced with Tools release 8.97
 - JD Edwards EnterpriseOne JDBC driver Tools release 8.98.4 provides full support for BI Publisher 11g.
 - Allows customers to develop their own templates
- JD Edwards World:
 - Integrated in A9.1
 - Produces XML that can be used as input to BI Publisher
 - Supports automated integration in newly released A9.2

BI Publisher in Oracle Applications

- Oracle Primavera:
 - Oracle's Primavera Contract Management, Business Intelligence Publisher Edition is a document management, job cost, and field controls solution that keeps construction projects on schedule and on budget through complete project control.
 - It is coupled with Business Intelligence Reporting (BI Reports) to provide a robust and flexible report writing functionality within Contract Management.
 - It can use any of the 150 standard reports, or create your own reports to track budgets, cost variances, and project changes, and then analyze comparative trends among multiple projects.

BI Publisher on Oracle Exalytics In-Memory Machine



Key Features and Benefits of BI Publisher

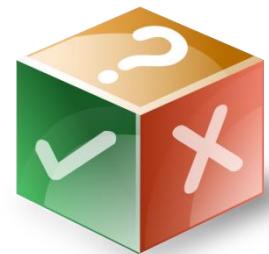
- Offers support for multiple data sources
- Enables rapid deployment
 - Provides a Create Report Wizard to quickly create simple reports
 - Provides a web-based Layout Editor to create layouts for pixel-perfect reports
 - Supports familiar desktop tools (for example, MS Word, Excel, Adobe Professional, and so on) for layout creation and customization
 - Increases developer productivity
- Offers support for multiple output formats
- Reduces complexity
- Reduces total cost, including maintenance
- Enables flexible customization

Key Features and Benefits of BI Publisher

- Comes with built-in internationalization support
 - Single Global Instance can support 185 languages in over 244 territories
 - Bidirectional language support
- Ships with full set of Unicode Fonts
- Eliminates the need for expensive language-specific printers

Quiz: Overview

This quiz examines your knowledge of the concepts discussed in the lesson.



Quiz

Which of the following statements about the classic reporting paradigm are not true?

- a. It combines data definition (query), layout format, and translation in a single source file, enabling rapid development.
- b. It uses multiple tools that often complicate infrastructure and increase maintenance costs.
- c. It does not require a reporting team to develop and maintain reports. (In other words, end users can do these tasks.)
- d. It may not always meet all the business document requirements.



Quiz

Which statements about BI Publisher are true?

- a. It can extract data from multiple data sources, such as any database or BI Server, but cannot extract data from RSS feeds.
- b. It separates the data, layout, and translation logic at design time, enabling rapid development.
- c. It cannot use Essbase as a data source.
- d. It is available as a component of Oracle BI Enterprise Edition, and as a stand-alone product.



Summary

In this lesson, you should have learned how to:

- Describe the evolving role of BI and Oracle BI solutions
- Explain BI in the context of Oracle Fusion Middleware
- Explain business document requirements and limitations of classic reporting tools
- Describe the uses of BI Publisher and its advantages over classic reporting tools
- List the products integrated with BI Publisher
- List the key features of BI Publisher

Practice 2: Overview

This practice tests your knowledge of BI Publisher.



3. BI Publisher:

Technology and Architecture

Objectives

After completing this lesson, you should be able to describe the following:

- BI Publisher elements:
 - Components
 - Architecture
 - Technology
- Advantages of using BI Publisher

Revisiting BI Publisher

- BI Publisher is a Java-based web application that is available:
 - As a stand-alone product
 - As part of Oracle BI EE
 - With Oracle applications products, including E-Business Suite, PeopleSoft, and JD Edwards
- It provides:
 - A template-based, easy-to-use reporting and publishing solution
 - Tools to rapidly develop and maintain reports
 - A rich set of Java APIs and web services for custom solutions

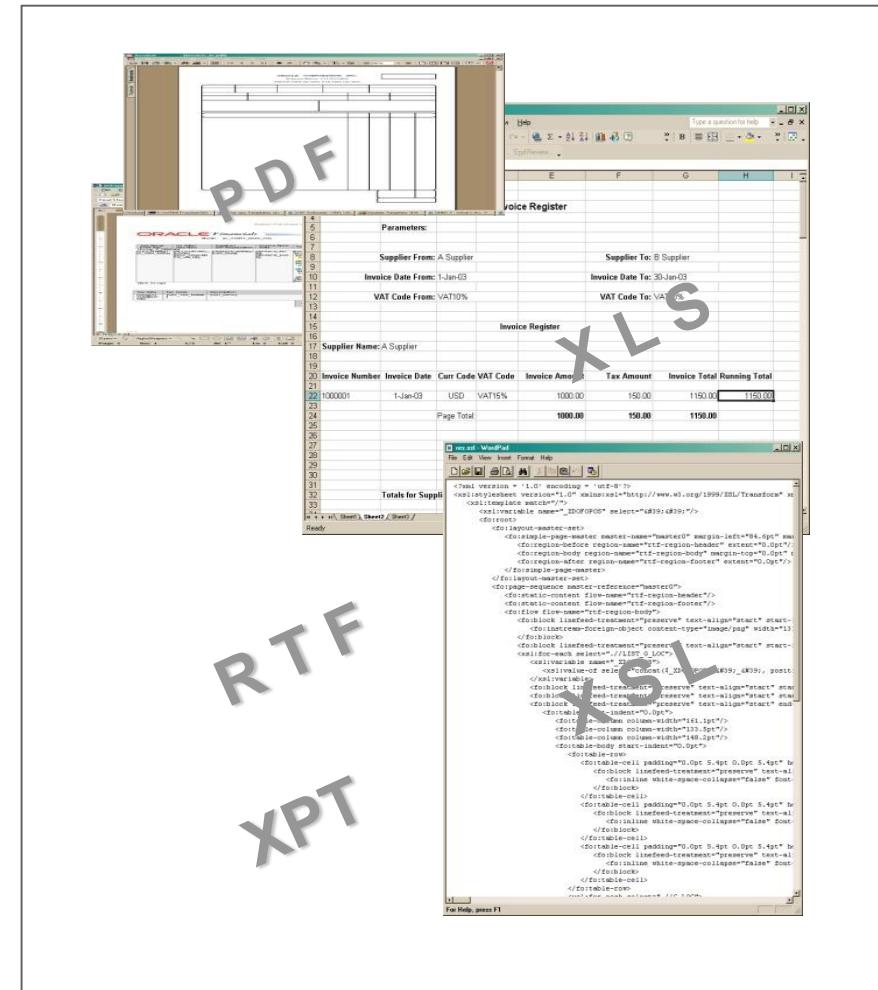
BI Publisher Functional Components

- BI Publisher Server
- Data model editor
- Report Editor
 - Create Report Wizard
- Layout Editor
- Template Builder (MS Word and MS Excel Add-In)

BI Publisher Layout Templates

Industry-standard templates in various formats can be created by using the following:

- Desktop applications
 - Adobe Professional
 - MS Word (Template Builder)
 - MS Excel (Template Builder)
 - Text editors (XSL)
- Layout Editor (online or connected mode)
 - XPT files



BI Publisher Multitier Architecture

Client



- Browser
- Template Builder
- MS Word
- MS Excel
- Adobe Acrobat (for viewing reports in PDF format)

Middle Tier



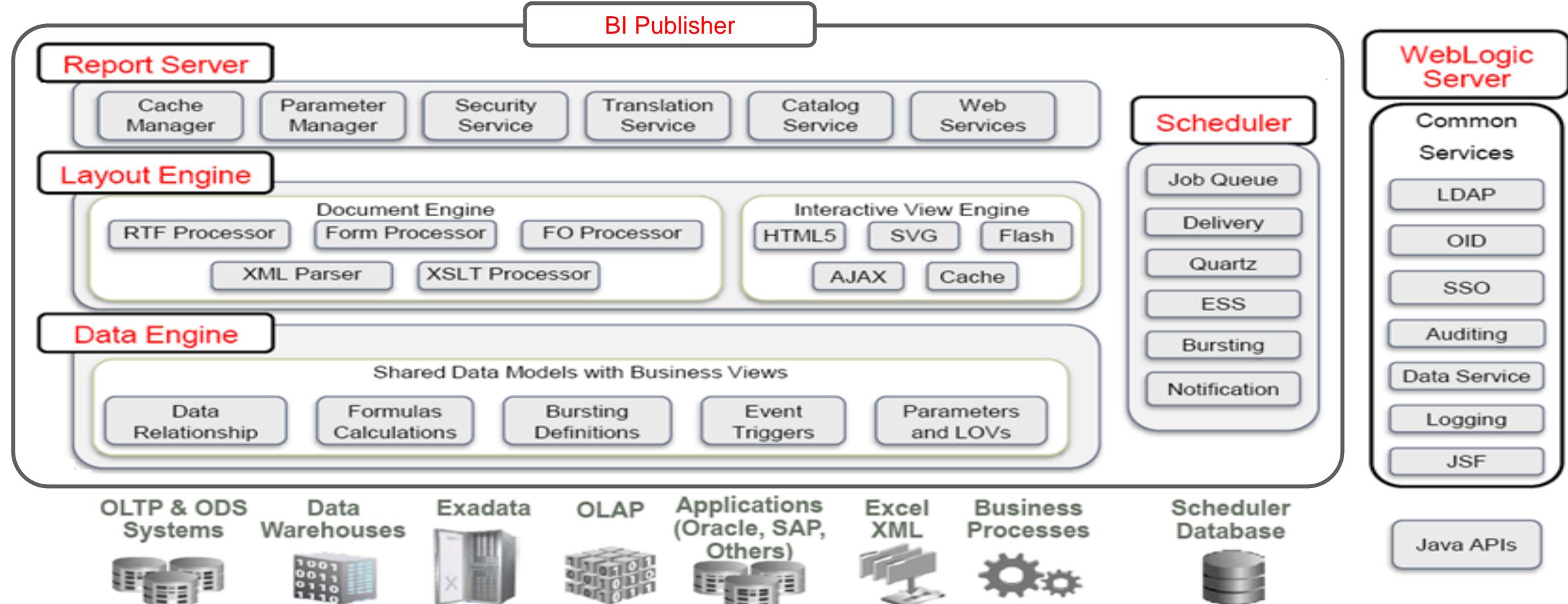
- WebLogic Server
- Oracle BI Publisher Enterprise

Data Tier



- Databases: Oracle, DB2, SQL Server, MySQL, and Sybase
- Other Data Sources: Essbase, web services, RSS feeds, and so on

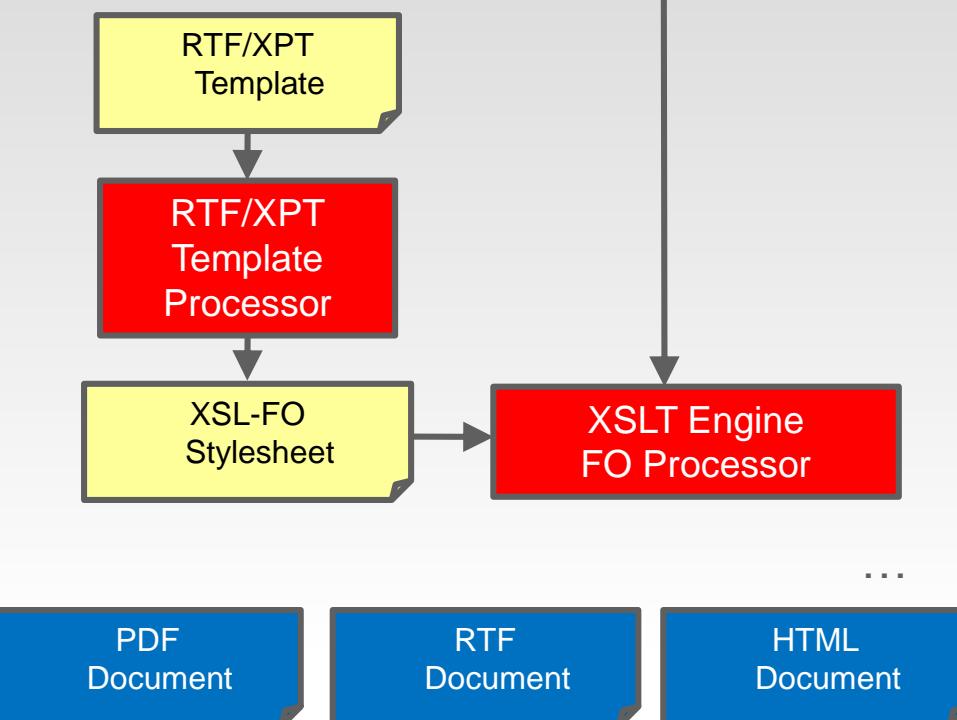
BI Publisher Enterprise Server Architecture



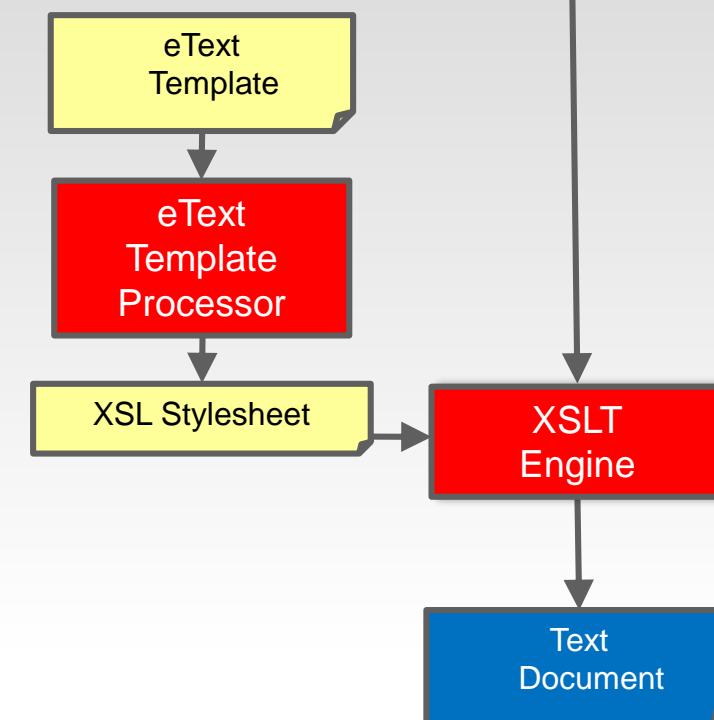
BI Publisher Document Generation Process

XML Data

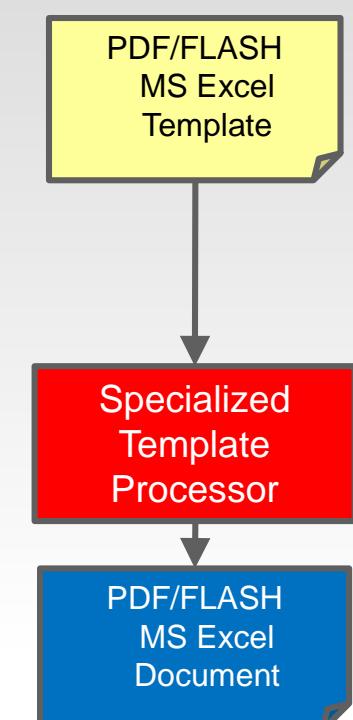
1. Main Flow



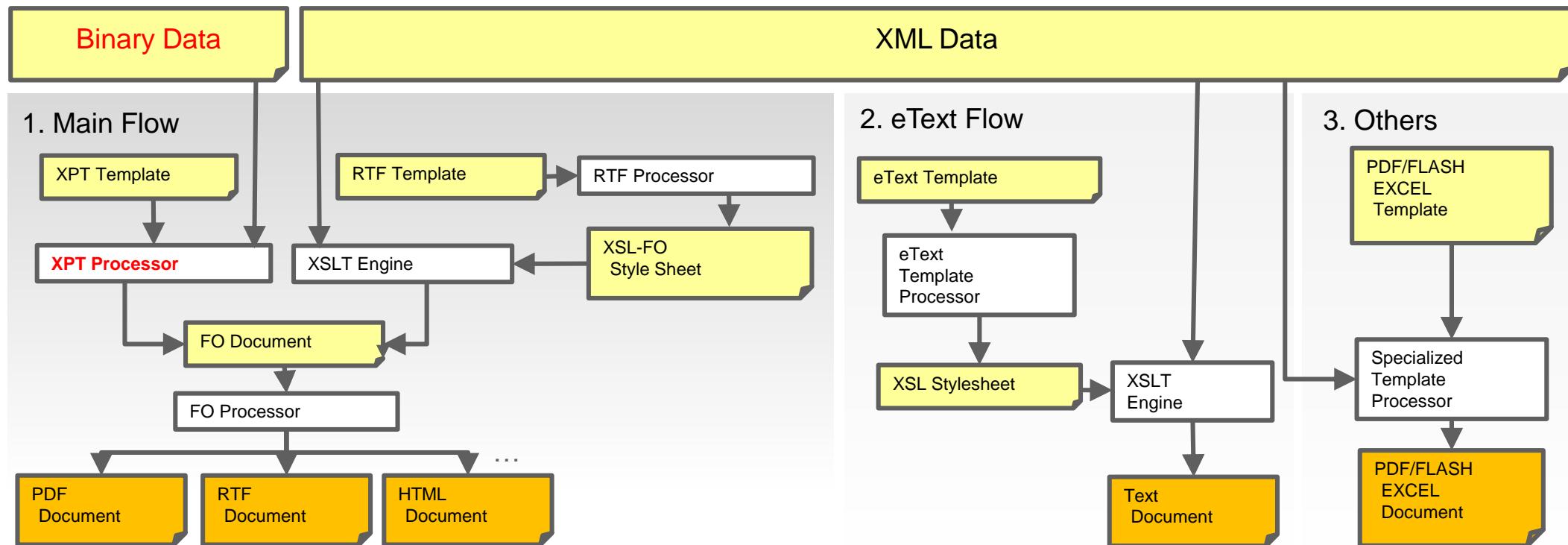
2. eText Flow



3. Others



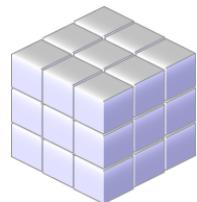
BI Publisher Document Generation Process



BI Publisher Supported Data Sources



Oracle,
Oracle BI EE,
Oracle BI Apps
SQL Server



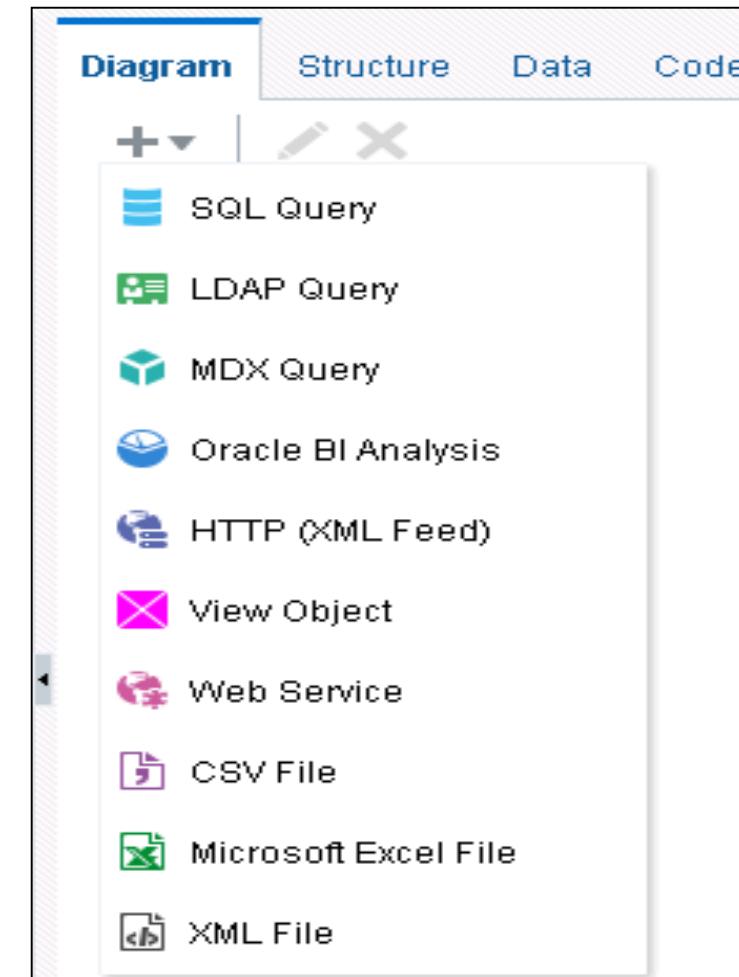
OLAP (Essbase,
MS Analysis Services, SAP
BW)



E-Business Suite,
PeopleSoft,
Siebel, JDE, Primavera



Web services



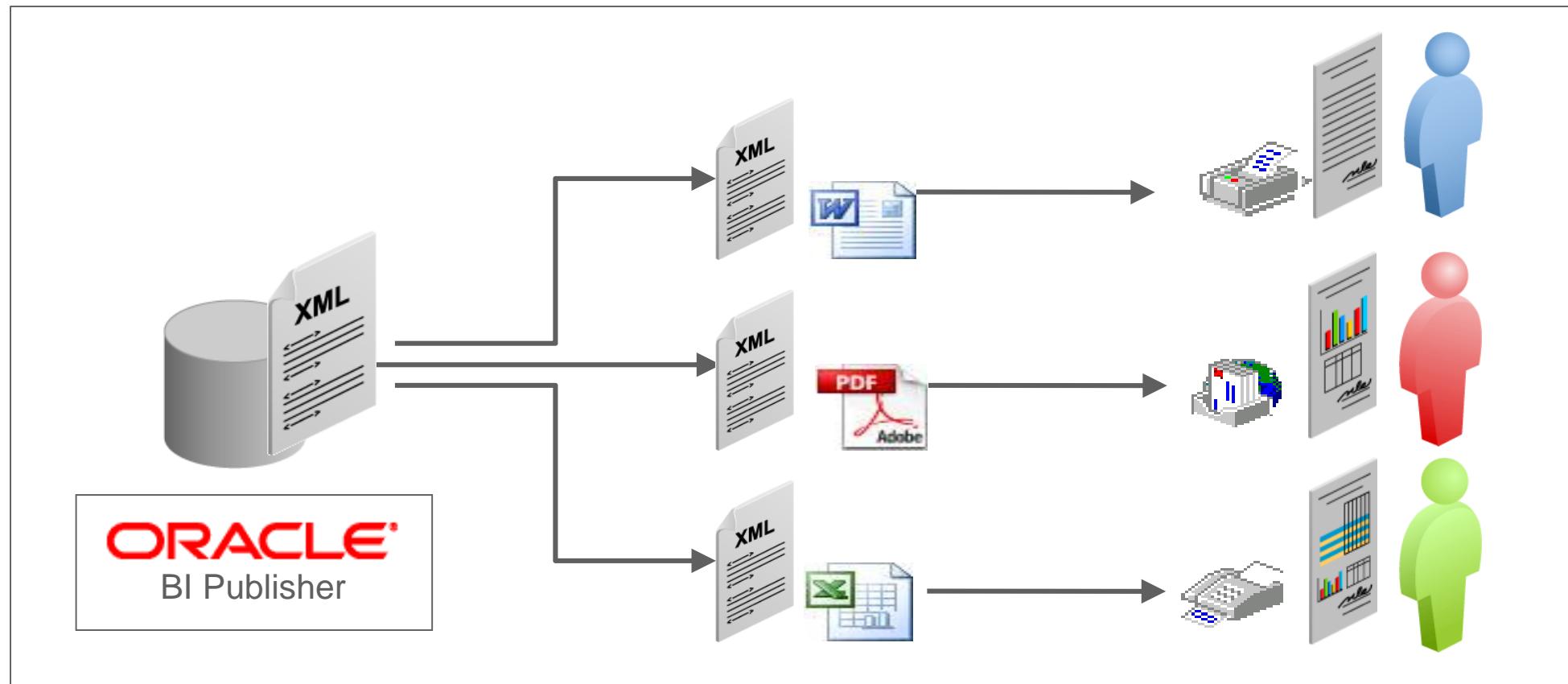
BI Publisher Underlying Technology

Open-standards technologies:

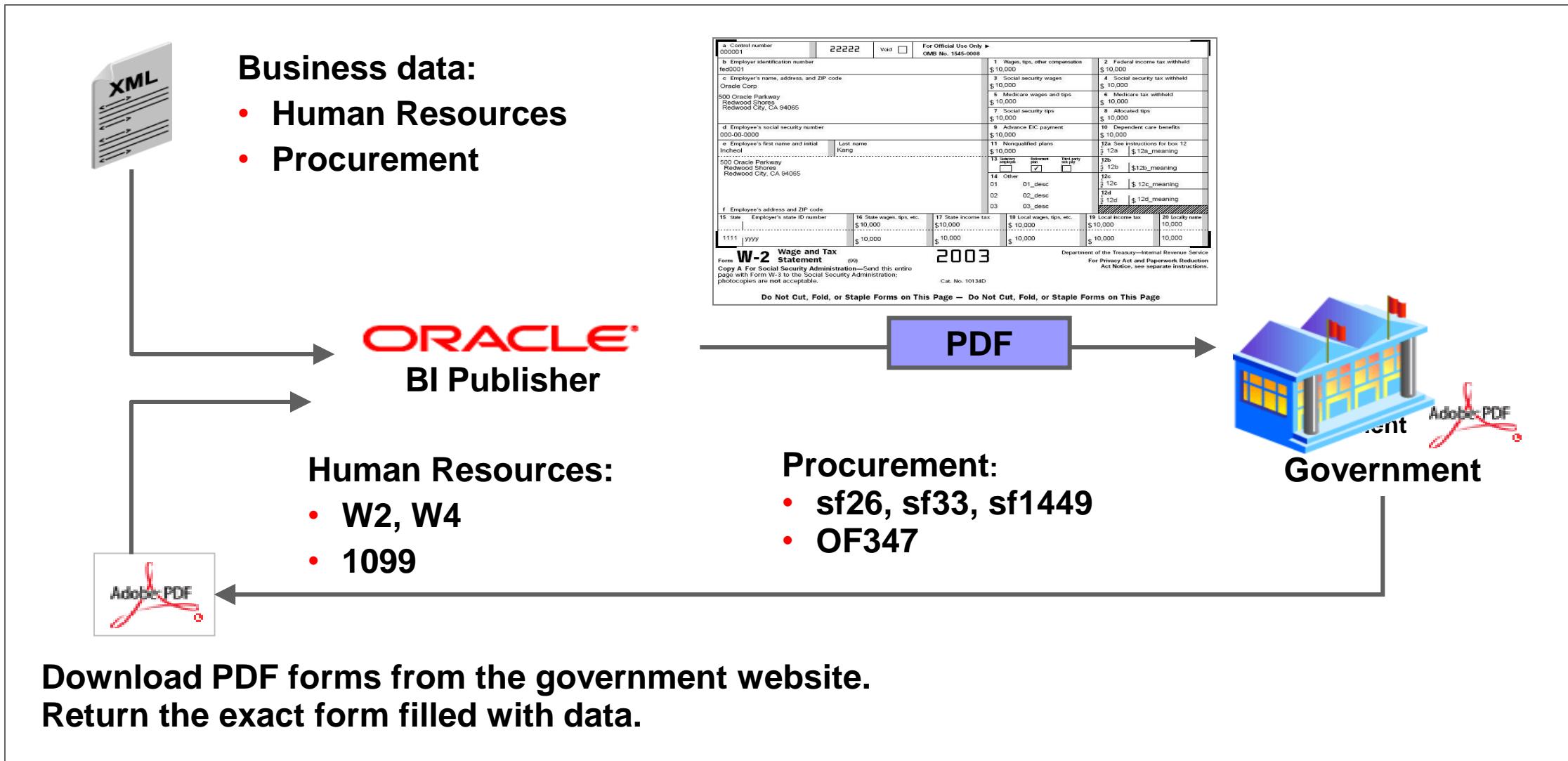
- W3C XSL-FO implementation
- Pure Java
- Pluggable data in XML
- Output formats in PDF, RTF, HTML, interactive
- Support for Internet Printing Protocol, WebDAV, Internet Fax Protocol, and Simple Mail Transfer Protocol (SMTP)

BI Publisher Bursting: Overview

Bursting is the process of generating multiple documents from a batch report and delivering each document to a different destination.



Downloading Government Forms



Performance and Scalability

Stream-based implementation:

- Reduces memory footprint
- Handles large XML input files
- Is the fastest XSL-FO implementation

Internationalization and Language Support

- No need for expensive, language-specific printers
- Full set of Unicode fonts supplied with BI Publisher
- Scalable fonts embedded with CID-mapping tables
- Supports 185 languages and 244 territories
- Templates created for any language or territory

Возвращение Ян Ливэя в Пекин	Russian Chinese GBK	“ 杨利伟表现超 乎预料 ”	Hebrew	אינטראקט מאפש
UNICODE SUPPORT	Le Président chinois Hu Jintao	French Chinese Big5 Vietnamese	“ 楊利偉表現 超乎預料 ”	Cách đánh chữ Việt trong
أصدرت إدارة البريد الحكومية في بكين	หากท่านไม่คุณ กับการค้นคว้า ด้วยทักษะมาย ทางออนไลน์ มีปัญหาและ ต้องว่า	Economía china mantiene rápido crecimiento, informe de APEC	Arabic Thai Spanish Greek	Διαβάστε και στ ελτε emails από ο οπουδήποτε στον
Japanese	秋の学園祭 特集	Turkish Korean	danışma ve denetim birimlerinden	교수님~ 이번'레 포트'꼭 A+주셔 야해요

BI Publisher Output Formats

- BI Publisher is a complete document generation solution.
- BI Publisher supports the following formats:
 - Interactive (HTML 5)
 - Rich text format (RTF)
 - Excel (XLS)
 - Portable document format (PDF)
 - eText (used with EDI and EFT)
 - HTML
 - XML
 - Flash
 - CSV
 - PowerPoint

Quiz: Overview

This quiz examines your knowledge of the concepts discussed in the lesson.

Quiz

BI Publisher is a pure Java-based web application that is available both as a stand-alone product and as part of Oracle BI EE and Oracle applications products.

- a. True
- b. False

Quiz

Template Builder is a design tool to create and publish report layouts from within the BI Publisher interface.

- a. True
- b. False

Summary

In this lesson, you should have learned how to describe the following:

- BI Publisher elements:
 - Components
 - Architecture
 - Technology
- Advantages of using BI Publisher

Practice 3: Overview

This practice tests your knowledge of BI Publisher concepts.

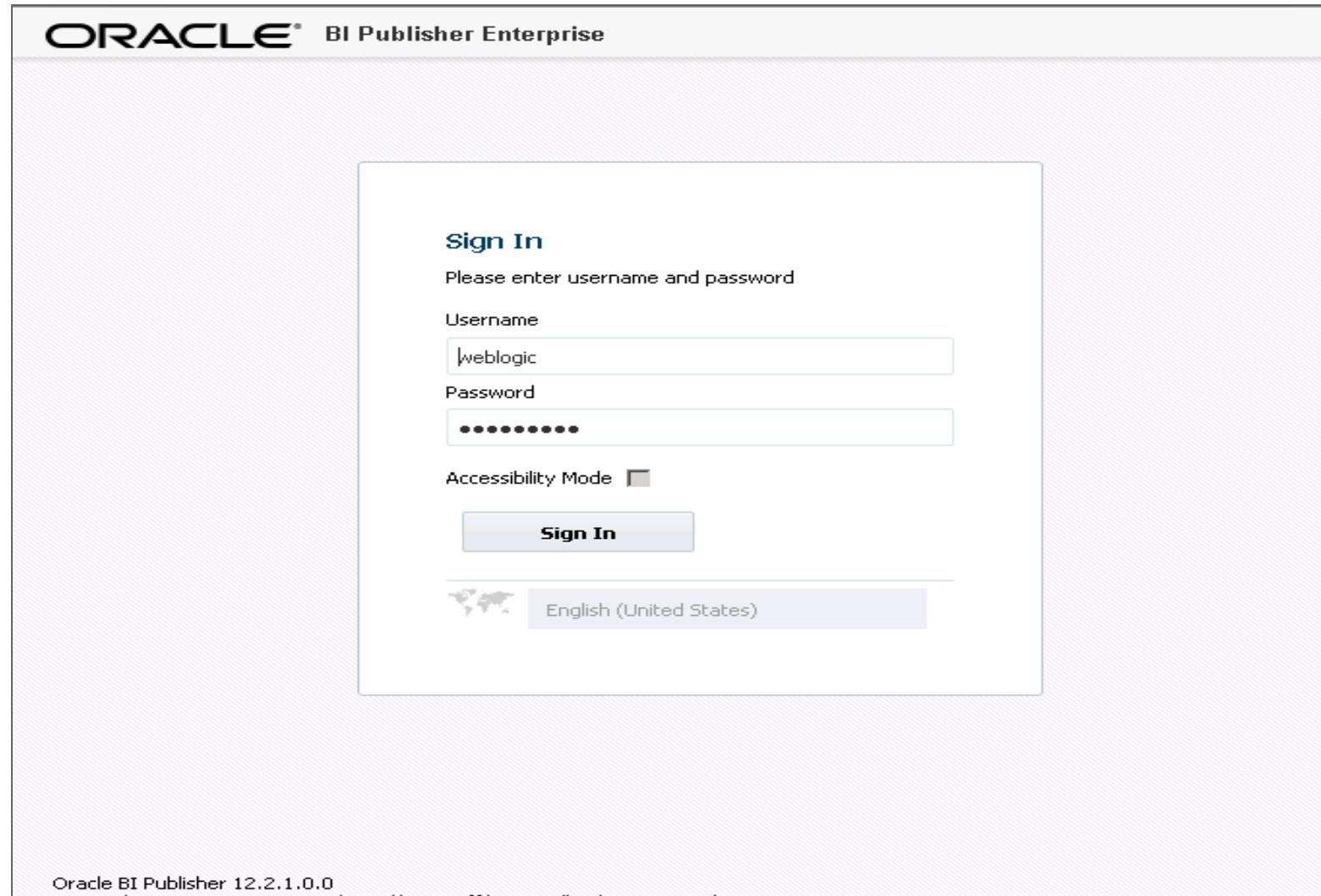
4. Getting Started with BI Publisher

Objectives

After completing this lesson, you should be able to do the following:

- Log in to BI Publisher
- Browse the Catalog and view Catalog objects
- Manage the Catalog objects
- Manage favorites
- Create a simple report based on a predefined data model using the Report Wizard
- View the reports
- Configure report parameters and set report properties

Logging In to BI Publisher



BI Publisher Home Page

The screenshot shows the Oracle BI Publisher Enterprise Home Page. The interface includes a top navigation bar with links for File, Edit, View, History, Bookmarks, Tools, and Help. A search bar is located at the top right. Below the header, the page title is "Oracle BI Publisher : Home" and the URL is "localhost:9502/xmlpserver/servlet/home". On the left, there's a sidebar with sections for "Create...", "Recent", "Reports", "Others", and "Favorites" (with a "Manage" link). Two specific sections are highlighted with red boxes: "Create..." and "Browse/Manage...". A dropdown menu is open under the "Search" field, showing options: All, Folders, Reports, Data Models, Style Templates, and Sub Templates. A purple callout labeled "Global Header" points to the top navigation bar. Another purple callout labeled "Search" points to the search bar.

Create...

- Report
- Report Job
- Data Model

More ▾

Browse/Manage...

- Catalog Folders
- Report Jobs
- Report Job History

Search All

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

Global Header

Search

BI Publisher Home Page



BI Publisher Global Header

The screenshot shows the BI Publisher Enterprise interface. The top navigation bar includes the ORACLE BI Publisher Enterprise logo, a search bar, administration, help, sign out, and other navigation links. A red box highlights the 'Catalog' tab in the top navigation bar. The left sidebar has sections for 'Folders' and 'Tasks'. Under 'Folders', 'My Folders' is selected and expanded, showing sub-folders like Shared Folders, Components, Sample Lite, etc. Under 'Tasks', there are options for My Folders, such as Expand, Upload, Delete, Download, Copy, Paste, Permissions, Properties, and Export XLIFF. The main content area displays a list of folders: Temp (Last Modified 7/31/18 8:34 PM, Created By weblogic), Drafts (Last Modified 8/4/16 6:41 AM, Created By weblogic), and weblogic (Last Modified 4/28/16 8:37 AM, Created By System Account). Each folder entry includes 'Expand' and 'More' options.

ORACLE® BI Publisher Enterprise

Catalog

Home Catalog New Open Signed In As weblogic

Location /My Folders

Folders

- ▶ My Folders
- ◀ Shared Folders
 - ▶ Components
 - ▶ Sample Lite
 - ▶ Shared Folders
 - ▶ weblogic

Tasks

My Folders

- Folder Expand
- Upload
- X Delete
- Download
- Copy
- Cut
- Paste
- Rename
- Permissions
- Properties
- Export XLIFF

Temp Last Modified 7/31/18 8:34 PM Created By weblogic
Drafts Last Modified 8/4/16 6:41 AM Created By weblogic
weblogic Last Modified 4/28/16 8:37 AM Created By System Account

BI Publisher Global Header

The screenshot displays two instances of the BI Publisher Enterprise interface, illustrating the global header's effect on the user interface.

Top Catalog View: The global header "Catalog" is present above the menu bar. A context menu is open over the "New" button, which is highlighted with a red box. The menu items shown are:

- Open... (highlighted)
- Report Jobs
- Report Job History

Bottom Catalog View: The global header "Catalog" is present above the menu bar. A context menu is open over the "New" button, which is highlighted with a red box. The menu items shown are:

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

Folders Sidebar: Both views show a sidebar titled "Folders" containing "My Folders" and "Shared Folders".

Toolbar: Both views feature a standard toolbar with icons for creating, deleting, and navigating.

Location Bar: Both views have a "Location" bar showing the path "/My Folders".

Content Area: Both views display a list of folders, including "Temp", "Drafts", and "weblogic".

Setting Account Preferences

The screenshot shows the Oracle BI Publisher Enterprise interface. At the top, there's a navigation bar with 'ORACLE® BI Publisher Enterprise', a search bar ('Search All'), and links for 'Administration', 'Help', and 'Sign Out'. Below the navigation bar, the main menu includes 'Home', 'Catalog', 'New', 'Open', 'Signed In As' (set to 'weblogic'), and 'My Account'.

The 'My Account' dialog is open in the center. It displays the user information: 'User ID: weblogic' and 'Display Name: weblogic'. There are two tabs: 'General' (selected) and 'My Groups'. Under 'General', settings include 'Report Locale: English (United States)', 'UI Language: English (United States)', 'Time Zone: [GMT+00:00] Casablanca', 'Accessibility Mode' (radio buttons for 'On' and 'Off' - 'Off' is selected), and an 'Email Addresses' field which is empty. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

A red arrow points from the 'My Account' link in the top menu to the 'My Account' dialog, indicating the path to access account settings.

Browsing the Catalog

The screenshot shows the Oracle BI Publisher Enterprise interface. The top navigation bar includes the Oracle logo, 'BI Publisher Enterprise', a search bar, and links for 'Administration', 'Help', and 'Sign Out'. The main title 'Catalog' is highlighted with a red box. Below the title is a toolbar with various icons. The left sidebar has sections for 'Folders' and 'Tasks'. The 'Folders' section lists 'My Folders', 'Shared Folders' (with 'Components' and 'Sample Lite' expanded), and 'Published Reporting' (which is selected and expanded, showing 'Analyses', 'Data Models', 'JDE Samples', 'Reports', and 'Style Templates'). The 'Tasks' section shows a task for 'Published Reporting' with 'Expand' and 'Upload' buttons. On the right, there is a 'Location' dropdown menu with several options: '/Shared Folders/Sample Lite/Published Reporting' (selected and highlighted in blue), '/Shared Folders/Sample Lite/Published Reporting', '/Shared Folders/Sample Lite', '/Shared Folders', and '/My Folders'.

BI Publisher Repository Object Types

- Folders
- Data models
- Reports
- Style templates
- Sub templates

The screenshot shows the Oracle BI Publisher Enterprise Catalog interface. The top navigation bar includes the Oracle logo, 'BI Publisher Enterprise', a search bar ('Search All'), and links for 'Administration', 'Help', 'Sign Out', and user information ('Signed In As weblogic'). The main area is titled 'Catalog' with tabs for 'Home', 'Catalog', 'New', 'Open', and 'Signed In As'. A location bar shows the path '/Shared Folders/Sample Lite/Published Reporting/Reports'. On the left, a sidebar titled 'Folders' lists 'Sample Lite' with sub-folders 'Subject Area Contents', 'KPIs', 'Published Reporting' (which is expanded to show 'Analyses', 'Data Models', 'JDE Samples', 'Reports' - this folder is selected and highlighted in blue), and 'Style Templates'. Below the folder list is a 'Tasks' section with buttons for 'Reports', 'Expand', 'Upload', 'Delete', 'Download', 'Copy', 'Cut', 'Paste', 'Rename', 'Permissions', 'Properties', and 'Export XLIFF'. The main content area displays a list of published reporting objects:

- Balance Letter** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Model: Balance Letter Data Model --Layouts: RTF, XPT -- Features: Style Template
Open Schedule Jobs Job History Edit More
- Brand Revenue Details** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Model: Product Sales Details DM --Layouts: XPT --Features: Drillable charts
Open Schedule Jobs Job History Edit More
- Company Sales - Currency Based** Last Modified 4/28/16 6:52 AM Created By weblogic
Uses currency exchange rates stored in a XLS file to convert revenue coming from Bi Server from USD to other types of currencies.
Open Schedule Jobs Job History Edit More
- Company Sales Report** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Model: Office Sales Report Data Model --Layouts: XPT, RTF --Features: Drillable charts, Style Template, Parameters, Radio button LOV display
Open Schedule Jobs Job History Edit More
- Product Listing** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Model: Product List DM --Layouts: XPT
Open Schedule Jobs Job History Edit More
- Product Sales - OBIEE Semantic Layer** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Source: Direct connection to OBIEE Sample Sales Lite subject area. Features: List filters, Interactive charts.
Open Schedule Jobs Job History Edit More
- Salary Report - Checkboxes** Last Modified 7/10/18 10:51 PM Created By weblogic
Data Model: Salary Parameter Datamodel (Requires that the "demo" JDBC connection in BI Publisher is set up.) Features: Multiple layout types; Cascading Parameters using checkboxes to display LOVs; Bursting
Open Schedule Jobs Job History Edit More

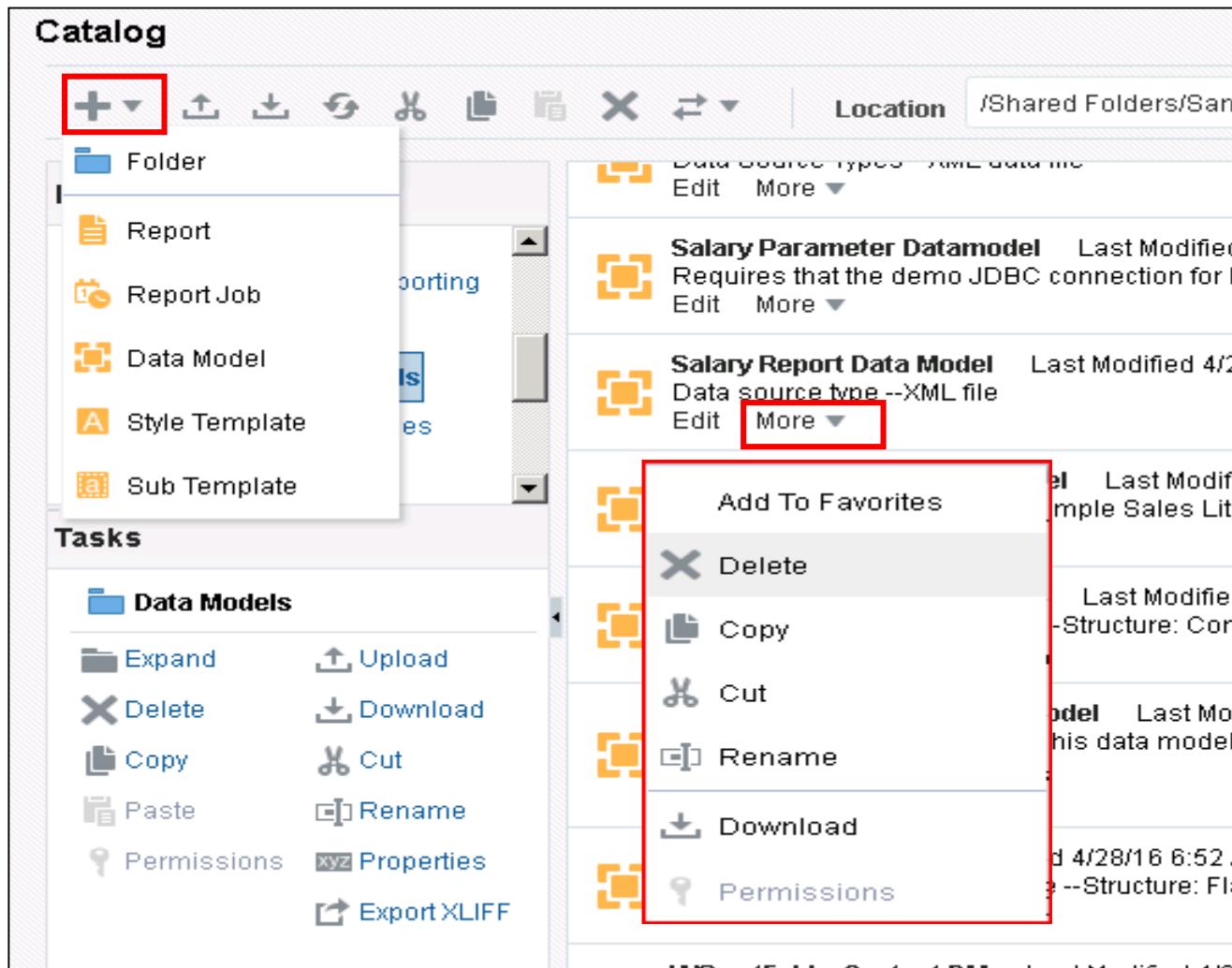
Viewing Reports

The screenshot shows the Oracle BI Publisher Enterprise Catalog interface. The top navigation bar includes the Oracle logo, 'BI Publisher Enterprise', a search bar, and links for 'Administration', 'Help', and 'Sign Out'. The main area is titled 'Catalog' with a toolbar containing icons for file operations like Open, Save, Print, and Refresh. A 'Location' bar shows the path '/Shared Folders/Sample Lite/Published Reporting/Reports'. On the left, a sidebar has 'Folders' expanded, showing 'Sample Lite' with 'Subject Area Contents', 'KPIs', and 'Published Reporting'. Under 'Tasks', there's a 'Reports' section with options like 'Expand', 'Upload', 'Download', 'Copy', 'Paste', 'Permissions', and 'Export XLIFF'. The main content area displays two reports: 'Product Sales - OBIEE Semantic Layer' and 'Salary Report - Checkboxes'. The 'Salary Report - Checkboxes' report is selected, with its details shown: Data Model: Salary Parameter Datamodel, Last Modified 7/10/18 10:51 PM, Created By weblogic. It features multiple layout types, cascading parameters using checkboxes to display LOVs, and bursting. The 'Open' link in the report's action bar is highlighted with a red box. Below the report details, a preview window shows the report's layout with tabs for 'Simple', 'Advanced Page Totals', 'Batch Manager Salary', 'W-2 2010 (Partial)', and 'Manager Summary'. The preview also shows the title 'Salary Report' and a table of employee salaries.

Salary Report - Checkboxes Last Modified 7/10/18 10:51 PM Created By weblogic
Data Model: Salary Parameter Datamodel (Requires that the "demo" JDBC connection in BI Publisher is set up.) Features: Multiple layout types; Cascading Parameters using checkboxes to display LOVs; Bursting

Name	Job Title	Manager	Department	Salary
Jennifer Whalen	Administration Assistant	Neena Kochhar	Administration	4,400.00
Michael Hartstein	Marketing Manager	Steven King	Marketing	13,000.00
Pat Fay	Marketing Representative	Michael Hartstein	Marketing	6,000.00
Den Raphaely	Purchasing Manager	Steven King	Purchasing	11,000.00
Alexander Khoo	Purchasing Clerk	Den Raphaely	Purchasing	3,100.00
Shelli Baida	Purchasing Clerk	Den Raphaely	Purchasing	2,900.00
Sigal Tobias	Purchasing Clerk	Den Raphaely	Purchasing	2,800.00
Guy Himuro	Purchasing Clerk	Den Raphaely	Purchasing	2,600.00
Karen Colmenares	Purchasing Clerk	Den Raphaely	Purchasing	2,500.00
Susan Mavris	Human Resources Representative	Neena Kochhar	Human Resources	6,500.00
Matthew Weiss	Stock Manager	Steven King	Shipping	8,000.00

Managing Repository Objects



- Creating folders
- Other tasks against Catalog objects:
 - Adding to Favorites
 - Copying and pasting
 - Renaming and deleting
 - Downloading and uploading

Managing Favorites

The screenshot shows the Oracle BI Catalog interface. The top navigation bar includes Home, Catalog, New, Open, Signed In As (weblogic), and Help. The Location bar shows the path /Shared Folders/Sample Lite/Published Reporting/Reports.

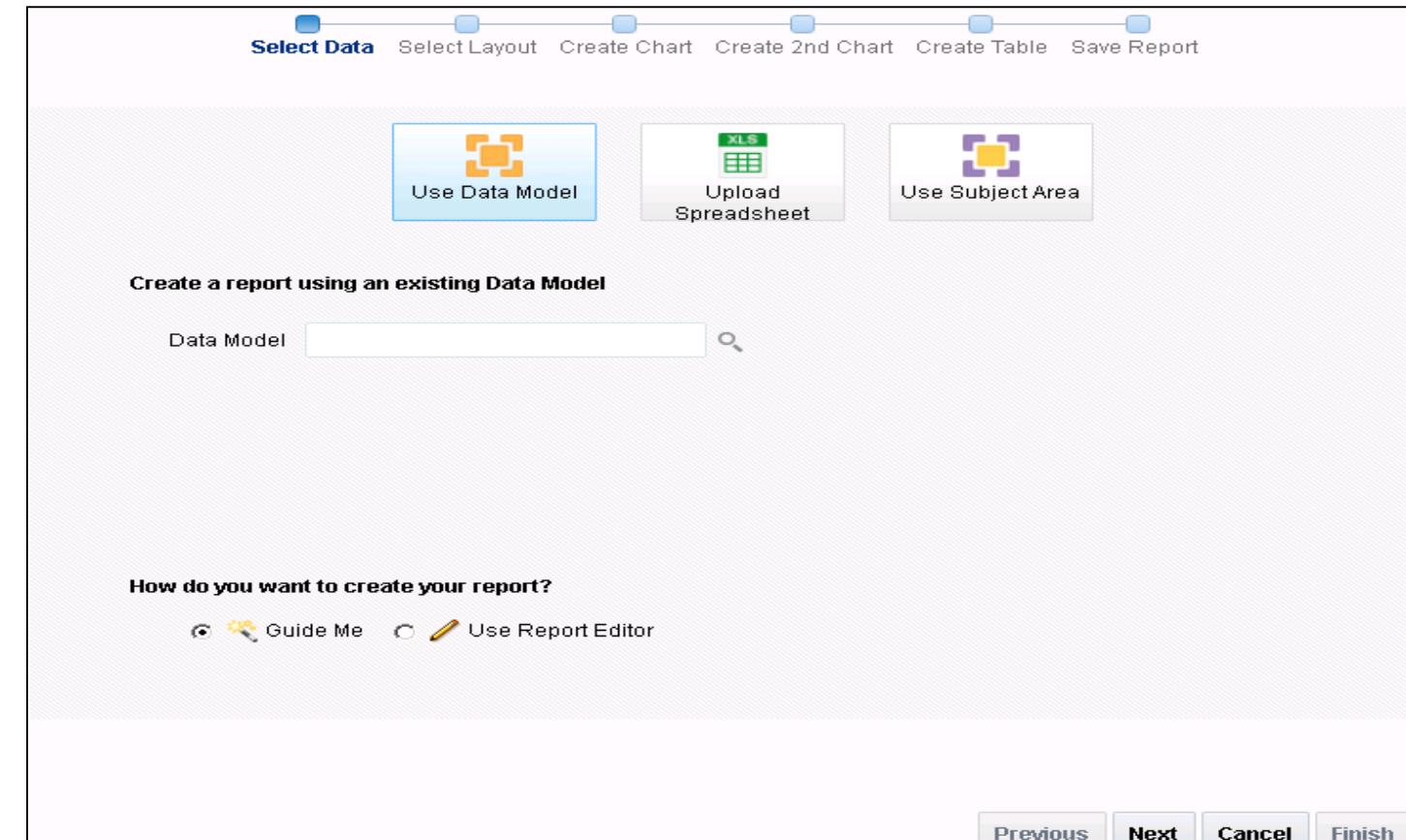
The left sidebar contains a 'Folders' section with JDE Samples and Reports. The main content area displays two reports: 'Balance Letter' and 'Brand Revenue Details'. The 'More' dropdown menu for 'Balance Letter' is open, showing options like Schedule, History, and Remove. A red box highlights the 'More' dropdown for 'Balance Letter', and another red arrow points from it to the 'Add To Favorites' option in the context menu for 'Brand Revenue Details'.

The right sidebar features a 'Home' section with Create... (Report, Report Job, Data Model), Recent Reports, and a Favorites section. The Favorites section has a 'Manage' button highlighted with a red box. A context menu is open over the 'Balance Letter' entry in the Favorites list, showing options like Schedule, History, and Remove.

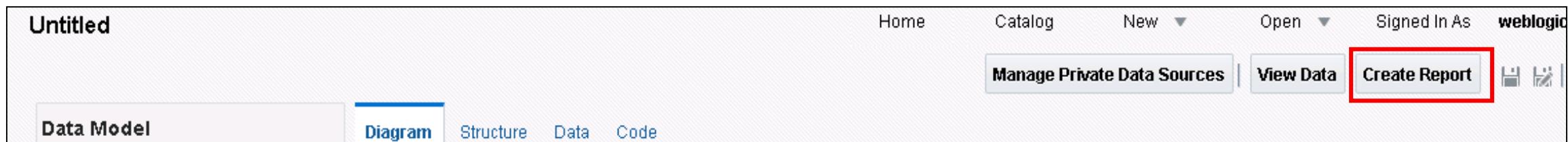
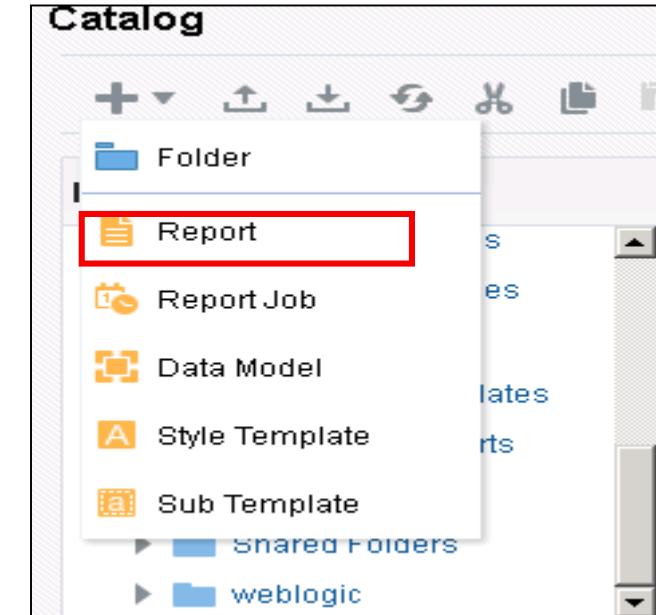
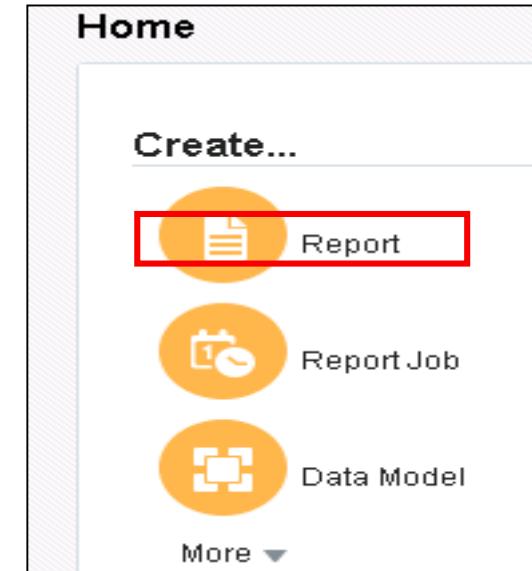
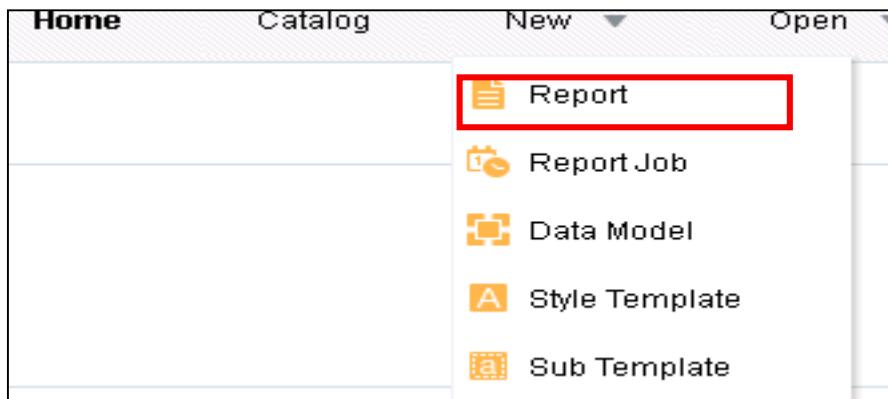
The bottom sidebar includes Browse/Manage... (Catalog Folders, Report Jobs, Report Job History) and a search bar.

Creating Reports: Overview

- Guide Me
- Use Report Editor

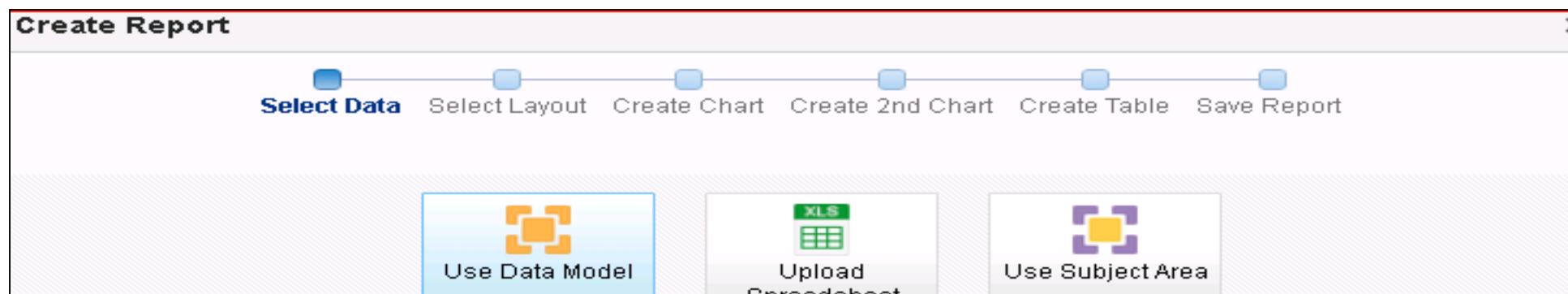


Launching the Report Wizard



Step 1 – Select Data

- Use Data Model
- Upload Spreadsheet
- Use Subject Area



Step 1 – Options: Use Data Model

Create Report

Select Data Select Layout Create Chart Create 2nd Chart Create Table Save Report

Use Data Model **Upload Spreadsheet** **Use Subject Area**

Create a report using an existing Data Model

Data Model /Sample Lite/Published Reporting/Da 

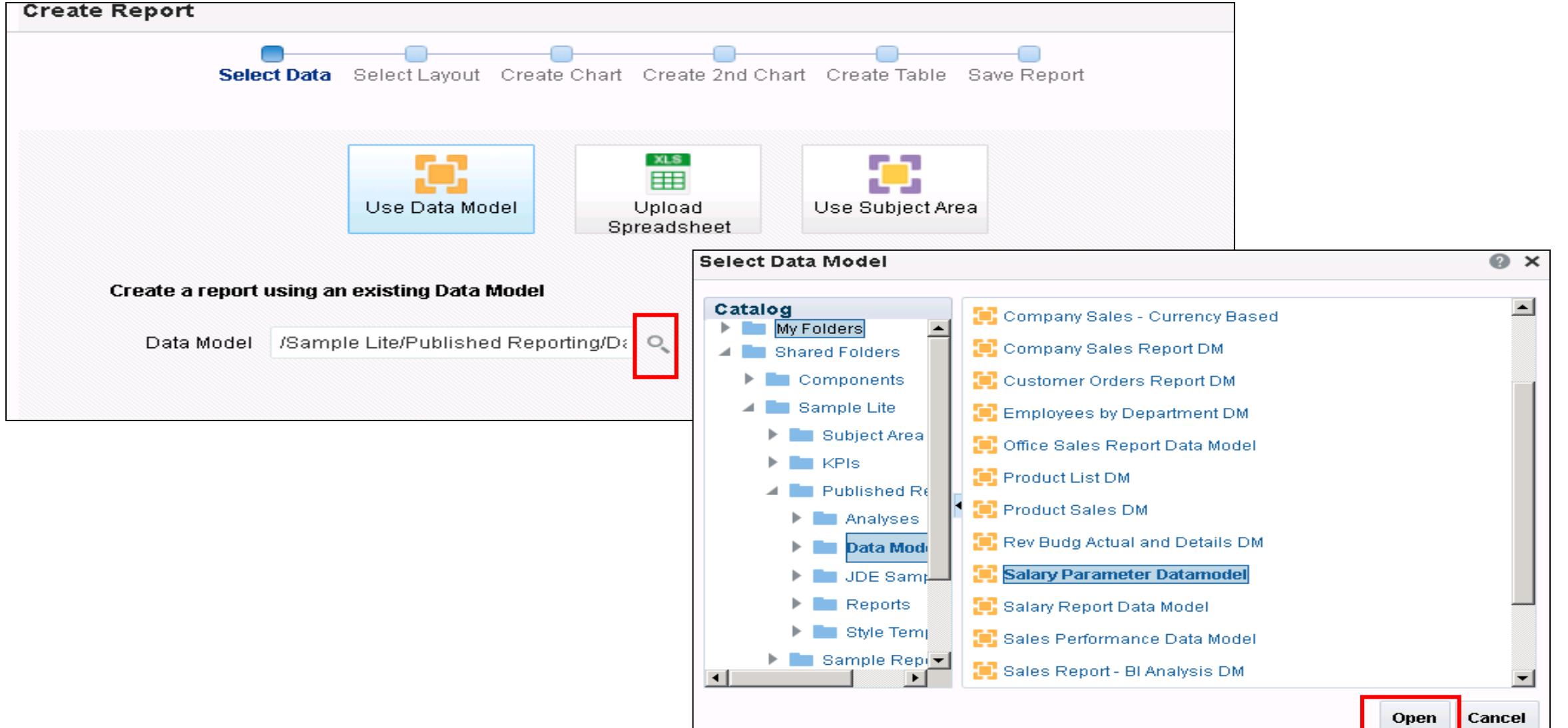
Select Data Model

Catalog

- ▶ My Folders
- ◀ Shared Folders
 - ▶ Components
 - ◀ Sample Lite
 - ▶ Subject Area
 - ▶ KPIs
 - ◀ Published Re
 - ▶ Analyses
 - ▶ **Data Model**
 - ▶ JDE Samp
 - ▶ Reports
 - ▶ Style Tem
 - ▶ Sample Rep

- ▶ Company Sales - Currency Based
- ▶ Company Sales Report DM
- ▶ Customer Orders Report DM
- ▶ Employees by Department DM
- ▶ Office Sales Report Data Model
- ▶ Product List DM
- ▶ Product Sales DM
- ▶ Rev Budg Actual and Details DM
- ▶ **Salary Parameter Datamodel**
- ▶ Salary Report Data Model
- ▶ Sales Performance Data Model
- ▶ Sales Report - BI Analysis DM

Open **Cancel**



Step 1 – Options: Upload Spreadsheet

Create Report

Select Data Select Layout Create Chart Create 2nd Chart Create Table Save Report

Use Data Model

Upload Spreadsheet

Use Subject Area

Create a report using a spreadsheet that you upload

File **Browse...** No file selected.
You can upload .xls and .xlsx file types.

Create a report using a spreadsheet that you upload

Uploaded File [airlines data.xls](#)

Sheet Name **Sheet1** ▾
Sheet1
Sheet2
Sheet3

File Upload

Computer ▶ WINNT (D:) ▶ MyFiles

Name	Date modified	Type
Advanced Page Totals.rtf	3/26/2011 1:13 AM	Rich Text
Advanced Page Totals.xml	3/5/2011 12:47 AM	XML Doc
airlines data.xls	12/19/2012 2:42 PM	Microsoft
Balance Letter French.rtf	3/1/2013 1:02 PM	Rich Text
Balance Letter.rtf	5/30/2008 11:09 AM	Rich Text
Balance.xml	5/30/2008 11:09 AM	XML Doc
birthdate.csv	12/4/2012 5:53 PM	Microsoft
BurstingDM.xdmz	7/10/2018 9:02 PM	XDMZ File
DMTrigger.xdmz	1/4/2013 3:36 AM	XDMZ File
Emp Salary Template.rtf	4/25/2011 9:24 PM	Rich Text
Manager Financials Report.rtf	10/25/2011 4:53 PM	Rich Text

File name: All Files (*.*)

Step 1 – Options: Use Subject Area

Create Report

Select Data Select Layout Create Chart Create 2nd Chart Create Table Save Report

 Use Data Model  Upload Spreadsheet  Use Subject Area

Create a report using a BI Subject Area

Subject Area A - Sample Sales ▼

A - Sample Sales
B - Sample Costs

Creating a Report Using the *Guide Me* Workflow

Select Data Select Layout Create Chart Create 2nd Chart Create Table Save Report

Use Data Model

Upload Spreadsheet

Use Subject Area

Create a report using an existing Data Model

Data Model

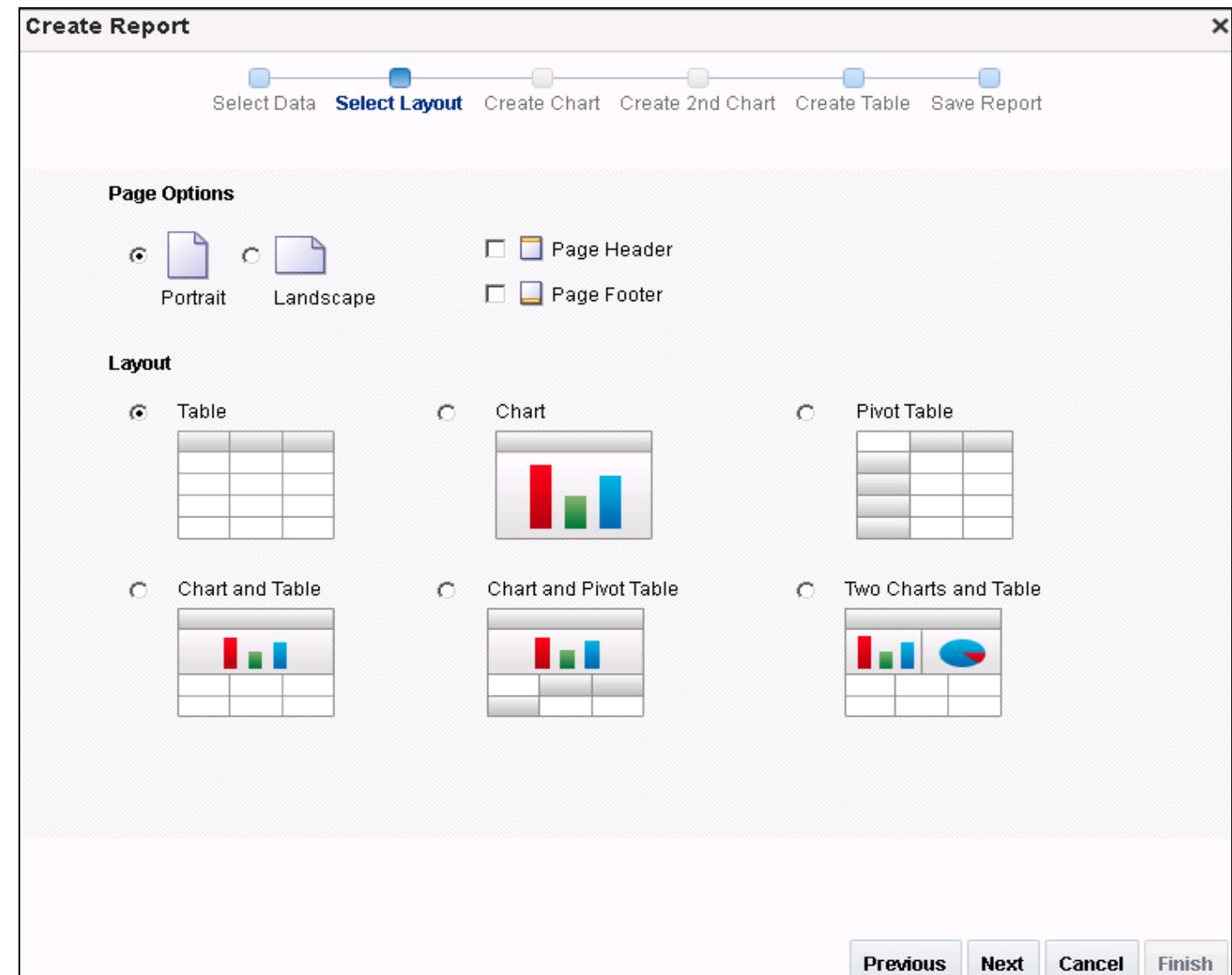
How do you want to create your report?

Guide Me Use Report Editor

Previous **Next** Cancel Finish

Step 2 – Select Layout

- Page Options
 - Portrait
 - Landscape
 - Page Header
 - Page Footer
- Layout
 - Table
 - Chart
 - Pivot Table
 - Chart and Table
 - Chart and Pivot Table
 - Two Charts and Table



Steps 3 and 4 – Create Chart

Create Report

Select Data Select Layout **Create Chart** Create 2nd Chart Create Table Save Report

Drag fields from the Data Source to create the chart. Sample data is displayed.

Data Source

- ROWSET
 - Employees
 - Full Name
 - First Name
 - Last Name
 - Monthly Salary
 - Annual Salary
 - Federal Tax Withheld
 - Title
 - Department
 - Manager

Chart Area

Annual Salary

Drop Value Here

Drop Label Here

Annual Salary

Department

Drop Series Here

Department	Annual Salary
Purchasing	~300K
Marketing	~200K
Executive	~400K
Public Relations	~100K
Human Resources	~50K
Finance	~600K
Administration	~100K
Accounting	~200K
IT	~400K

Preview Report

Previous Next Cancel Finish

Step 5 – Create Pivot Table

Create Report

Select Data Select Layout Create Chart Create 2nd Chart **Create Table** Save Report

Drag fields from the Data Source to create the pivot table. Sample data is displayed.

Data Source

- ROWSET
 - Employees
 - Full Name
 - First Name
 - Last Name
 - Monthly Salary
 - Annual Salary
 - Federal Tax Withheld
 - Title
 - Department
 - Manager

Pivot Table Preview

	Shipping	Sales	Purchasing	Marketing	Executive
	Annual Salary				
Steven King	436800	732000	132000	156000	4080
Neena Kochhar	0	0	0	0	
Lex De Haan	0	0	0	0	
Alexander Hunold	0	0	0	0	
Nancy Greenberg	0	0	0	0	

Show Row Grand Totals Show Column Grand Totals

Preview

Previous Next Cancel Finish

Step 5 – Create Table

Create Report

Select Data Select Layout Create Chart Create 2nd Chart **Create Table** Save Report

Drag fields from the Data Source to create the table. Sample data is displayed.

Data Source

- ROWSET
 - Employees
 - Full Name
 - First Name
 - Last Name
 - Monthly Salary
 - Annual Salary
 - Federal Tax Withheld
 - Title
 - Department
 - Manager

Department	Manager	Full Name	Annual Salary
Shipping	Steven King	Matthew Weiss	96000
Shipping	Steven King	Adam Fripp	98400
Shipping	Steven King	Payam Kaufling	94800
Shipping	Steven King	Shanta Vollman	78000
Shipping	Steven King	Kevin Mourgos	69600
Sales	Steven King	Gerald Cambrault	132000
Sales	Steven King	Eleni Zlotkey	126000
Sales	Steven King	John Russell	168000
Sales	Steven King	Karen Partners	162000
Sales	Steven King	Alberto Errazuriz	144000
			7924800

Show Grand Totals Row

Previous Report Previous Next Cancel Finish

Step 6 – Save Report

Create Report

Select Data Select Layout Create Chart Create 2nd Chart Create Table **Save Report**

Congratulations. You created your report!

Would you like to view your report or go to the [Report Catalog](#)?

View Report
Run and view the report.

Customize Report Layout
Use the Layout Editor to customize the report.

Save As

Catalog

- ▶ **My Folders**
- ◀ **Shared Folders**
 - ▶ Components
 - ◀ **Sample Lite**
 - ▶ Subject Area
 - ▶ KPIs
 - ◀ **Published Reports**
 - ▶ Analyses
 - ▶ Data Model
 - ▶ JDE Samples
 - ▶ Reports
 - ▶ Style Temp
- ▶ **Temp**
- ▶ **Drafts**
- ▶ **weblogic**

Name _____

Description _____

Save **Cancel**

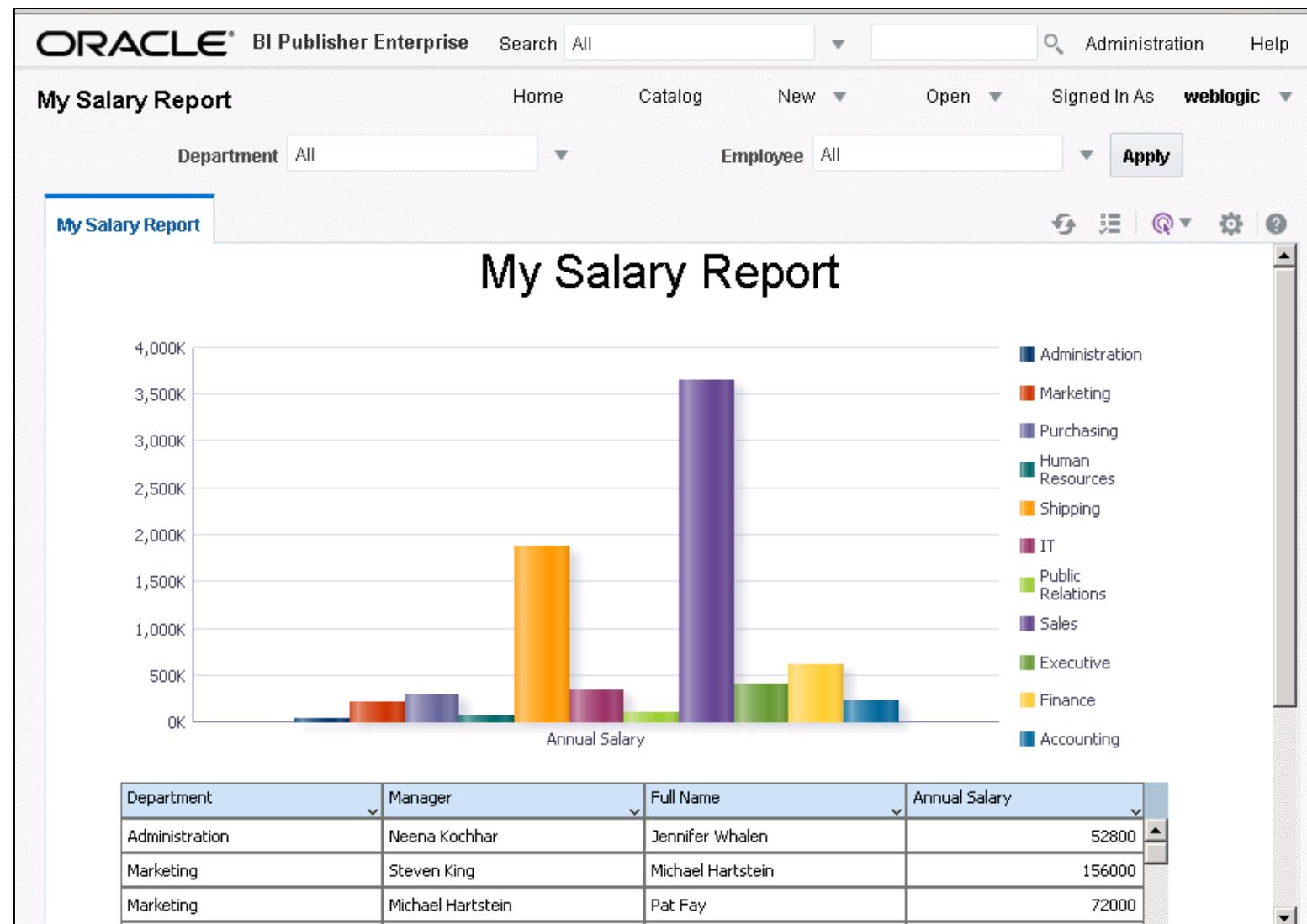
Previous **Next** **Cancel** **Finish**

View Report

Save

Finish

Step 7 – View Report



Editing the Report Layout

The screenshot shows the Oracle BI Publisher interface for editing a report titled "My Salary Report".

Left Panel (Actions):

- Add to My Favorite
- Edit Report** (highlighted with a red box)
- Edit Layout** (highlighted with a red box)
- Export
- Send
- Schedule
- Jobs
- Job History
- Republish from History
- Share Report Link

Top Bar:

- Home
- Catalog
- New ▾
- Open ▾
- Signed In As: weblogic

Toolbar:

- Insert
- Page Layout
- Page Elements
- Page Break
- Page Number
- Total Pages

Data Source:

- ROWSET
- Employees
 - Full Name
 - First Name
 - Last Name
 - Monthly Salary
 - Annual Salary
 - Federal Tax Withheld
 - Title
 - Department
 - Manager

Components:

- Layout Grid
- Data Table
- Chart
- Pivot Table
- List
- Repeating Section
- Text Item
- Gauge
- Image

Report Preview:

The preview shows the title "My Salary Report" at the top. Below it is a chart with two bars: one dark blue bar reaching approximately 1,800K and one orange-red bar reaching approximately 3,600K. The Y-axis ranges from 500K to 4,000K.

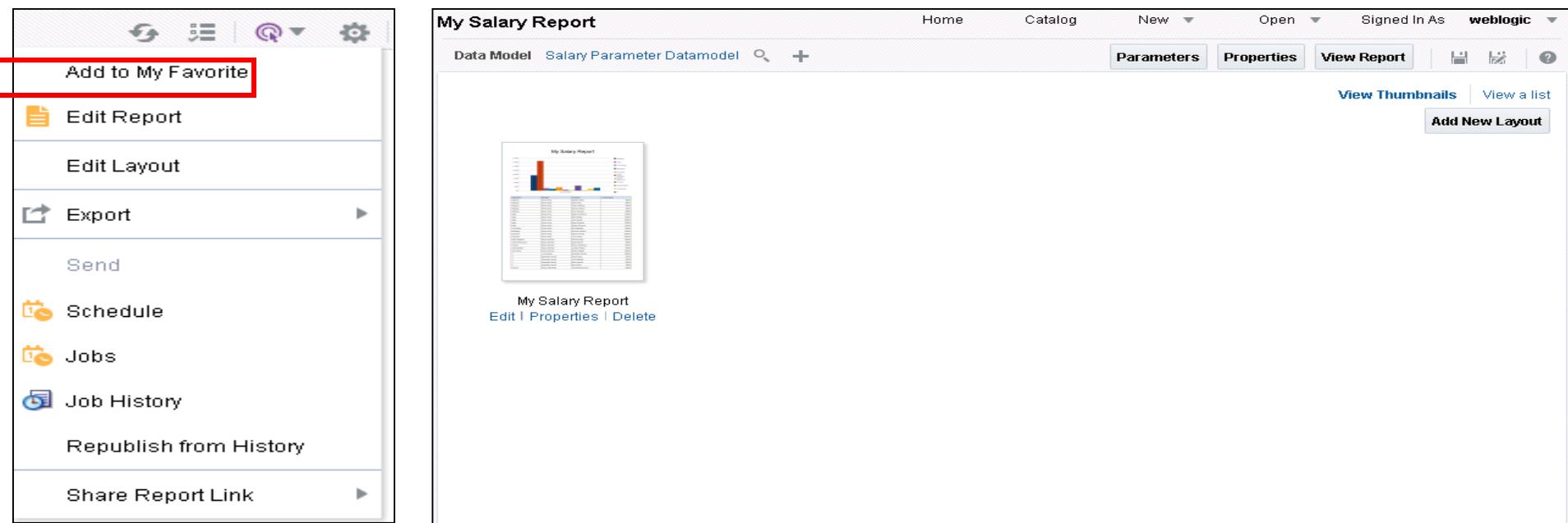
Bottom Panel (Components):

- SI
- Se
- Pu
- Mi
- Ex
- Pl
- Re
- Hu
- Re
- Fi
- A

Configuring Layout and Report Properties

You use the Report Editor to:

- Add layouts
- Configure layouts
- Configure the report properties
- Configure the parameters for this report
- Update the data model associated with the report



Configuring Layouts

The screenshot shows the Oracle BI Publisher interface for configuring a report named "My Salary Report".

Top Navigation Bar: Home, Catalog, New, Open, Signed In As weblogic, Parameters, Properties, View Report, View Thumbnails, Add New Layout, View a list.

Report Preview: A thumbnail image of the report showing a bar chart and a grid of data.

Bottom Section: Layout configuration.

Layout Table Headers:

Name	Template File	Type	Output Formats	Default Format	Default Layout	Apply Style Template	Active	View Online	Locale	Reorder
------	---------------	------	----------------	----------------	----------------	----------------------	--------	-------------	--------	---------

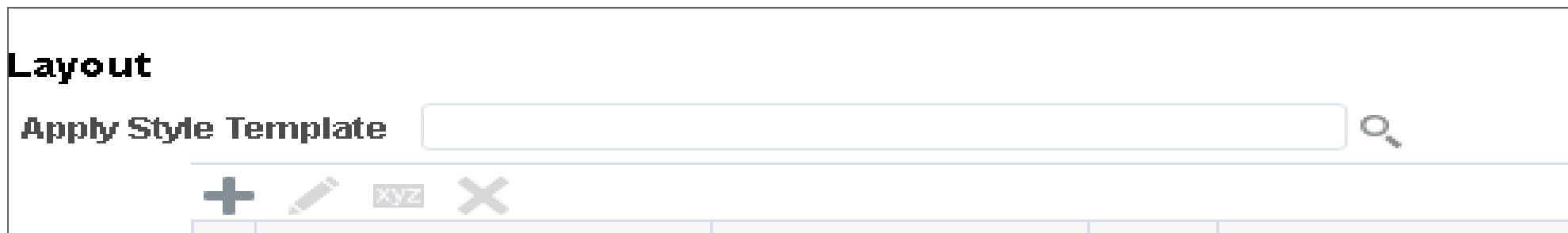
Layout Table Data:

My Salary Report	My Salary Report.xpt	xpt	Interactive;HTML;PI	Interactive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	English (United States)	
------------------	----------------------	-----	---------------------	-------------	-------------------------------------	--------------------------	-------------------------------------	-------------------------------------	-------------------------	--

Configuring Layouts: The Layout Toolbar

The Layout toolbar contains the following icons:

- **Create:** 
- **Edit:** 
- **Properties:** 
- **Delete:** 



Setting Report Properties

My Salary Report

Home Catalog New Open Signed In As weblogic

Data Model Salary Parameter Datamodel

Parameters Properties View Report

View Thumbnails View a list Add New Layout

Report Properties

General Caching Formatting Font Mapping Currency Format

Description

Run Report Online
 Show Controls
 Allow Sharing Report Links
 Open Links in New Window
 Auto Run

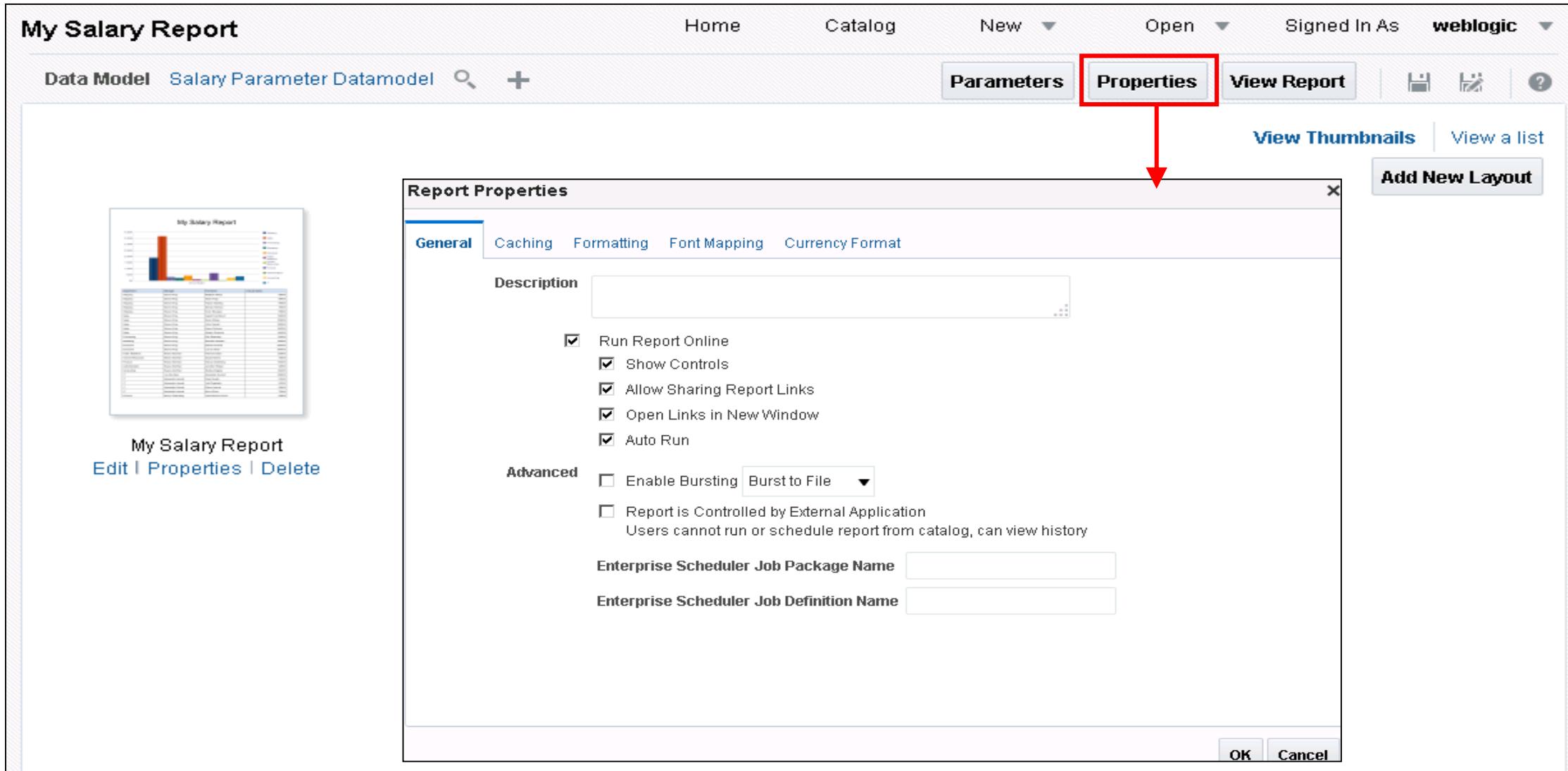
Advanced Enable Bursting

Report is Controlled by External Application
Users cannot run or schedule report from catalog, can view history

Enterprise Scheduler Job Package Name

Enterprise Scheduler Job Definition Name

OK Cancel



Setting Report Properties: General

Report Properties X

General [Caching](#) [Formatting](#) [Font Mapping](#) [Currency Format](#)

Description

Run Report Online
 Show Controls
 Allow Sharing Report Links
 Open Links in New Window
 Auto Run

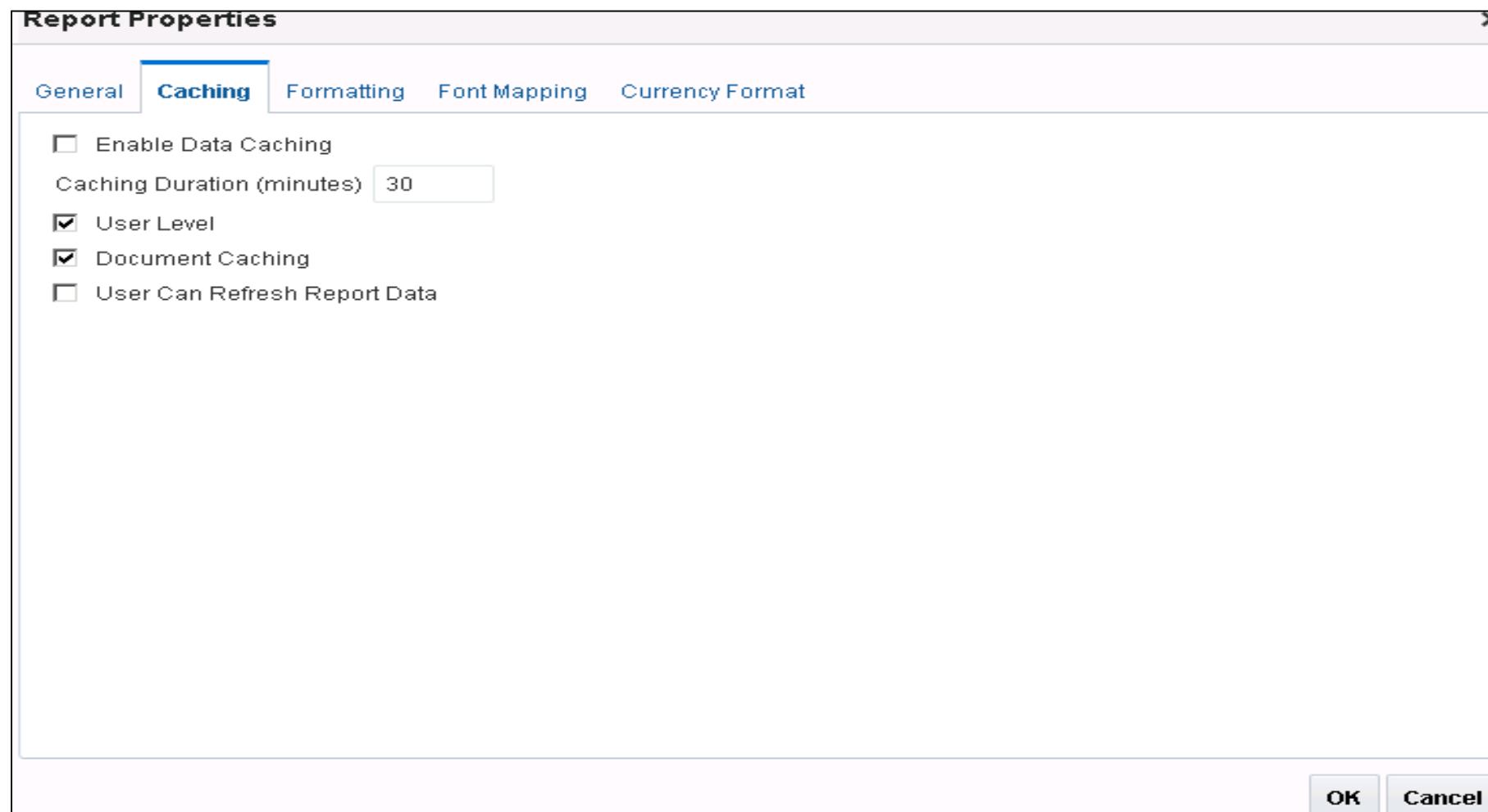
Advanced Enable Bursting ▾
 Report is Controlled by External Application
Users cannot run or schedule report from catalog, can view history

Enterprise Scheduler Job Package Name

Enterprise Scheduler Job Definition Name

OK **Cancel**

Setting Report Properties: Caching



Setting Report Properties: Formatting

Report Properties

If the Report Value is not set then the Server Value will be used.

Properties	Report Value	Server Value
PDF Output		
Compress PDF output	▼	True
Hide PDF viewer's menu bars	▼	False
Hide PDF viewer's tool bars	▼	False
Replace smart quotes	▼	True
Disable opacity and gradient shading for DVT chart	▼	False
Enable PDF Security	▼	False
Open document password	*****	
Modify permissions password		
-	

OK **Cancel**

Setting Report Properties: Font Mapping and Currency

Report Properties

Font Mapping

RTF Templates

Font Family	Style	Weight	Target Font Type	Target Font	TTC Number
Default Code 128	Normal ▾	Normal ▾	Truetype ▾	▼	
Default UPC-EAN	Normal ▾	Normal ▾	Truetype ▾	▼	
Default Micr MT	Normal ▾	Normal ▾	Truetype ▾	▼	
Default BC 3of9	Normal ▾	Normal ▾	Truetype ▾	▼	

PDF Templates

Font Family	Target Font Type	Target Font	TTC Number
No font mapping.			

OK **Cancel**

Configuring Report Parameters in the Report Editor

The screenshot shows the Oracle Reports interface with the title bar "My Salary Report". In the top navigation bar, the "Parameters" button is highlighted with a red box and a red arrow points down to the corresponding dialog box.

Parameters Dialog Box:

- Display Options:**
 - Parameter Location: Horizontal Region
 - Parameter Label Location: Place label on side
 - Show Apply Button: Default (True)
- Parameter List:**

Show	Name	Type	Multiple	Display Label	Default Value	Row Placement
<input checked="" type="checkbox"/>	dept	Menu	True	Department	Default	1
<input checked="" type="checkbox"/>	emp	Menu	True	Employee	Default	1

At the bottom right of the dialog box are "OK" and "Cancel" buttons.

Quiz: Overview

This quiz examines your knowledge of the concepts discussed in the lesson.



Quiz

The repository objects stored in the personal folder can be accessed by everyone.

- a. True
- b. False

Quiz

The catalog feature that enables you to use or transfer objects across environments is:

- a. Copy/Paste
- b. Edit/Delete
- c. Download/Upload
- d. View/Save

Quiz

Apart from a predefined data model, you can also create reports based on the data from the Excel spreadsheet, or use the Oracle BI EE subject area without having to use a data model.

- a. True
- b. False

Summary

In this lesson, you should have learned how to:

- Log in to BI Publisher
- Browse the Catalog and view Catalog objects
- Manage Catalog objects
- Manage favorites
- Create a simple report based on a predefined data model by using the Report Wizard
- View the reports
- Configure report parameters and set report properties

Practice 4: Overview

This practice covers the following topics:

- Logging in to BI Publisher
- Creating and modifying JDBC connections
- Browsing, viewing, and managing Catalog objects
- Managing favorites
- Creating a simple report based on a sample data model
- Creating a simple report based on a spreadsheet
- Creating a simple report against a BI EE subject area

5. Using Data Model Editor

Objectives

After completing this lesson, you should be able to:

- Describe the samples used for the course
- Describe the features of Data Model Editor
- Explore the supported data sources
- Create a JDBC connection to the database
- Define a private data source
- Create and edit a data model based on a SQL Query data set
- Define parameters and a list of values (LOV) for a data model
- Create reports based on this data model

Sample Lite: Introduction

The screenshot shows the Oracle BI Publisher Enterprise Catalog interface. The top navigation bar includes the Oracle logo, 'BI Publisher Enterprise', a search bar ('Search All'), and links for 'Administration', 'Help', and 'Sign Out'. The main area is titled 'Catalog' with tabs for 'Home', 'Catalog', 'New', 'Open', 'Signed In As', and 'weblogic'. Below this is a toolbar with various icons for file operations like add, upload, download, refresh, and delete. The left sidebar has sections for 'Folders' and 'Tasks'. Under 'Folders', 'Published Reporting' is expanded, showing 'Analyses', 'Data Models' (which is selected), 'JDE Samples', and 'Reports'. Under 'Tasks', there are buttons for 'Data Models' and other actions like 'Expand', 'Delete', 'Copy', 'Paste', 'Permissions', 'Properties', and 'Export XLIFF'. The right pane lists several data models:

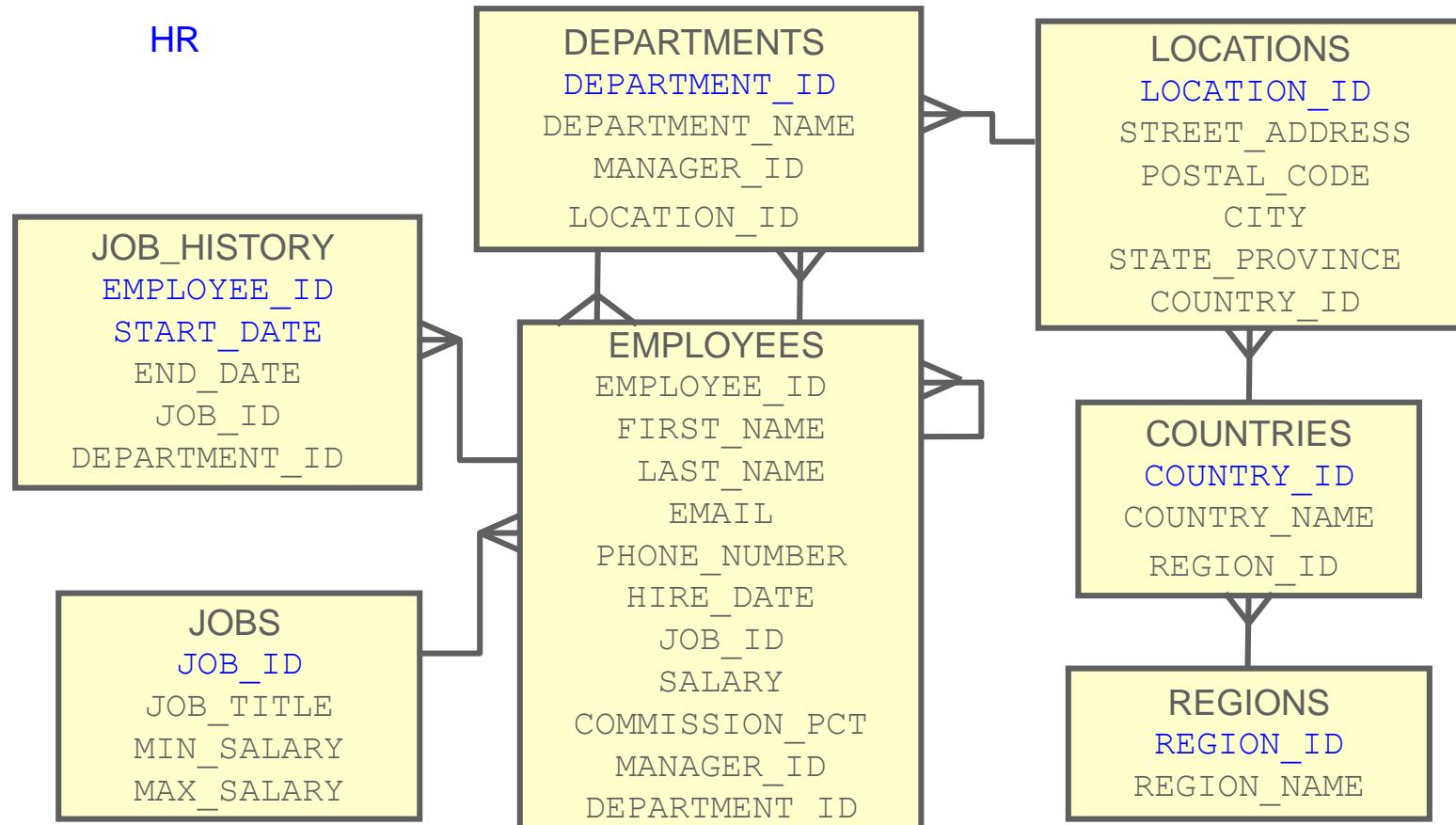
- Annual Appraisal DM** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Source: XML Data File
Edit More
- Balance Letter Datamodel** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Source Type: XML file -- Features: Pre-structured data
Edit More
- Brand Revenue Details DM** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Source Type: BI Server Sample Sales Lite subject area -- Structure: Hierarchical XML data set -- Features: Group by an element, group-level and global-level totals.
Edit More
- Company Sales - Currency Based** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Sources: Sample Sales BI Server subject area; XLS File
Edit More
- Company Sales Report DM** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Source Type: Sample Sales BI Server subject area -- Data Structure: Flat XML data set -- Features: Parameters and LOVs.
Edit More
- Customer Orders Report DM** Last Modified 4/28/16 6:52 AM Created By weblogic
Data source: Oracle database OE & HR sample schemas (requires 'demo' connection to be set up). Features: Master-detail data structure; calculated elements using expression editor, parameters with cascading LOVs.
Edit More
- Employees by Department DM** Last Modified 4/28/16 6:52 AM Created By weblogic
Data Source: Structured XML data file
Edit More

Sample Schemas: Introduction

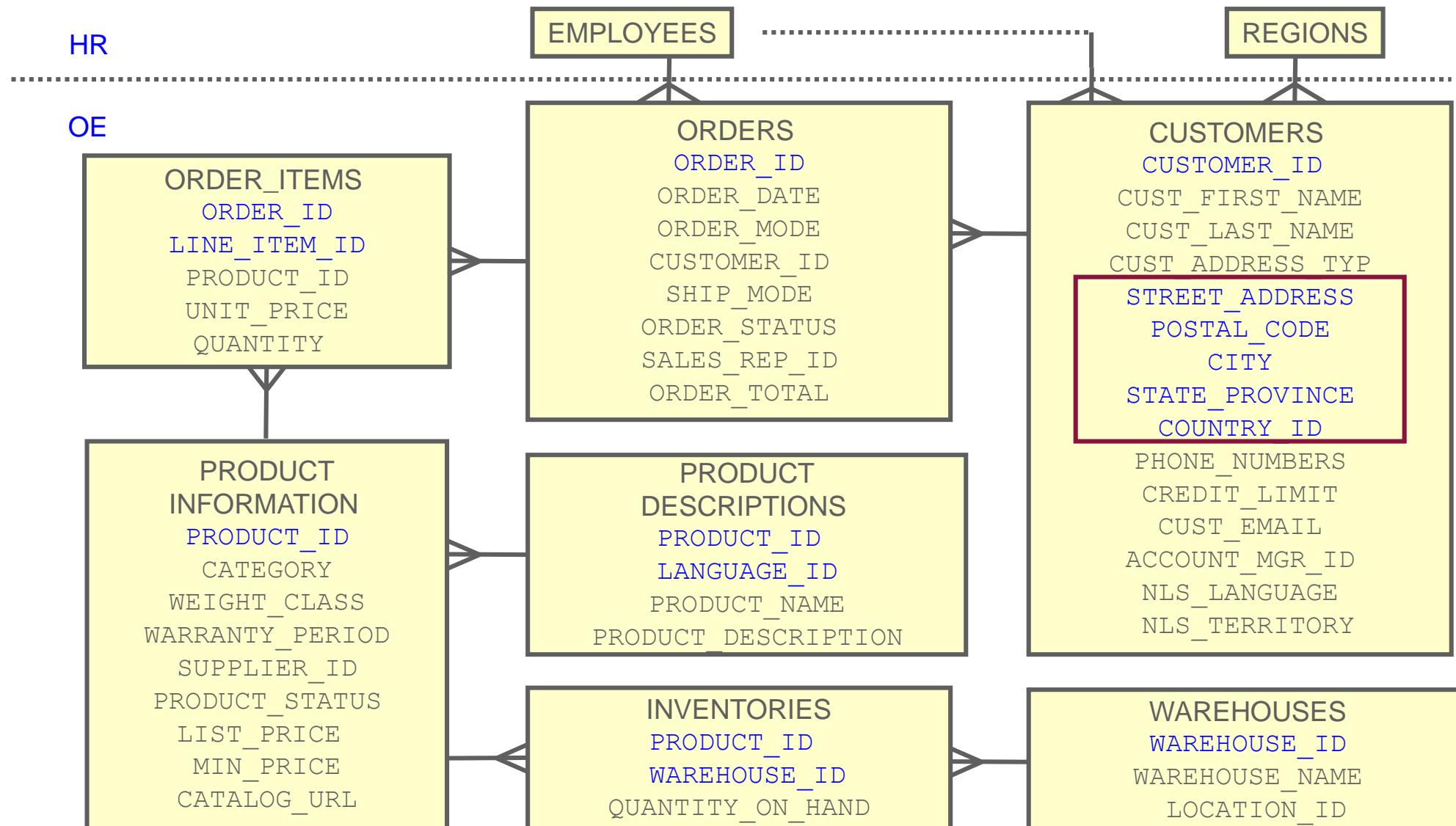
Sample schemas:

- Are provided with Oracle Database
- Provide a common platform for examples in each release of Oracle Database
- Are a set of interlinked schemas

Sample Schemas: HR Data Model



Sample Schemas: OE Data Model



Data Model Editor: Introduction

Data Model Editor enables you to:

- Manage private data sources
- Create data sets
- Query data
- Structure data
- Aggregate data
- Create calculations
- Customize data
- Create bursting definitions
- Define event triggers, parameters, and list of values

The screenshot shows the Oracle BI Publisher Enterprise Data Model Editor interface. The title bar reads "ORACLE® BI Publisher Enterprise" and the page title is "Salary Parameter Datamodel". The top navigation bar includes "Search All", "Administration", "Home", "Catalog", "New", "Open", "Manage Private Data Sources", and "View Data". On the left, a sidebar titled "Data Model" lists various components: Data Sets (employees), Event Triggers, Flexfields, List of Values (depList, empList), Parameters (dept, emp), and Bursting (Burst to File, Burst to Email). The main workspace has tabs for "Diagram", "Structure", "Data", and "Code", with "Diagram" selected. A "Global Level Functions" panel contains a placeholder "Drop here for aggregate function". To the right, a "ROW" table structure is displayed with columns for NAME, FIRST_NAME, LAST_NAME, SALARY, ANNUAL_SALARY, FED_WITHHELD, JOB_TITLE, DEPARTMENT_NAME, and MANAGER. Each column has an edit icon (A) and a settings icon (gear).

Examining Data Model Properties

Untitled

Home Catalog New Open Signed In As weblogic

Manage Private Data Sources | View Data | Create Report | ?

Data Model

Properties

Description

Default Data Source: demo

Oracle DB Default Package

Database Fetch Size

Query Time Out

Scalable Mode: Instance Level

Enable SQL Pruning: Instance Level

Enable SQL session trace: Instance Level

SQL Trace Name

Backup Data Source: Enable Backup Connection
 Switch to Backup Data Source when Primary Data Source is unavailable
 Use Backup Data Source only

XML Output Options: Include Parameter Tags
 Include Empty Tags for Null Elements
 Include Group List Tag

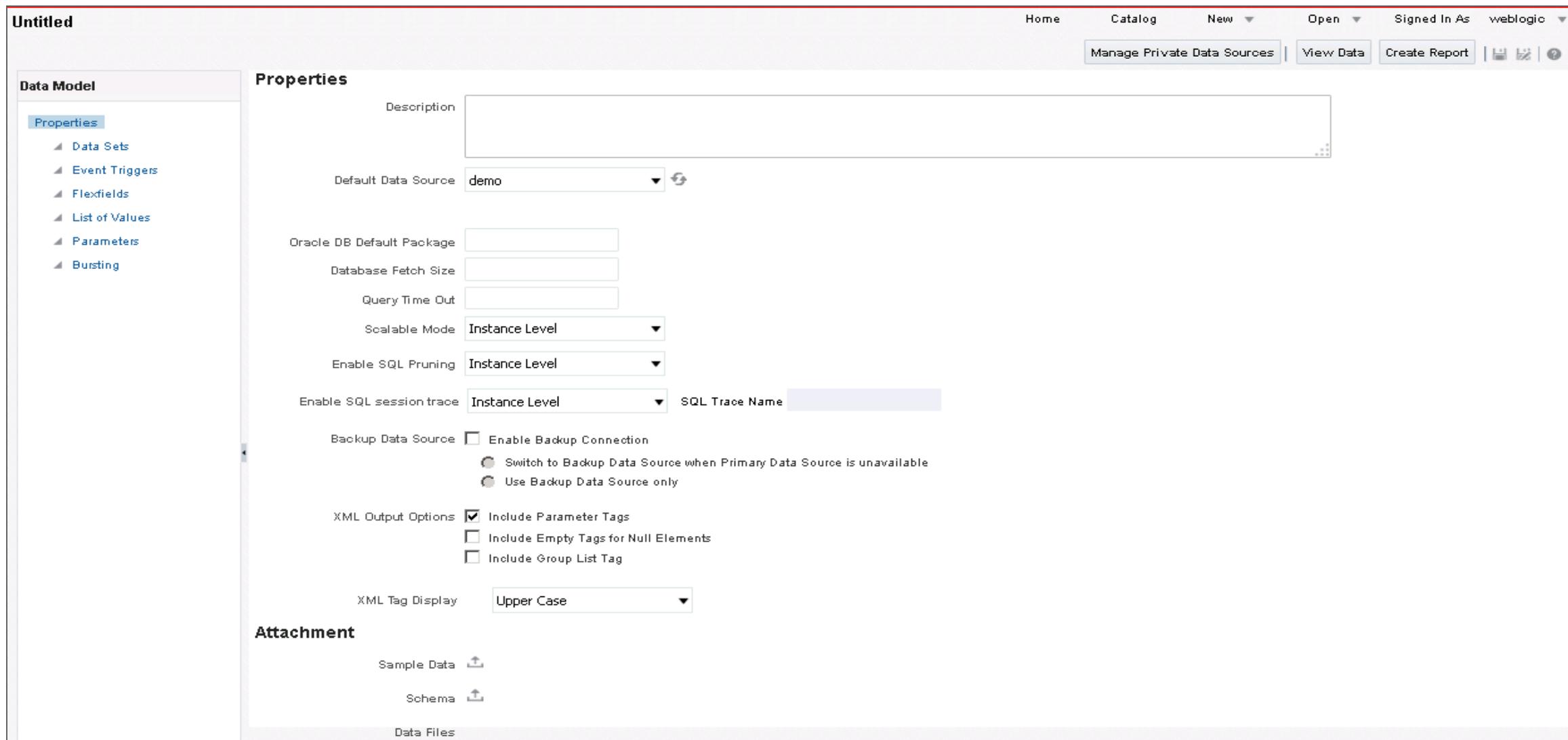
XML Tag Display: Upper Case

Attachment

Sample Data

Schema

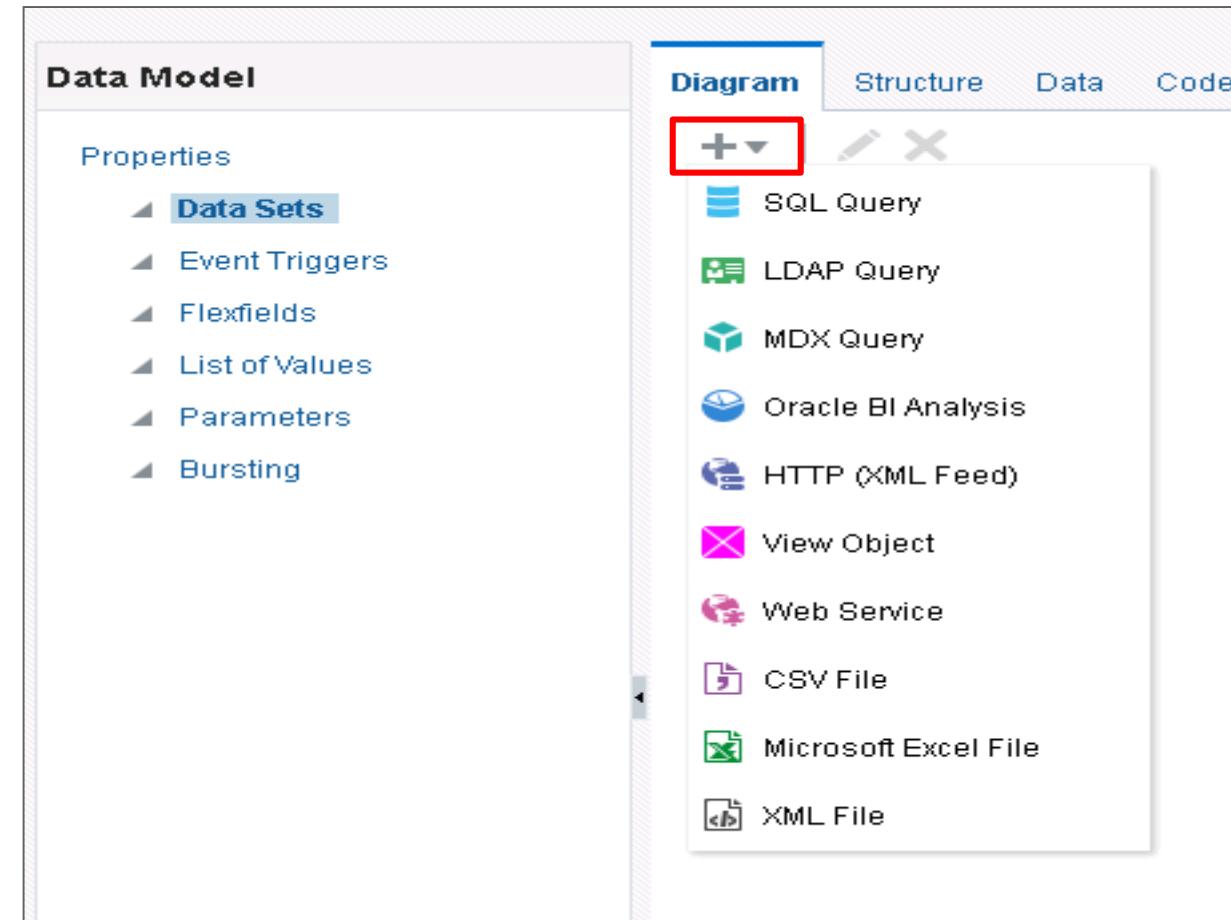
Data Files



Supported Data Sources

BI Publisher supports the following data sources:

- SQL Query
- MDX Query
- Oracle BI Analysis
- View Object
- Web Service
- LDAP Query
- XML File
- Microsoft Excel File
- CSV File
- HTTP(XML Feed)



Private Data Sources: Overview

- Benefits:
 - Reduce dependency on IT administrators
 - Reduce development time
- Best practices and data security considerations:
 - Users with administrator privileges have execute access to all private JDBC and OLAP connections that users create.
 - Store data models that make use of private connections in My Folders.
 - Do not store passwords to back-end sources that store user-sensitive data.
 - Do not save user-sensitive data in sample data.
 - If you plan to publish the data model, select **Use Proxy Authentication** (requires that back-end data source is VPD enabled) to ensure that user-sensitive data is secured.

Creating a Private Data Source

The screenshot shows the Oracle Database Modeler interface. On the left, there's a 'Data Model' panel with tabs for 'Diagram' (selected), 'Structure', 'Data', and 'Code'. Below this is a 'Properties' section with categories: 'Data Sets' (selected), 'Event Triggers', and 'Flexfields'. In the center, a modal window titled 'Manage Private Data Sources' is open. At the top of this window is a toolbar with buttons for 'Home', 'Catalog', 'New', 'Open', and 'Signed In As'. To the right of these are 'Manage Private Data Sources' (highlighted with a red box), 'View Data', and 'Create Report'. The main area of the modal is titled 'Data Sources' and contains a tab bar with 'JDBC' (selected), 'JNDI', 'File', 'LDAP', 'OLAP', 'Web Services', and 'HTTP'. Below the tab bar is a button labeled 'Add Data Source' (highlighted with a red box). A table lists existing data sources:

Data Source Name	Connection String	Delete
demo	jdbc:oracle:thin:@localhost:1521:orcl	X
Oracle BI EE	jdbc:oraclebi://EDVMR1PO:9514/	X

At the bottom right of the modal is a 'Close' button.

Creating a Private Data Source

Manage Private Data Sources

Add Data Source

General

TIP Please make sure to install the required JDBC driver classes.
TIP With Oracle Fusion Middleware Security Model, select the Use System User checkbox to use the BI System User for your BI Server Database Connection.

* **Data Source Name** MYJDBC

* **Driver Type** Oracle 12c

* **Database Driver Class** oracle.jdbc.OracleDriver
(Example: oracle.jdbc.OracleDriver)

* **Connection String** `jdbc:oracle:thin:@localhost:1521:ordl`

Use System User

* **Username** oe

Password **

Pre Process Function

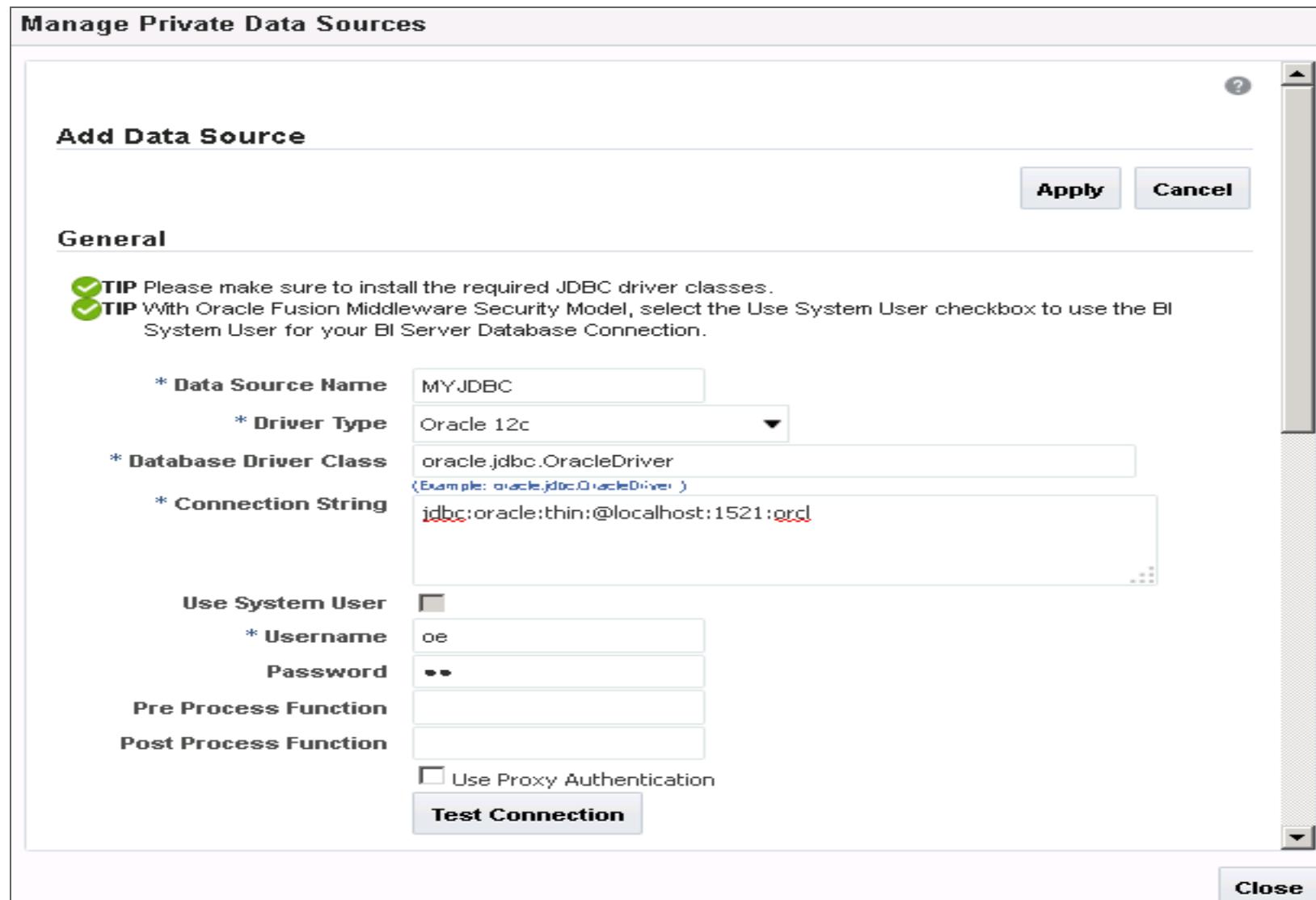
Post Process Function

Use Proxy Authentication

Test Connection

Apply **Cancel**

Close



Creating a Private Data Source

The screenshot shows the Oracle Database Properties dialog for a Data Model named "Untitled". The left sidebar lists properties like Data Sets, Event Triggers, Flexfields, and List of Values. The main panel shows the "Properties" tab with fields for Description (empty), Default Data Source (set to "MYJDBC"), and Oracle DB Default Package (empty). A purple callout box points to the "Default Data Source" dropdown with the text "Select the Private Data Source".

Untitled

Home

Data Model

Properties

Description

Default Data Source: MYJDBC

Oracle DB Default Package

Select the Private Data Source

Creating a Simple Data Model Based on a SQL Query Data Set

1. Define the default data source and output options. (Optional)
2. Add a SQL query data set.
3. Build a query in Query Builder.
4. Save the data model.
5. View and save sample data.

Step1: Defining Default Data Source and Output Options

The screenshot shows the Oracle BI Publisher interface. On the left, there is a Catalog pane with various items listed: Folder, Report, Report Job, Data Model (highlighted with a red circle labeled 1), Style Template, and Sub Template. In the center, there is a Data Model pane titled "Properties" which lists categories like Data Sets, Event Triggers, Flexfields, List of Values, Parameters, and Bursting. To the right, the main "Properties" pane is displayed, containing settings for a data model. The "Default Data Source" dropdown menu is open, showing four options: MYJDBC (selected), demo, MYJDBC, and Oracle BI EE. A red circle labeled 2 highlights the dropdown menu. Another red circle labeled 3 highlights the "Include Parameter Tags" checkbox under the "XML Output Options" section. The "Attachment" section at the bottom includes links for Sample Data, Schema, and Data Files.

Catalog

- Folder
- Report
- Report Job
- Data Model **1**
- Style Template
- Sub Template

Data Model

Properties

- Data Sets
- Event Triggers
- Flexfields
- List of Values
- Parameters
- Bursting

Properties

Description: [empty]

Default Data Source: MYJDBC **2**
demo
MYJDBC
Oracle BI EE

Oracle DB Default Package: [empty]

Database Fetch Size: [empty]

Query Time Out: [empty]

Scalable Mode: Instance Level

Enable SQL Pruning: Instance Level

Enable SQL session trace: Instance Level **3** SQL Trace Name: [empty]

Backup Data Source: Enable Backup Connection
 Switch to Backup Data Source when Primary Data Source is unavailable
 Use Backup Data Source only

XML Output Options: Include Parameter Tags
 Include Empty Tags for Null Elements
 Include Group List Tag

XML Tag Display: Upper Case

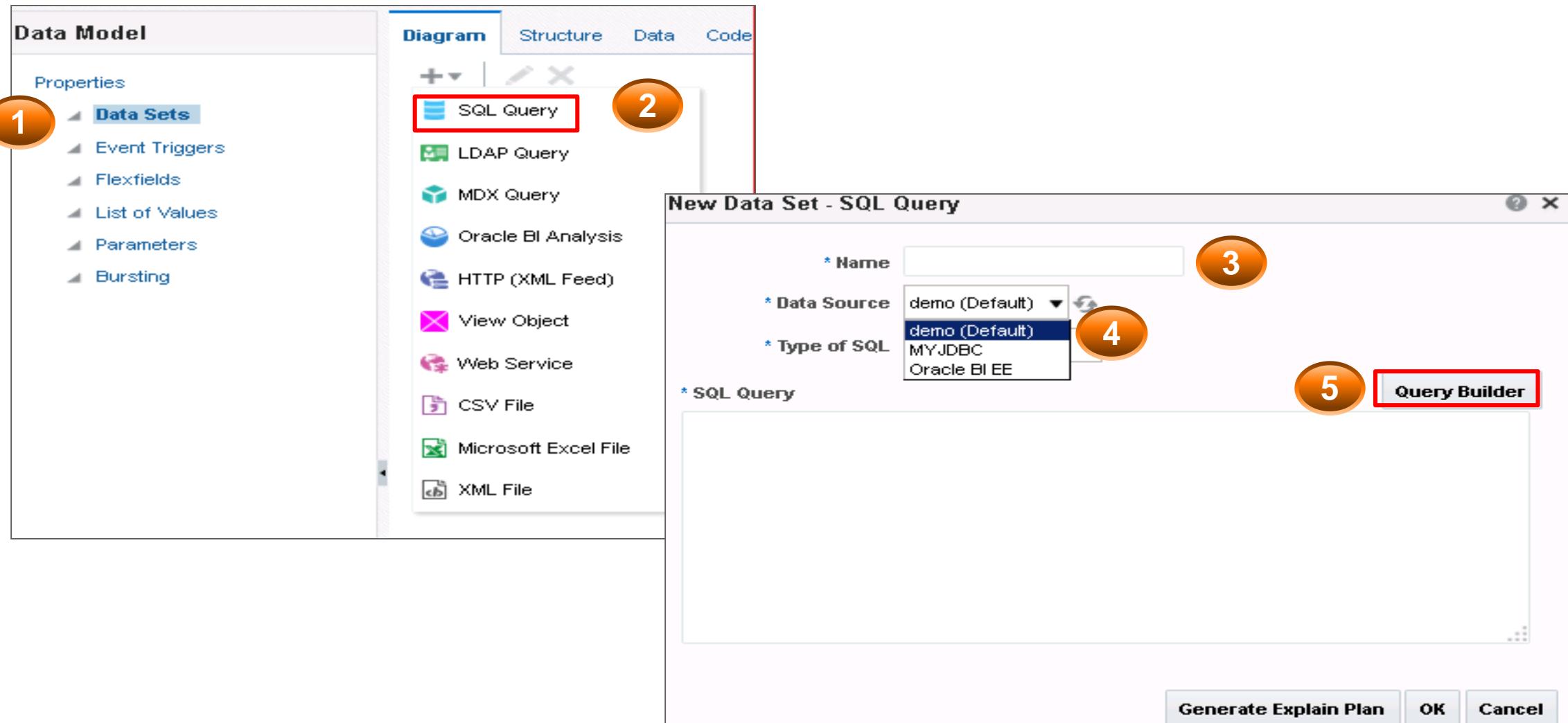
Attachment

Sample Data **↑**

Schema **↑**

Data Files

Step 2: Adding a SQL Query Data Set



Step 3: Building a Query in Query Builder

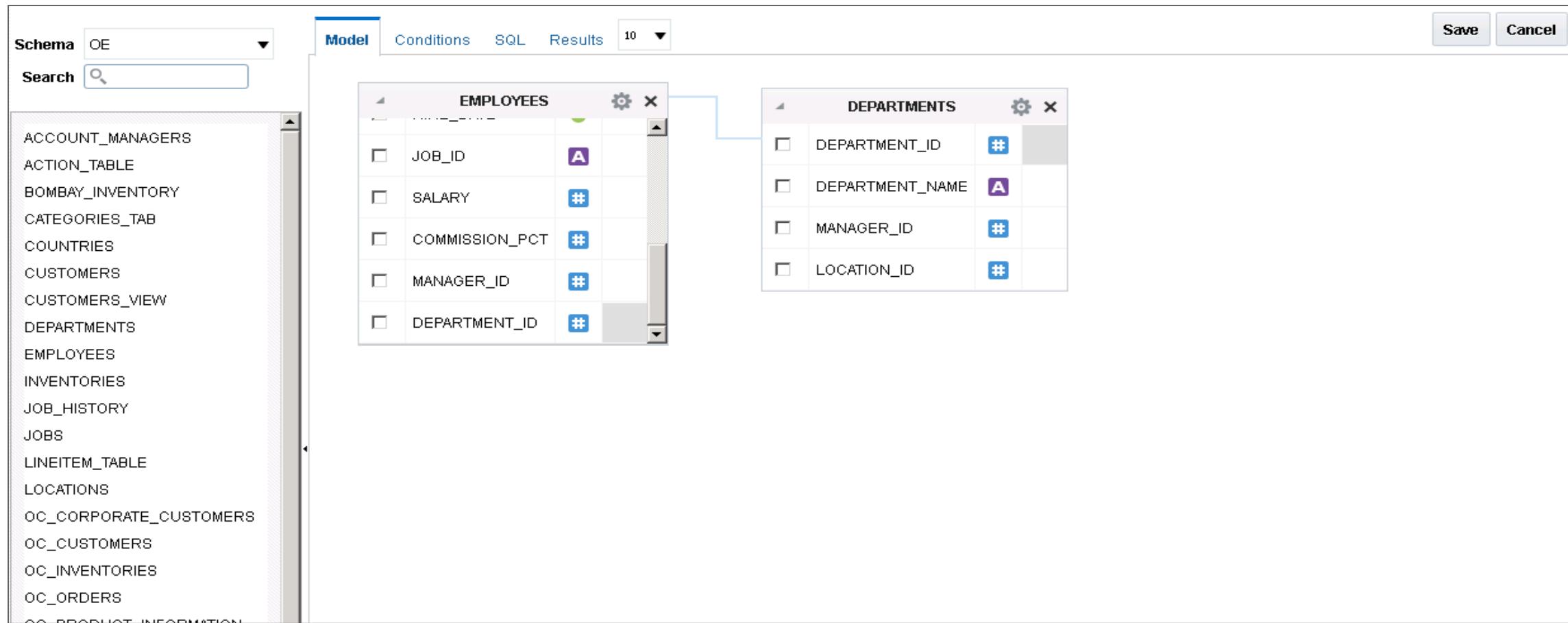
The screenshot shows the Oracle SQL Developer Query Builder interface. The top navigation bar includes tabs for Model, Conditions, SQL, and Results, with the Model tab currently selected. A dropdown menu for Schema is set to OE, and there is a search bar. On the right side, there are Save and Cancel buttons. The main area displays a list of tables from the OE schema:

- ACCOUNT_MANAGERS
- ACTION_TABLE
- BOMBAY_INVENTORY
- CATEGORIES_TAB
- COUNTRIES
- CUSTOMERS
- CUSTOMERS_VIEW
- DEPARTMENTS
- EMPLOYEES
- INVENTORIES
- JOB_HISTORY
- JOBs
- LINEITEM_TABLE
- LOCATIONS
- OC CORPORATE CUSTOMERS
- OC_CUSTOMERS
- OC_INVENTORIES
- OC_ORDERS

Step 3: Building a Query in Query Builder: Select Objects

The screenshot shows the Oracle SQL Developer Query Builder interface. The 'Schema' dropdown is set to 'OE'. The 'Model' tab is selected, displaying two tables: 'EMPLOYEES' and 'DEPARTMENTS'. The 'EMPLOYEES' table has columns: JOB_ID, SALARY, COMMISSION_PCT, MANAGER_ID, and DEPARTMENT_ID. The 'DEPARTMENTS' table has columns: DEPARTMENT_ID, DEPARTMENT_NAME, MANAGER_ID, and LOCATION_ID. Both tables have a gear icon and an 'X' icon in their header bars. On the left, a sidebar lists various database objects: ACCOUNT_MANAGERS, ACTION_TABLE, BOMBAY_INVENTORY, CATEGORIES_TAB, COUNTRIES, CUSTOMERS, CUSTOMERS_VIEW, DEPARTMENTS, EMPLOYEES, INVENTORIES, JOB_HISTORY, JOBS, LINEITEM_TABLE, LOCATIONS, OC CORPORATE_CUSTOMERS, OC_CUSTOMERS, OC_INVENTORIES, and OC_ORDERS. A search bar is also present in the sidebar.

Step 3: Building a Query in Query Builder: Define Relations



Step 3: Building a Query in Query Builder: Select Columns

The screenshot shows the Oracle SQL Developer Query Builder interface. The 'Model' tab is selected. On the left, a list of tables in the 'OE' schema is shown. In the center, two tables are displayed: 'EMPLOYEES' and 'DEPARTMENTS'. The 'EMPLOYEES' table has columns: EMPLOYEE_ID, FIRST_NAME (with a checked checkbox), and LAST_NAME. The 'DEPARTMENTS' table has columns: DEPARTMENT_ID, DEPARTMENT_NAME (with a checked checkbox), MANAGER_ID, and LOCATION_ID. A blue line connects the 'FIRST_NAME' and 'DEPARTMENT_NAME' columns. A purple callout box with the text 'Select the columns to be place in the query' is positioned over the 'FIRST_NAME' column in the 'EMPLOYEES' table. The top right of the window has 'Save' and 'Cancel' buttons.

Schema: OE

Search:

Model Conditions SQL Results 10 ▾

Save Cancel

EMPLOYEES

	EMPLOYEE_ID	#
<input checked="" type="checkbox"/>	FIRST_NAME	A
	LAST_NAME	A

DEPARTMENTS

	DEPARTMENT_ID	#
<input checked="" type="checkbox"/>	DEPARTMENT_NAME	A
	MANAGER_ID	#
	LOCATION_ID	#

ACCOUNT_MANAGERS
ACTION_TABLE
BOMBAY_INVENTORY
CATEGORIES_TAB
COUNTRIES
CUSTOMERS
CUSTOMERS_VIEW
DEPARTMENTS
EMPLOYEES
INVENTORIES
JOB_HISTORY
JOBS
LINEITEM_TABLE
LOCATIONS
OC CORPORATE_CUSTOMERS
OC_CUSTOMERS
OC_INVENTORIES
OC_ORDERS

Select the columns to be place in the query

Step 3: Building a Query in Query Builder: Add Aliases and Conditions

Schema **OE** ▾ Model Conditions SQL Results 10 ▾ Save Cancel

Search

Column	Alias	Object	Condition	Sort Type	Sort Order	Show	Function	Group By	Delete
DEPARTMENT_NAME	DEPARTMENT_NAME	DEPARTMENTS		ASC ▾		<input checked="" type="checkbox"/>		<input type="checkbox"/>	X
SALARY	SALARY	EMPLOYEES		ASC ▾		<input checked="" type="checkbox"/>		<input type="checkbox"/>	X
MANAGER_ID	MANAGER_ID	EMPLOYEES		ASC ▾		<input checked="" type="checkbox"/>		<input type="checkbox"/>	X
JOB_ID	JOB_ID	EMPLOYEES		ASC ▾		<input checked="" type="checkbox"/>		<input type="checkbox"/>	X
FIRST_NAME	FIRST_NAME	EMPLOYEES		ASC ▾		<input checked="" type="checkbox"/>		<input type="checkbox"/>	X
LAST_NAME	LAST_NAME	EMPLOYEES		ASC ▾		<input checked="" type="checkbox"/>		<input type="checkbox"/>	X

ACCOUNT_MANAGERS
ACTION_TABLE
BOMBAY_INVENTORY
CATEGORIES_TAB
COUNTRIES
CUSTOMERS
CUSTOMERS_VIEW
DEPARTMENTS
EMPLOYEES
INVENTORIES
JOB_HISTORY
JOBS

Alias Display Name for columns

This condition is used to automatically add parameters while creating the data set

Step 3: Building a Query in Query Builder: View Results and Save Query

The screenshot shows the Oracle SQL Developer interface during the process of building a query. A modal window titled "Edit Data Set - Employees" is open in the center. The "Results" tab is selected in the top navigation bar, indicated by a red box and a large orange circle labeled "1". In the main pane, a table of employee data is displayed:

DEPARTMENT_ID	SALARY	MANAGER_ID	JOB_ID	FIRST_NAME	LAST_NAME
Administration	10000	101	AD_ASST	Jennifer	Whalen
Marketing	13000	100	MK_MAN	Michael	Hartstein
Marketing	6000	201	MK_REP	Pat	Fay
Purchasing	11000	100	PU_MAN	Den	Raphaely
Purchasing	3100	114	PU_CLERK	Alex	Cafferata
Purchasing	2900	114	PU_CLERK	She	King
Purchasing	2800	114	PU_CLERK	Sig	Buchanan
Purchasing	2600	114	PU_CLERK	Guy	Leverett
Purchasing	2500	114	PU_CLERK	Kare	Colmenar
Human Resources	6500	101	HR REP	Susan	Murphy

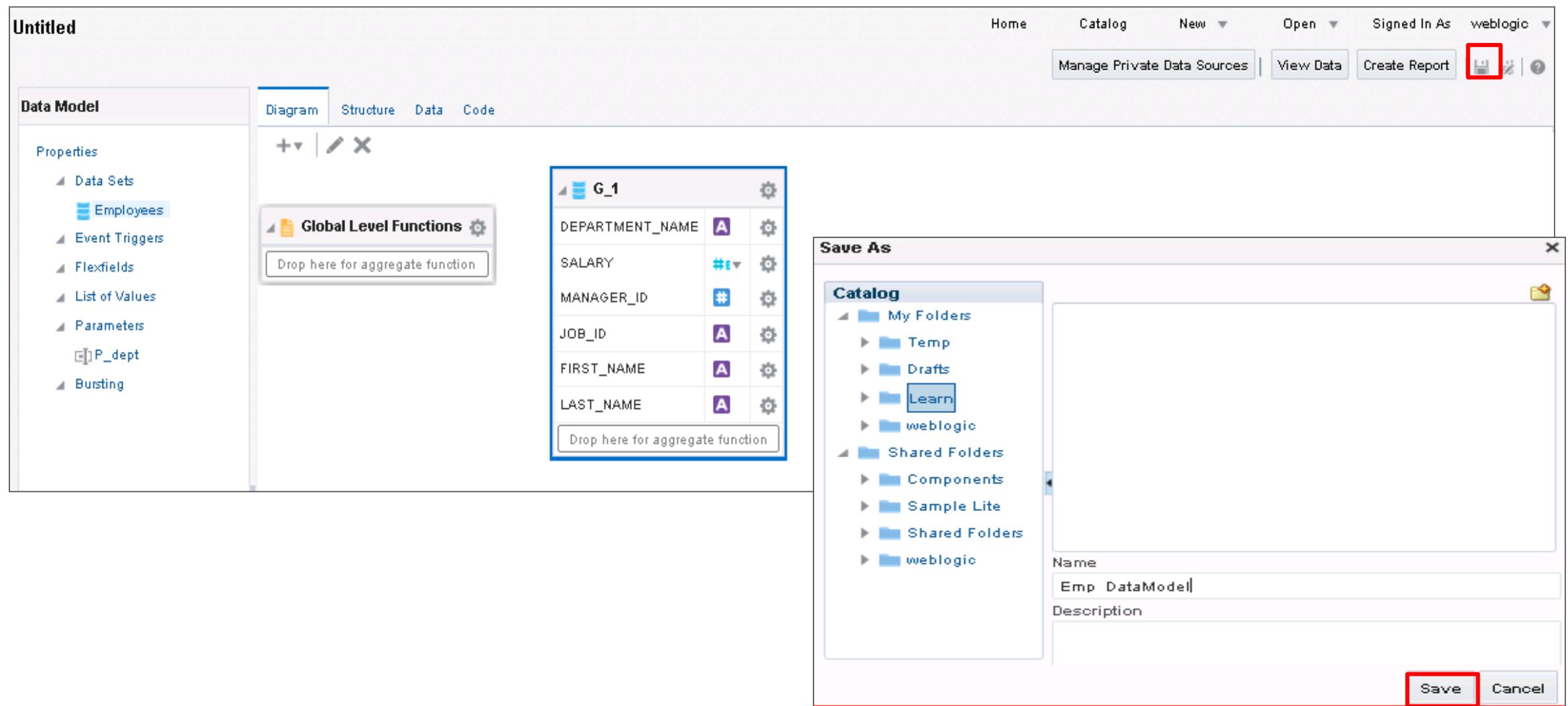
To the right of the results, there are "Save" and "Cancel" buttons, with "Save" highlighted by a red box and a large orange circle labeled "2".

Below the results, a modal window titled "Add Parameter - Employees" is open. It contains a message: "Please select one or more bind variables to create corresponding parameters" and a checkbox labeled "P_dept" which is checked. This window has its own "OK" and "Cancel" buttons at the bottom, with "OK" highlighted by a red box and a large orange circle labeled "4".

The "Edit Data Set - Employees" window also has "Query Builder" and "Generate Explain Plan" buttons at the bottom right.

On the left side of the interface, a sidebar lists various database objects: ACCOUNT_MANAGER, ACTION_TABLE, BOMBAY_INVENTORY, CATEGORIES_TAB, COUNTRIES, CUSTOMERS, CUSTOMERS_VIEW, DEPARTMENTS, EMPLOYEES, INVENTORIES, and JOBS.

Step 4: Saving the Data Model



Step 5: Viewing Output and Saving Sample Data

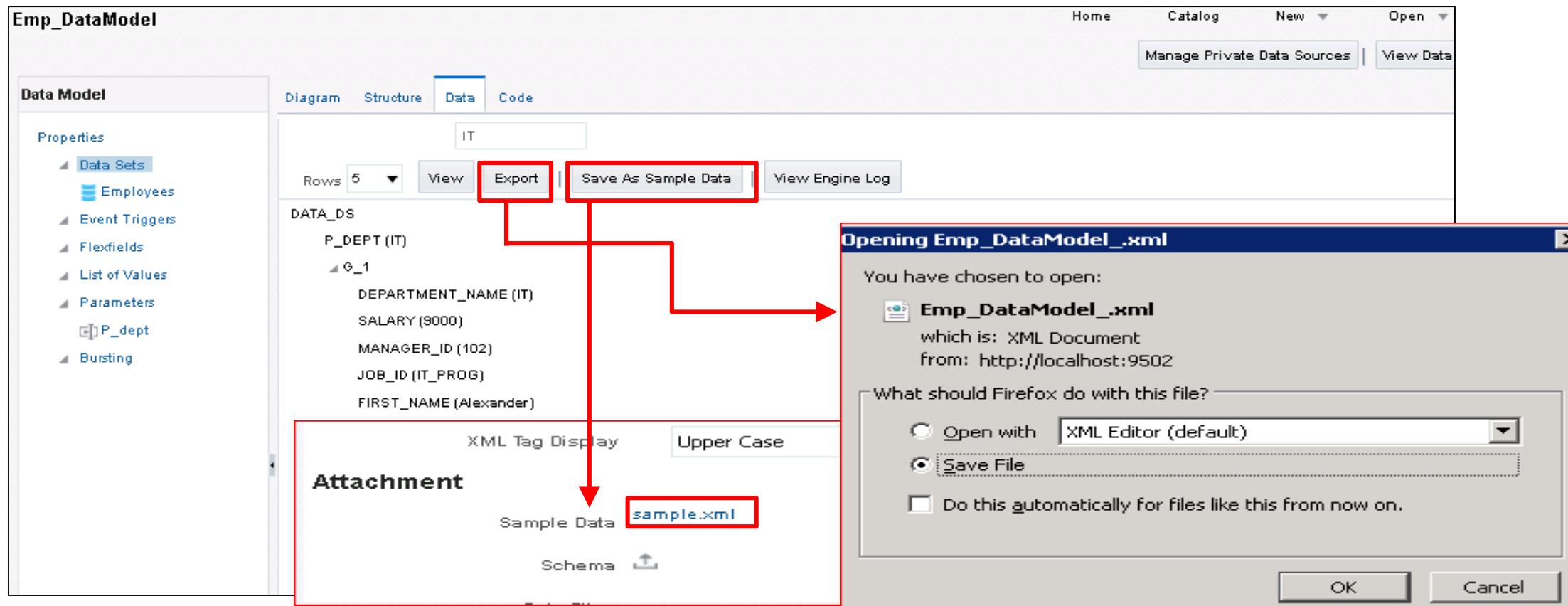
The screenshot shows the Oracle Database Data Modeler interface for a project named "Emp_DataModel".

- Step 1:** The "View Data" button in the top right corner is highlighted with a red box and a circled number 1.
- Step 2:** The "Data" tab in the top navigation bar is highlighted with a red box and a circled number 2.
- Step 3:** The "Employees" data set in the left sidebar is highlighted with a red box and a circled number 3.
- Step 4:** The "Save As Sample Data" button in the toolbar is highlighted with a red box and a circled number 4.

The main workspace displays the structure of the "DATA_DS" data source, which includes the "P_dept" fact and two "G_1" dimensions. The "G_1" dimension contains records for Alexander Hunold and Bruce.

Dimension	Attribute	Value
G_1 (Department)	DEPARTMENT_NAME	IT
	SALARY	9000
	MANAGER_ID	102
	JOB_ID	IT_PROG
	FIRST_NAME	Alexander
G_1 (Employee)	DEPARTMENT_NAME	IT
	SALARY	6000
	MANAGER_ID	103
	JOB_ID	IT_PROG
	FIRST_NAME	Bruce

Step 5: Saving Sample Data and Exporting



Creating a Report from Data Model Editor

The screenshot shows the Oracle Data Modeler interface with the following components:

- Left Panel (Data Model):** Shows the properties of the "Employees" data set, which is highlighted with a red box.
- Middle Panel (Diagram View):** Displays a global level function named "G_1" with five columns: DEPARTMENT_NAME, SALARY, MANAGER_ID, JOB_ID, and FIRST_NAME. Each column has a gear icon for configuration.
- Top Bar:** Includes links for Home, Catalog, New, Open, and Signed In As, along with buttons for Manage Private Data Sources, View Data, and Create Report.
- Create Report Dialog:** A modal window titled "Create Report" with the following steps:
 - Step 1: Select Data (highlighted with a red arrow pointing from the top bar).
 - Step 2: Select Layout
 - Step 3: Create Chart
 - Step 4: Create 2nd Chart
 - Step 5: Create Table
 - Step 6: Save Report- Buttons in the dialog:** Use Data Model (highlighted with a red box), Upload Spreadsheet, and Use Subject Area.
- Text in the dialog:** "Create a report using an existing Data Model" and a search bar containing "Data Model /~weblogic/Learn/Emp_DataMode".
- Bottom of the dialog:** "How do you want to create your report?" with options "Guide Me" (radio button selected) and "Use Report Editor".
- Bottom Right:** Navigation buttons: Previous, Next, Cancel, and Finish.

Describing Parameters and LOVs

Emp_Report

Department All

All
Administration
Marketing
Purchasing
Human Resources
Shipping
IT
Public Relations
Search ... F12

Apply

Home Catalog New ▾

Emp_Report

A bar chart titled "Emp_Report" showing salary distribution by department. The Y-axis represents salary from 0K to 350K. The X-axis represents departments. The bars are color-coded according to the legend. The highest salary is for the Purchasing department at approximately 300K.

Department	Salary
Administration	4400
Marketing	13000
Purchasing	150000
Human Resources	2500
Shipping	300000
IT	6000
Public Relations	2900
Sales	2800
Executive	2600
Finance	3100
Accounting	2500

DEPARTMENT_NAME JOB_ID LAST_NAME SALARY

DEPARTMENT_NAME	JOB_ID	LAST_NAME	SALARY
Administration	AD_ASST	Whalen	4400
Marketing	MK_MAN	Hartstein	13000
Marketing	MK_REP	Fay	6000
Purchasing	PU_MAN	Raphaely	11000
Purchasing	PU_CLERK	Khoo	3100
Purchasing	PU_CLERK	Baida	2900
Purchasing	PU_CLERK	Tobias	2800
Purchasing	PU_CLERK	Himuro	2600
Purchasing	PU_CLERK	Colmenares	2500
Human Resources	HR_REP	Morris	6500

Adding Parameters

The screenshot shows the Oracle APEX 'Parameters' configuration screen. On the left, the 'Data Model' sidebar lists various components, with 'P_dept' selected and highlighted by a purple box. A callout bubble labeled '1' points to this selection.

The main area is titled 'Parameters' and contains a table with columns: Name, Data Type, Default Value, Parameter Type, Row Placement, and Reorder. A row for 'P_dept' is selected, highlighted with a red border. A callout bubble labeled '2' points to the 'Parameter Type' dropdown menu, which is open and shows options: Menu, Text, Menu (selected), and Date.

Below the table, a detailed configuration panel is shown for 'P_dept'. It includes fields for Display Label ('Department'), List of Values ('Dept_LOV'), Number of Values to Display in List ('100'), and Options. Under Options, there is a checkbox for 'Multiple Selection' (unchecked) and another checked checkbox for 'Can select all'. There are two radio buttons: 'NULL Value Passed' (unchecked) and 'All Values Passed' (checked). A callout bubble labeled '4' points to the 'All Values Passed' radio button.

Adding LOVs: SQL Query Type

The screenshot illustrates the process of creating a List of Values (LOV) of department names using an SQL query. The interface is divided into two main sections: the Data Model on the left and the List of Values configuration on the right.

- Create a List of Values**: A callout box points to the "List of Values" item in the Data Model sidebar.
- Add New LOV**: Clicking the "+" button in the List of Values header creates a new entry named "Dept LOV".
- Configure LOV**: The "Type" is set to "SQL Query", and the "Data Source" is "demo".
- SQL Query Definition**: The SQL query is defined as:

```
select "DEPARTMENTS"."DEPARTMENT_NAME" as "DEPARTMENT_NAME"  
from "OE"."DEPARTMENTS" "DEPARTMENTS"
```
- Query Builder**: The "Query Builder" button is used to generate the SQL query. The generated query is highlighted with a red box.

The interface also includes a schema dropdown set to "OE", a search bar, and a model panel on the right showing the "DEPARTMENTS" table with columns: LOCATION_ID, MANAGER_ID, DEPARTMENT_NAME, and DEPARTMENT_ID. The "DEPARTMENT_NAME" column is checked as a key column.

Additional Examples of Parameters

Data Model

Properties

- Data Sets
 - Employees
- Event Triggers
- Flexfields
- List of Values
 - Dept_LOV
- Parameters
 - P_dept
- Bursting

Parameters

Name	Data Type	Default Value	Parameter Type	Row Placement	Reqd
P_dept	String		Menu	1	

P_dept: Type: Menu

Display Label: Department

List of Values: Dept_LOV

Number of Values to Display in List: 100

Options:

- Multiple Selection
- Can select all
- NULL Value Passed
- Refresh other parameters

Emp_Report

Parameter Type = Menu

Emp_Report

Department All

Apply

A bar chart titled "Emp_Report" showing salary distribution. The Y-axis represents salary in thousands, ranging from 0K to 300K. The X-axis represents departments. The bars are color-coded according to a legend on the right. The legend includes: Administration (dark blue), Marketing (orange-red), Purchasing (purple), Human Resources (teal), Shipping (yellow-orange), IT (pink), Public Relations (light green), Sales (dark purple), Executive (green), Finance (yellow), and Accounting (blue). The chart shows that the highest salaries are in the Sales department, followed by Marketing and Purchasing.

DEPARTMENT_NAME	JOB_ID	LAST_NAME	SALARY
Administration	AD_ASST	Whalen	4400
Marketing	MK_MAN	Hartstein	13000
Marketing	MK_REP	Fay	6000
Purchasing	PU_MAN	Raphaely	11000
Purchasing	PU_CLERK	Khoo	3100

Additional Examples of Parameters

The screenshot shows the Oracle APEX application builder interface with two separate parameter definitions.

Parameter P_hiredate:

- Name:** P_hiredate
- Data Type:** Date
- Default Value:** 01-01-2010
- Parameter Type:** Date
- Row Placement:** 1

Parameter P_Salary:

- Name:** P_Salary
- Data Type:** Integer
- Default Value:** (empty)
- Parameter Type:** Text
- Row Placement:** 1

A callout box with a purple border and arrow points from the "Data Type = Integer" label to the "P_Salary" parameter definition.

A second callout box with a purple border and arrow points from the "Data Picker is Restricted to the year 2010" label to the "P_hiredate" parameter definition.

Data Model Properties:

- Data Sets: Employees
- Event Triggers
- Flexfields
- List of Values: Dept_LOV
- Parameters: P_hiredate (selected), P_Salary
- Bursting

Parameter P_hiredate Properties:

- Display Label: Enter a Date
- Text Field Size: (empty)
- Date Format String: MM-dd-yyyy
- Date From: 01-01-2010
- Date To: 12-31-2010

Parameter P_Salary Properties:

- Display Label: Salary
- Text Field Size: (empty)
- Options:
 - Text field contains comma-separated values
 - Refresh other parameters on change

Adding a Bind Variable to a Query

Edit Data Set - Employees

* Name Employees

* Data Source demo (Default)

* Type of SQL Standard SQL

* SQL Query

```
select "DEPARTMENTS"."DEPARTMENT_NAME" as "DEPARTMENT_NAME",
"EMPLOYEES"."SALARY" as "SALARY",
"EMPLOYEES"."MANAGER_ID" as "MANAGER_ID",
"EMPLOYEES"."JOB_ID" as "JOB_ID",
"EMPLOYEES"."FIRST_NAME" as "FIRST_NAME",
"EMPLOYEES"."LAST_NAME" as "LAST_NAME"
from "OE"."DEPARTMENTS" "DEPARTMENTS",
"OE"."EMPLOYEES" "EMPLOYEES"
where "DEPARTMENTS"."DEPARTMENT_ID"="EMPLOYEES"."DEPARTMENT_ID"
```

Add Parameter - Employees

Please select one or more bind variables to create corresponding parameters

P_dept

When you have added a bind variable, you will be asked to select a variable to create corresponding parameter, while saving the query.

The SQL Query for the simple salary report without any bind variable

Edit Data Set - Employees

* Name Employees

* Data Source demo (Default)

* Type of SQL Standard SQL

* SQL Query

Query Builder

```
select "DEPARTMENTS"."DEPARTMENT_NAME" as "DEPARTMENT_NAME",
"EMPLOYEES"."SALARY" as "SALARY",
"EMPLOYEES"."MANAGER_ID" as "MANAGER_ID",
"EMPLOYEES"."JOB_ID" as "JOB_ID",
"EMPLOYEES"."FIRST_NAME" as "FIRST_NAME",
"EMPLOYEES"."LAST_NAME" as "LAST_NAME"
from "OE"."DEPARTMENTS" "DEPARTMENTS",
"OE".EMPLOYEES EMPLOYEES
where "DEPARTMENTS"."DEPARTMENT_ID"="EMPLOYEES"."DEPARTMENT_ID"
and "DEPARTMENTS"."DEPARTMENT_NAME" IN (:P_dept)
```

Generate Explain Plan OK Cancel

The SQL query for the salary report after the bind variable is added

Adding a Bind Variable to a Query

Emp_Report

Department All

All
Administration
Marketing
Purchasing
Human Resources
Shipping
IT
Public Relations
Search ... F12

Apply

Home Catalog New ▾

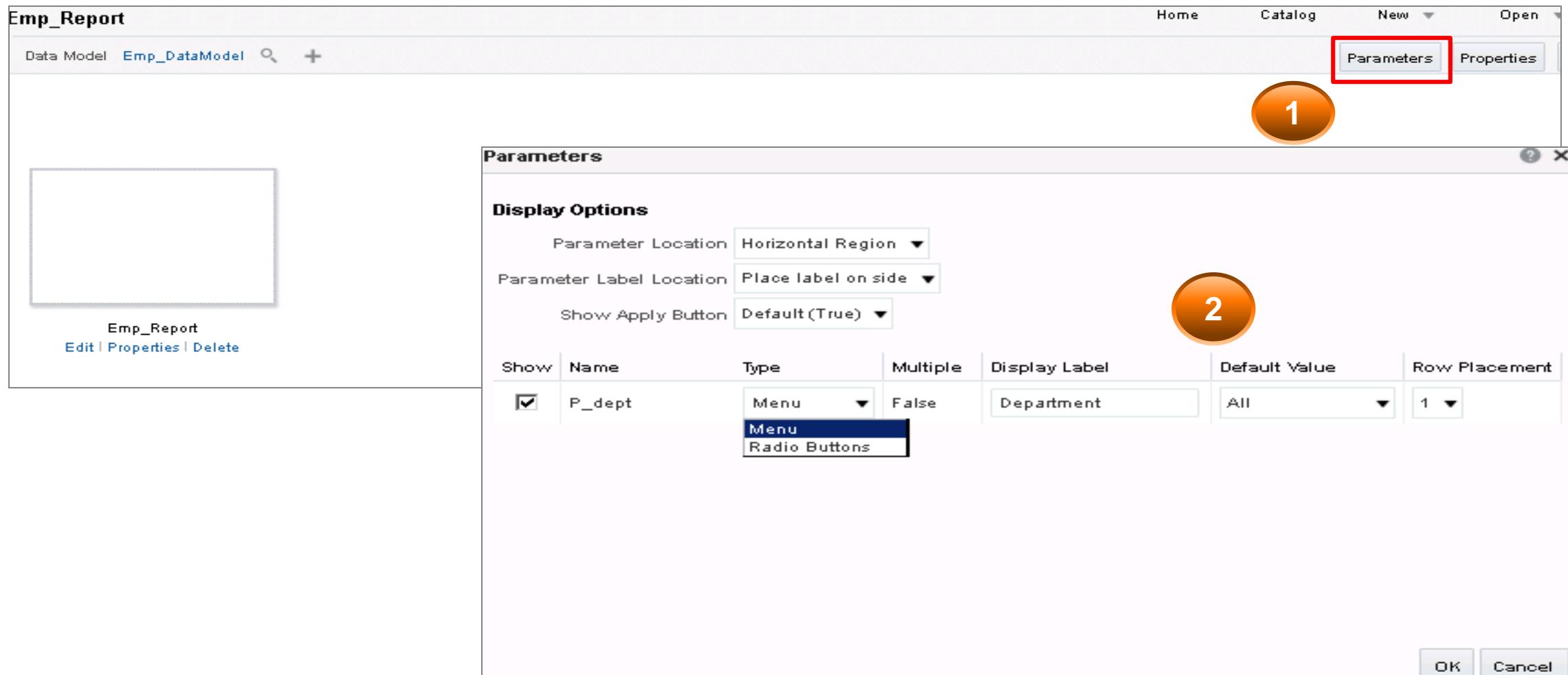
Emp_Report

Enter the parameter value and click Apply.

The bar chart displays the salary distribution across various departments. The Y-axis represents salary in thousands, ranging from 0K to 350K. The X-axis represents the department names. The chart shows that the Sales department has the highest average salary, followed by Marketing and Finance.

DEPARTMENT_NAME	JOB_ID	LAST_NAME	SALARY
Administration	AD_ASST	Whalen	4400
Marketing	MK_MAN	Hartstein	13000
Marketing	MK_REP	Fay	6000
Purchasing	PU_MAN	Raphaely	11000
Purchasing	PU_CLERK	Khoo	3100
Purchasing	PU_CLERK	Baida	2900
Purchasing	PU_CLERK	Tobias	2800
Purchasing	PU_CLERK	Himuro	2600
Purchasing	PU_CLERK	Colmenares	2500
Human Resources	HR_REP	Mavris	6500

Configuring Parameter Settings for a Report



Viewing a Report with Parameters

The screenshot shows the Oracle BI Catalog interface. On the left, the 'Folders' tree view includes 'Drafts', 'Learn' (selected), 'weblogic', 'Shared Folders', 'Components', 'Sample Lite', 'Subject Area Content', 'KPIs', 'Published Reporting' (selected), 'Analyses', 'Data Models', 'JDE Samples', and 'Reports'. In the center, a report titled 'Emp_Report' is displayed. The report header shows 'Last Modified 8/2/18 8:09 PM' and 'Created By weblogic'. Below the header is a bar chart titled 'Emp_Report' showing salary distribution across departments. The Y-axis ranges from 0K to 350K. The X-axis is labeled 'SALARY'. The legend lists departments: Administration (blue), Marketing (orange), Purchasing (purple), Human Resources (green), Shipping (yellow), IT (pink), Public Relations (light green), Sales (dark purple), Executive (medium green), Finance (yellow-green), and Accounting (dark blue). A table below the chart lists employee data:

DEPARTMENT_NAME	JOB_ID	LAST_NAME	SALARY
Administration	AD_ASST	Whalen	4400
Marketing	MK_MAN	Hartstein	13000
Marketing	MK_REP	Fay	6000
Purchasing	PU_MAN	Raphaelv	11000

On the right, a context menu for the report is open, with several items highlighted by red boxes: 'Edit Report', 'Edit Layout', 'Export', 'Send', 'Schedule', 'Jobs', 'Job History', 'Republish from History', and 'Share Report Link'.

Viewing a Report with Parameters

Emp_Report

Data Model Emp_DataModel

Home Catalog New Open

Parameters Properties

Emp_Report

Edit | Properties | Delete

Parameters

Display Options

Parameter Location Horizontal Region ▾

Parameter Label Location Place label on side ▾

Show Apply Button Default (True) ▾

Show	Name	Type	Multiple	Display Label	Default Value	Row Placement
<input checked="" type="checkbox"/>	P_dept	Menu ▾	False	Department	All ▾	1 ▾
Menu						
Radio Buttons						

OK Cancel

Viewing a Report with Parameters

The screenshot illustrates the process of viewing a report with parameters, specifically focusing on the Department filter.

Left Panel: Shows the parameter selection dialog for the "Department" filter. A red box highlights the dropdown menu where "Marketing;Shipping" is selected. Below the dialog, a blue box contains the text: "Report with only the selected few variables for the parameter Department".

Middle Panel: Shows the report interface with the "Department" parameter set to "All". A blue box contains the text: "Report with all the parameters being displayed".

Right Panel: Shows a bar chart titled "Emp_Report" displaying salary distribution by department. The Y-axis represents salary from 0K to 350K. The X-axis lists departments: DEPARTMENT_NAME, JOB_ID, LAST_NAME, and SALARY. The legend identifies the departments by color: Administration (dark blue), Marketing (red), Purchasing (purple), Human Resources (teal), Shipping (orange), IT (pink), Public Relations (light green), Sales (dark purple), Executive (green), Finance (yellow), and Accounting (blue).

Department	Count	Approximate Salary Range (K)
Administration	1	10K - 20K
Marketing	1	10K - 20K
Purchasing	1	10K - 20K
Human Resources	1	10K - 20K
Shipping	1	150K - 160K
IT	1	20K - 30K
Public Relations	1	10K - 20K
Sales	1	10K - 20K
Executive	1	50K - 60K
Finance	1	50K - 60K
Accounting	1	10K - 20K

Viewing a Report with Parameters

Salary Report - Checkboxes

Home Catalog New Open Signed In As

Report with selected variables for both the parameters

Department: Marketing;Purchasing;Human Resources
Employee: Pat Fay;Den Raphaely;Alexander Khoo
All Michael Hartstein Pat Fay Den Raphaely Alexander Khoo Shelli Baida

Apply

Total Annual Salary Distribution by Department

Annual Salary

Marketing Purchasing

29.85%

Filtering the report further with the second parameter choices

Manager Summary

Salary Report

Proprietary and Confidential

Total Employee Annual Salary by Manager

Annual Salary

Michael Hartstein Steven King Den Raphaely

140K
120K
100K
80K
60K
40K
20K
0K

The screenshot shows a salary report interface with the following components:

- Parameter Selection:** Two dropdown menus for "Department" and "Employee" with checkboxes for selection. The "Employee" menu is highlighted with a red border and contains checked boxes for "Pat Fay", "Den Raphaely", and "Alexander Khoo". A callout box labeled "Filtering the report further with the second parameter choices" points to this menu.
- Pie Chart:** A pie chart titled "Total Annual Salary Distribution by Department" showing the percentage distribution between Marketing (dark blue) and Purchasing (light green). The Purchasing slice is labeled "29.85%".
- Bar Charts:** Two bar charts titled "Total Employee Annual Salary by Manager". The left chart shows salaries for Michael Hartstein (~75K), Steven King (~135K), and Den Raphaely (~40K). The right chart is identical. A callout box labeled "Report with selected variables for both the parameters" points to the top navigation bar.

Adding LOVs: Fixed Type

Emp_DataModel

Home Catalog New Open

Manage Private Data Sources | View Data

Data Model

Properties

- Data Sets
 - Employees
- Event Triggers
- Flexfields
- List of Values
 - Value_YR
- Parameters
- P_dept
- Bursting

List of Values

+ X

*Name	Type	Data Source	Reorder
Value_YR	Fixed Data		

Dept_LOV: Type: Fixed Data

+ X

*Label	*Value
2008	2008
2009	2009
2010	2010

Fixed_Lov_report

Home Catalog New

Year 2008 Apply

Annual Product Revenue

The chart displays revenue in thousands of dollars for 2008 across different products. The Y-axis ranges from 0K to 140K. Products include Adaptor, Bluetooth, S-Phone, KeyMax, MicroPod, Touch-Screen, T5, Digital Camera, FunPod-7 Megapixel, FunPod-MaxiFun, FunPod-HomeCoach, 2000, FunPod-MaxiFun, HomeView-Install, HomeView-LCD HD, HomeView-Plasma HD, Television, and HomeView-TV.

Product	Revenue (2008)
Adaptor	~45K
Bluetooth	~60K
S-Phone	~55K
KeyMax	~75K
MicroPod	~40K
Touch-Screen	~100K
T5	~100K
Digital Camera	~100K
FunPod-7 Megapixel	~100K
FunPod-MaxiFun	~65K
FunPod-HomeCoach	~40K
2000	~125K
FunPod-MaxiFun	~65K
HomeView-Install	~120K
HomeView-LCD HD	~65K
HomeView-Plasma HD	~45K
Television	~70K
HomeView-TV	~20K
Total	~1350K

Per_Name_Year

Per_Name_Year	Brand	Product
2008	BizTech	Bluetooth Adaptor
2008	BizTech	MP3 Speakers System
2008	BizTech	MicroPod 60Gb
2008	BizTech	SoundX Nano 4Gb

Cascading Parameters

Salary Report - Checkboxes

Home Catalog New Open Signed In As weblog

Simple Advanced Page Totals Batch Manager Salary W-2 2010 (Partial) Manager Summary

Salary Report

Proprietary and Confidential

Employee Total Annual Salary Distribution by Department

Department	Percentage
Human Resources	3.391%
Shipping	15.02%
IT	81.59%

Total Employee Annual Salary by Manager

Manager	Annual Salary (approx.)
Neena Kochhar	50K
Steven King	450K
Matthew Weiss	280K
Adam	300K
Payam Kaufling	280K
Shanta Vollman	300K
Kevin Mourgos	270K
Lex	100K
Alexander Hunold	250K

Annual Salary

Human Resources Shipping IT

Salary Details

Department

- All
- Administration
- Marketing
- Purchasing
- Human Resources
- Shipping
- IT
- Public Relations
- Sales
- Executive
- Finance
- Accounting

Employee

- All
- All
- Jennifer Whalen
- Michael Hartstein
- Pat Fay
- Den Raphaely
- Alexander Khoo

Search ... F12

Quiz: Overview

This quiz examines your knowledge of Data Model Editor and data sets.

Quiz

A data model is an object that resides in the Catalog as a separate object and contains a set of instructions for BI Publisher to retrieve and structure data for a report.

- a. True
- b. False

Quiz

You can now use private JDBC or ODBC data source connections to create a data set.

- a. True
- b. False

Quiz

You will have to return to BI Publisher home page to create a new report for the data model you have created in Data Model Editor.

- a. True
- b. False

Quiz

You can add parameters to a data model definition, enabling users to interact with reports and dynamically specify data of interest.

- a. True
- b. False

Summary

In this lesson, you should have learned how to:

- Describe the samples used for the course
- Describe the features of Data Model Editor
- Define a private data source
- Create and edit a data model based on a SQL Query data set
- Define parameters and a list of values (LOV) for a data model
- Create reports based on this data model

Practice 5: Overview

This practice covers the following topics:

- Defining a private data source
- Creating and editing a data model based on a SQL query data set
- Defining parameters and LOVs for a data model
- Creating a Report based on this data model



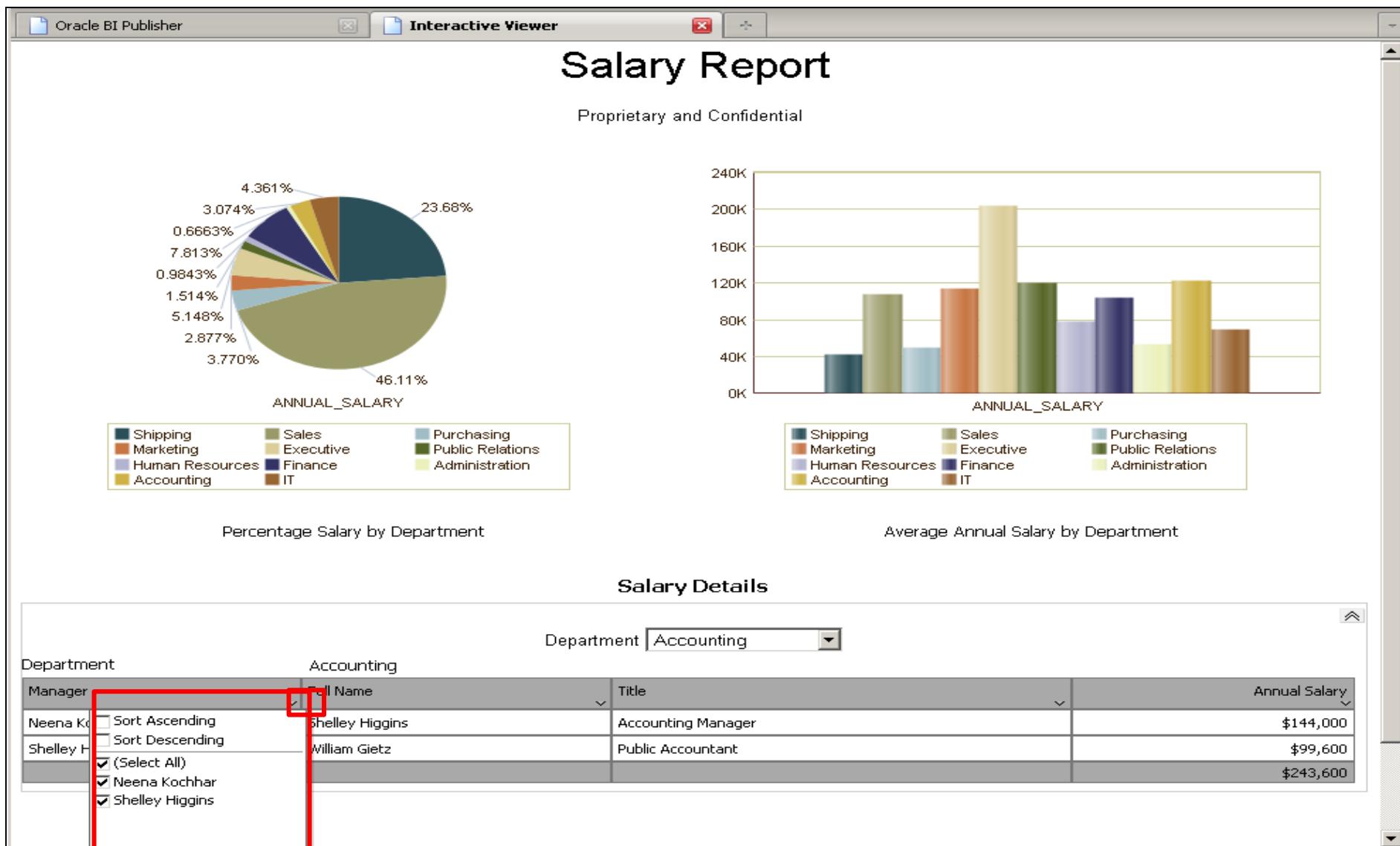
6. Working with Layout Editor

Objectives

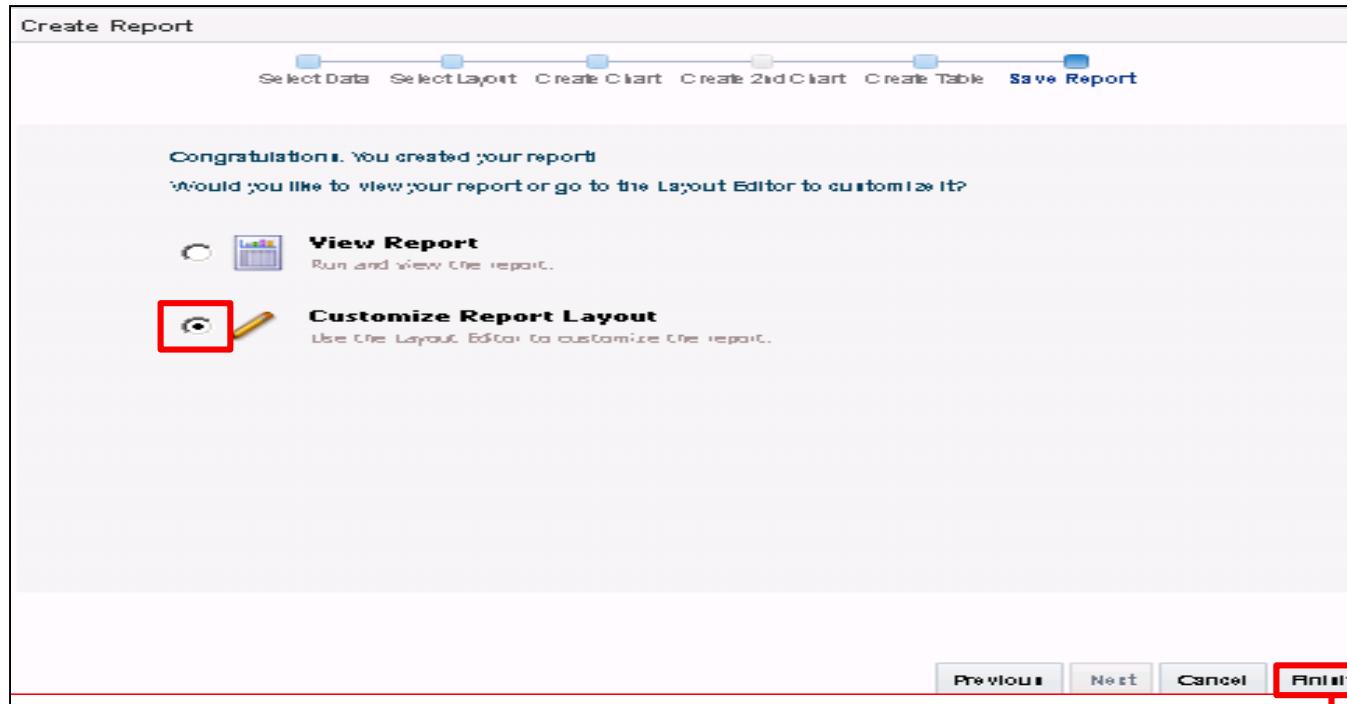
After completing this lesson, you should be able to:

- Describe the Layout Editor tool
- Use Layout Editor to build report layouts
- Work with various layout components
- View and save the layouts

Revisiting Layout Editor



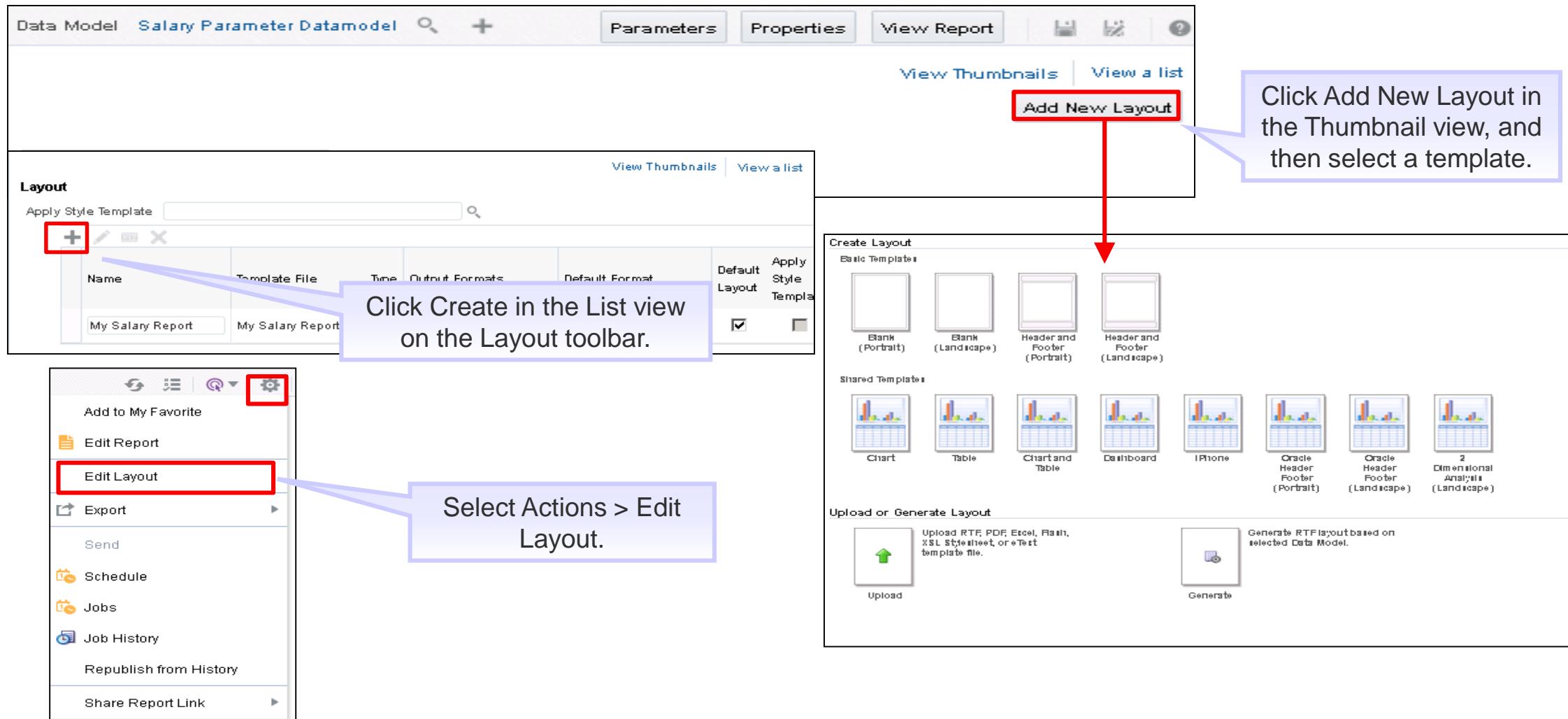
Opening Layout Editor



Save the report.

The screenshot shows the Oracle Reports Layout Editor interface. The title bar says 'Emp_Report : Emp_Report'. The left pane shows the 'Data Source' tree with 'DATA_DS' expanded, showing 'P_dept' and 'G_1' nodes, with 'DEPARTMENT_NAME' under 'G_1'. The right pane shows the 'Components' palette with icons for 'Layout Grid', 'Data Table', 'Chart', 'Pivot Table', 'List', 'Repeating Section', 'Text Item', 'Gauge', and 'Image'. Below the palette is a page layout area with a single section labeled 'Emp_Report'. The status bar at the bottom shows a horizontal ruler from 50 to 800.

Opening Layout Editor



Selecting a Predefined Template

Two types of predefined templates:

- Basic
- Shared

Create Layout

Basic Templates



Blank (Portrait) Blank (Landscape) Header and Footer (Portrait) Header and Footer (Landscape)

Shared Templates



Chart Table Chart and Table Dashboard iPhone 2 Dimensional Analysis (Landscape)

Upload or Generate Layout

 Upload RTF, PDF, Excel, Flash, XSL Stylesheet, or eText template file.

 Generate RTF layout based on selected Data Model.

Upload Generate

Layout Editor Interface

The screenshot shows the Oracle APEX Layout Editor interface for creating a "My Salary Report".

Static Toolbar: Located at the top left, it includes icons for Home, Catalog, New, Open, Signed In As (weblogic), and Done.

Dynamic Toolbar: Located at the top right, it includes icons for Page Break, Page Number, and Total Pages.

Data Source: A tree view on the left showing the data source structure. It includes a ROWSET node with an Employees node, which contains columns for Full Name, First Name, Last Name, Monthly Salary, Annual Salary, Federal Tax Withheld, Title, Department, and Manager. A red box highlights the collapse icon for the entire left pane.

Components: A grid of layout components including Layout Grid, Data Table, Chart, Pivot Table, List, Repeating Section, Text Item, Gauge, and Image.

Page Elements: A grid of page elements including Page Break, Page Number, and Total Pages.

Design Area: The main workspace where a Data Table component is being拖拽 (draggable) over a table structure. The table has columns for Full Name and Monthly Salary. The total salary value of 660400 is highlighted.

Annotations:

- A callout box points to the Data Source pane with the text: "Access data source, layout components, and item properties panes."
- A callout box points to the left pane collapse icon with the text: "Click to collapse the entire left pane."

	Full Name	Monthly Salary
Shipping	Steven King	Matthew Weiss
Shipping	Steven King	Adam Fripp
Shipping	Steven King	Payam Kaufling
Shipping	Steven King	Shanta Vollman
Sales	Steven King	Kevin Mourgos
Sales	Steven King	Gerald Cambrault
Sales	Steven King	Eleni Zlotkey
Sales	Steven King	John Russell
Sales	Steven King	Karen Partners
Sales	Steven King	Alberto Errazuriz
		660400

Navigating the Layout Editor Interface

The screenshot shows the Oracle APEX Layout Editor interface for a report titled "My Salary Report".

Data Source Pane: Located at the top left, it displays the data source structure: "ROWSET Employees" with a selected item "Full Name".

Components Pane: Located at the bottom left, it lists various components: Layout Grid, Data Table, Chart, Pivot Table, Repeating Section, Text Item, Gauge, and Image.

Insert Menu: Located at the top center, it provides options for inserting components like Layout Grid, Data Table, Chart, Pivot Table, List, Repeating Section, Text Item, Gauge, and Image.

Page Elements: Located on the right side of the top bar, it includes options for Page Break, Page Number, and Total Pages.

Report Preview: The main area shows a table with the following data:

Department	Manager	Full Name	Monthly Salary
Shipping	Steven King	Matthew Weiss	8000
Shipping	Steven King	Adam Fripp	8200
Shipping	Steven King	Payam Kaufling	7900
Shipping	Steven King	Shanta Vollman	6500
Shipping	Steven King	Kevin Mourgos	5800
Sales	Steven King	Gerald Cambrault	11000
Sales	Steven King	Eleni Zlotkey	10500
Sales	Steven King	John Russell	14000
Sales	Steven King	Karen Partners	13500
Sales	Steven King	Alberto Errazuriz	12000
			660400

Properties: Located at the bottom left, it provides options for viewing properties and previewing the report.

Navigating the Layout Editor Interface

The screenshot shows the Microsoft Layout Editor interface with two main sections. The top section displays a table with columns: Department, Manager, Full Name, and Monthly Salary. A red box highlights the first row under the 'Department' column. The bottom section shows a similar table with the first two rows visible. A red box highlights the 'Font' properties in the Properties pane for the bottom table's first row.

Properties Pane

The dynamic Column pane appears when a column is selected in the design area

Context sensitive menus share many of the same components found in the Properties pane

Department	Manager	Full Name	Monthly Salary
Shipping	Steven King	Matthew Weiss	8000
Shipping	Steven King	Adam Fripp	8200
Shipping	Steven King	Payam Kaufling	7900
Shipping	Steven King	Shanta Vollman	6500
Shipping	Steven King	Kevin Mourgos	5800

Department	Manager	Full Name	Monthly Salary
Shipping	Steven King	Matthew Weiss	8000
Shipping	Steven King	Adam Fripp	8200

Creating a Layout by Using a Basic Template

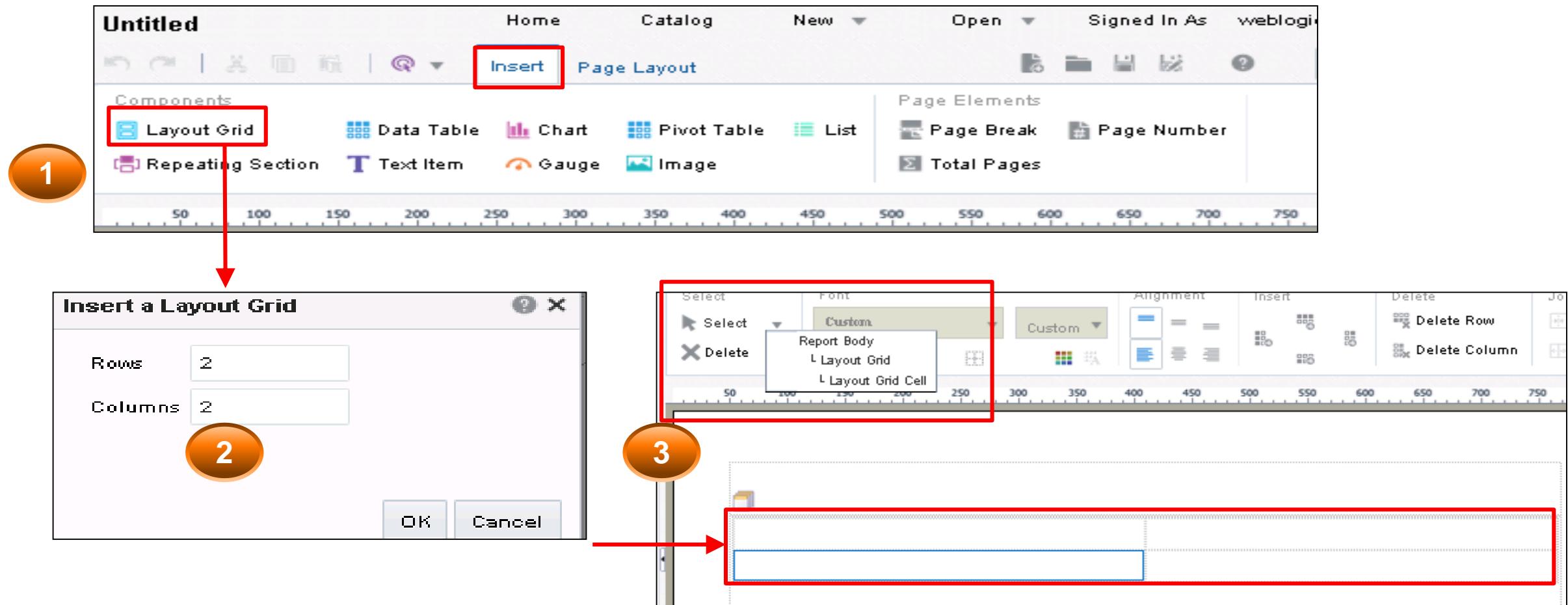
Layout components include:

- Layout Grid
- Data Table
- Chart
- Repeating Section
- Text Item
- Image
- List
- Gauge
- Pivot Table
- Plug-ins

You can:

- Format data
- Add page layout features
- Save a layout
- Create a boilerplate

Inserting a Layout Grid

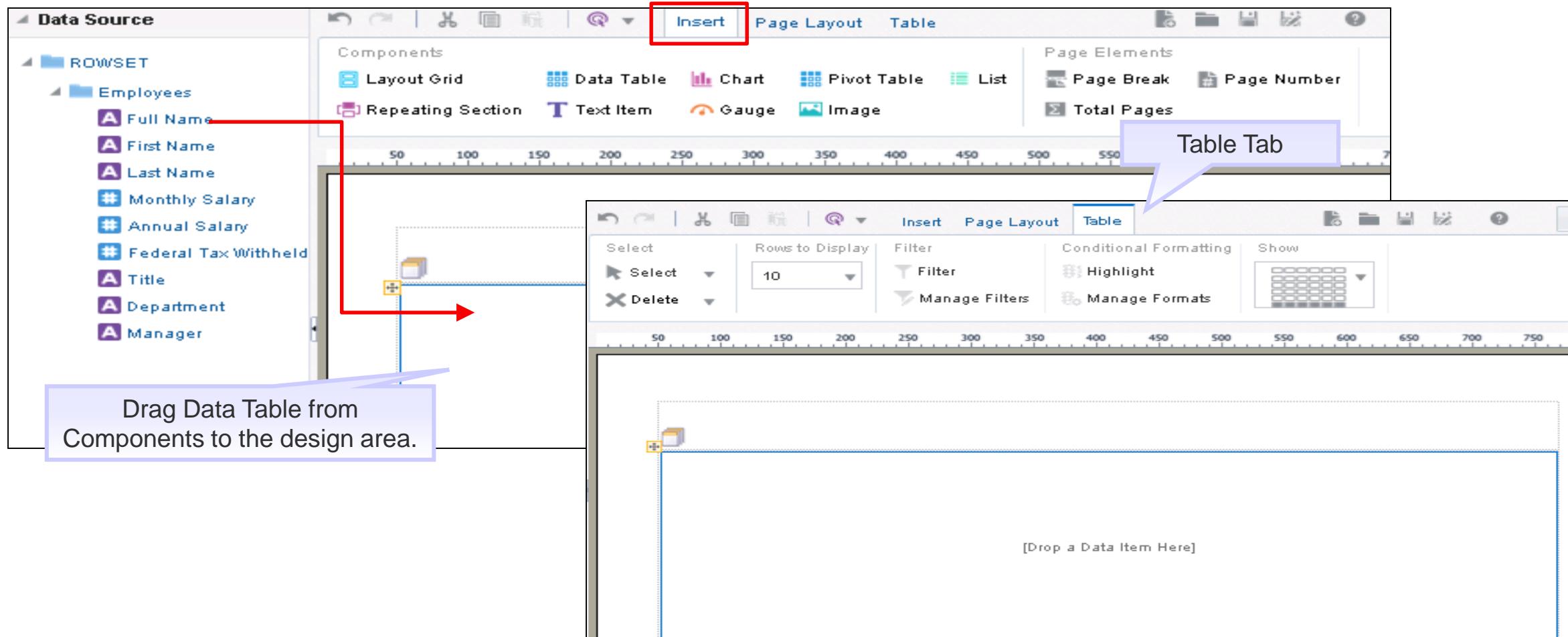


Working with Data Tables

When working with data tables, you can perform the following tasks:

- Insert a data table.
- Add data fields.
- Work with the Table tab and other dynamic menus.
- Format data:
 - Add background, text colors, and fonts.
 - Add number formats.
 - Define groups, subtotals, and sorts.
 - Apply conditional formats.
 - Set up filters.

Inserting a Data Table



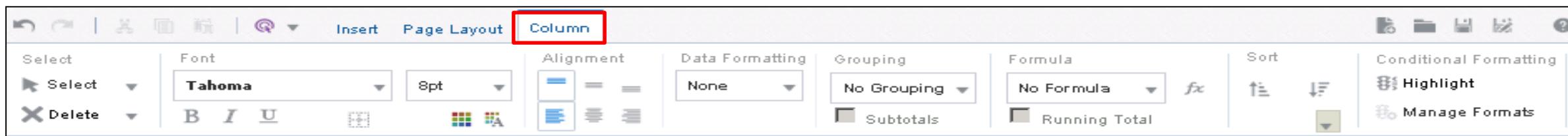
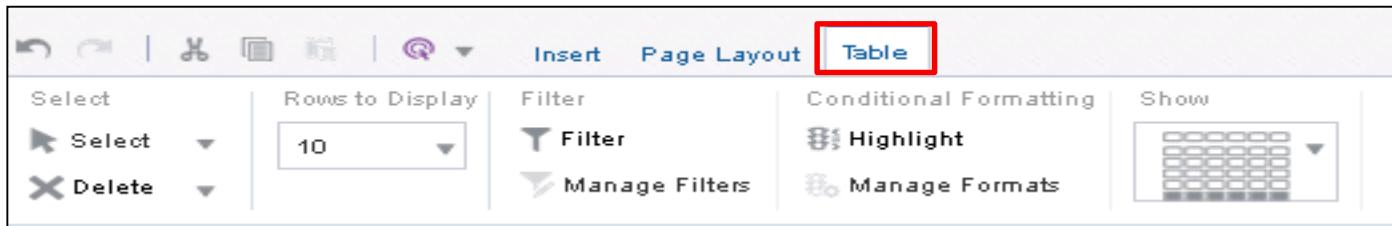
Adding Data Fields

The screenshot shows a report design interface with a toolbar at the top and a data source tree on the left. A red box highlights the 'Data Source' tab in the toolbar. A red arrow points from the 'Department' field in the data source tree to the 'Properties' panel, which is also highlighted with a red box. A purple callout box with the text 'Drag the data columns to the table layout.' is positioned over the table layout area. The table layout contains the following data:

Department	Manager	Full Name	Annual Salary
Shipping	Steven King	Matthew Weiss	96000
Shipping	Steven King	Adam Fripp	98400
Shipping	Steven King	Payam Kauffling	94800
Shipping	Steven King	Shanta Vollman	78000
Shipping	Steven King	Kevin Mourgos	69600
Sales	Steven King	Gerald Cambrault	132000
Sales	Steven King	Eleni Zlotkey	126000
Sales	Steven King	John Russell	168000
Sales	Steven King	Karen Partners	162000
Sales	Steven King	Alberto Erazuriz	144000
		Total	7924800

A purple callout box with the text 'Total is automatically inserted.' is positioned over the last row of the table.

Table Tab and Dynamic Table Menus



Formatting Data in a Table

The screenshot shows a data visualization interface with a main table and two floating toolbars.

Table Column Header Tab: A purple callout points to the top tab of the floating toolbar on the right, which contains buttons for "Insert", "Page Layout", and "Table Column Header".

Column Tab: A purple callout points to the second tab from the left on the floating toolbar, labeled "Column".

Color Picker: A color picker dialog is open on the left, showing a hex code of "000000" and a preview square. It includes sections for "Last Used Color", "Default Color", a color palette, and "Custom Color..." buttons, along with "OK" and "Cancel" buttons at the bottom.

Table Data: The main area displays a table with the following data:

Department	Manager	Full Name	Monthly Salary
Shipping	Steven King	Matthew Weiss	8000
Shipping	Steven King	Adam Fripp	8200
Shipping	Steven King	Payam Kaufling	7900
Shipping	Steven King	Shanta Vollman	6500
Shipping	Steven King	Kevin Mourgos	5800
Sales	Steven King	Gerald Cambrault	11000
Sales	Steven King	Eleni Zlotkey	10500
Sales	Steven King	John Russell	14000
Sales	Steven King	Karen Partners	13500
Sales	Steven King	Alberto Errazuriz	12000
			660400

Adding Number and Date Formats

The screenshot shows a Microsoft Access interface with a chart and a table.

Chart: A bar chart titled "SALARY" is displayed. The Y-axis ranges from 0K to 9K. The X-axis has categories labeled 50, 100, 150, 200, 250, 300, 350, 400, 450, 500. The bars are colored blue, orange, and purple.

Table: A table with columns "DEPARTMENT_NAME", "SALARY", and "HIRE_DATE". The data is as follows:

DEPARTMENT_NAME	SALARY	HIRE_DATE
Administration	4400	2003-09-17T00:00:00.000+00:00
Marketing	13000	2004-02-17T00:00:00.000+00:00
Marketing	6000	2005-08-17T00:00:00.000+00:00
Purchasing	11000	2002-12-07T00:00:00.000+00:00
Purchasing	3100	2003-05-18T00:00:00.000+00:00
	37500	

Context Menus:

- A red box highlights the "SALARY" column header in the table, with a red arrow pointing to it from the left.
- A red box highlights the "SALARY" field in the table row for Purchasing, with a red arrow pointing to it from the left.
- A red box highlights the "HIRE_DATE" field in the table row for Marketing, with a red arrow pointing to it from the left.
- A red box highlights the "SALARY" field in the table row for Purchasing, with a red arrow pointing to it from the right.
- A red box highlights the "HIRE_DATE" field in the table row for Marketing, with a red arrow pointing to it from the right.
- A blue box labeled "Format SALARY." points to the "SALARY" field in the table row for Purchasing.
- A blue box labeled "Format HIREDATE." points to the "HIRE_DATE" field in the table row for Marketing.

Format SALARY.

Format HIREDATE.

Data Formatting Context Menu (SALARY):

- 1,234.57 (Number)
- 1,235 (Number without decimal)
- 12% (Percent)
- (\$1,234.57) (Currency)
- \$1,234.57

Data Formatting Context Menu (HIREDATE):

- 8/3/18 (Date)
- Aug 3, 2018
- Friday, August 3, 2018

Data Formatting Context Menu (HIRE_DATE):

- 8/3/18 2:44 PM (Time)
- Aug 3, 2018 2:44 PM
- Friday, August 3, 2018 2:44 PM

Defining Groups and Subtotals

The screenshot shows two Microsoft Word document windows demonstrating grouping and subtotaling.

Top Document: Shows the ribbon tabs: Insert, Page Layout, Column. The Column tab is selected. The font is set to Tahoma, 8pt. The grouping dropdown menu is open, showing options: No Grouping, Group Left, and Group Above. The "Group Left" option is highlighted with a red box.

Bottom Document: Shows the ribbon tabs: Insert, Page Layout, Column. The font is set to Tahoma, 8pt. The grouping dropdown menu is open, showing options: No Grouping, Group Left, and Group Above. The "Subtotals" checkbox is checked, indicated by a checked icon and a red box.

Data View: A table with columns: Department, Manager, Full Name, and Monthly Salary. The data is grouped by Department. A callout bubble labeled "Grouped left" points to the "Shipping" group. A callout bubble labeled "SubTotal" points to the total row for "Matthew Weiss".

Department	Manager	Full Name	Monthly Salary
Shipping	Steven King	Matthew Weiss	8000
Shipping		Adam Fripp	8200
Shipping		Payam Kaufling	7900
Shipping		Shanta Vollman	6500
Shipping		Kevin Mourgos	5800
			36400
		S	2200
		James Landry	2400
		Irene Mikkilineni	2700
			22100
			660400

Defining Sorts

Sorted ascending as the first priority

Sorted descending as the second priority

Department	Manager	Full Name	Monthly Salary
Accounting	Neena Kochhar	Shelley Higgins	12000
			12000
Administration	Neena Kochhar	William Gietz	8300
			8300
Executive	Steven King	Jennifer Whalen	4400
		Neena Kochhar	4400
Finance	Neena Kochhar	Lex De Haan	17000
		Nancy Greenber	17000
			34000

Applying Conditional Formats

The screenshot shows the Microsoft Excel ribbon with the 'Column' tab selected. The 'Conditional Formatting' button in the 'Styles' group is highlighted with a red box. A 'Highlight' dialog box is open, also with a red box around its title bar. The dialog box contains settings for applying conditional formatting based on the value of the 'Monthly Salary' column being less than 3000, with a red background color.

Conditional Formatting

- Highlight
- Manage Formats

Highlight

Data Field: Monthly Salary

Operator: is less than

Value: 3000

Font Family: [dropdown]

Size: [dropdown]

Color: [color swatch]

Background Color: Red

Text Indent: 0 px

Preview: Value 123

OK Cancel

Department	Manager	Full Name	Monthly Salary
Accounting	Neena Kochhar	Shelley Higgins	12000
	Shelley Higgins	William Gietz	8300
Administration	Neena Kochhar	Jennifer Whalen	4400
	Steven King	Neena Kochhar	17000
Executive	Steven King	Lex De Haan	17000
	Neena Kochhar	Nancy Greenberg	34000
Finance	Neena Kochhar	Nancy Greenberg	12000
			12000
			660400

Applying Conditional Formats

The screenshot shows a Microsoft Excel spreadsheet with a table of employee salaries. The table has columns for Department, Manager, Full Name, and Monthly Salary. Conditional formats are applied to the 'Monthly Salary' column based on its value:

- Yellow:** Salary between \$5,000 and 10,000. This format is applied to several cells in the 'Monthly Salary' column.
- Red:** Salary < \$5,000. This format is applied to one cell in the 'Monthly Salary' column.
- Green:** Salary > \$10,000. This format is applied to most cells in the 'Monthly Salary' column.

The 'Conditional Formatting' ribbon tab is selected, and the 'Manage Formats' button is highlighted with a red box and arrow. A callout bubble points from the yellow cells to the 'Yellow: Salary between \$5,000 and 10,000' rule in the 'Manage Conditional Formats' dialog box. Another callout bubble points from the red cell to the 'Red: Salary < \$5,000' rule. A third callout bubble points from the green cells to the 'Green: Salary > \$10,000' rule.

Manage Conditional Formats

Conditional Formats for Current Selection:

1 'Monthly Salary' is less than '3,000' Value 123

Department	Manager	Full Name	Monthly Salary
Accounting	Na	Yellow: Salary between \$5,000 and 10,000	12000 12000 8300 8300
Administration	Ne	Red: Salary < \$5,000	4400 4400
Executive	Steven King	Neena Kochhar Lex De Haan	17000 17000 34000
Finance	Neena Kochhar	Nancy C	12000 12000 660400

Defining a Table Filter

The screenshot shows a Microsoft Excel interface with a table titled "Employee Data". The table has columns for Department, Manager, and Full Name. A filter dialog box is open, overlaid on the table. The filter dialog has the following settings:

- Data Field: Full Name
- Operator: is equal to
- Value: Nancy Greenberg (highlighted in green)

A red box highlights the "Filter" button in the ribbon, and a red arrow points from this button to the "Filter" dialog box.

Department	Manager	Full Name
Accounting	Neena Kochhar	Shelley Higgins
		William G. Williams
Administration	Neena Kochhar	Jennifer W. Rogers
		Lex Dehaan
Executive	Steven King	Neena Kochhar
		Lex Dehaan
Finance	Neena Kochhar	Nancy Greenberg
		12000
		12000
		660400

Defining a Table Filter

The screenshot illustrates the process of defining a table filter in Microsoft Excel. At the top, a 'Filter' dialog box is open, showing the configuration for filtering the 'Department' field. The 'Data Field' is set to 'Department', the 'Operator' is 'is equal to', and the 'Value' is 'IT'. A red box highlights the 'Data Field' dropdown. Below the dialog, the Excel ribbon shows the 'Table' tab selected. The main area displays a table of employee data. A horizontal scroll bar at the bottom indicates the table spans from column 50 to 750. Above the table, a color-coded legend identifies the departments: Accounting (yellow), IT (dark blue), and Sales (red). The table itself has four columns: 'Department', 'Manager', 'Full Name', and 'Monthly Salary'. The 'Department' column uses a dropdown menu to filter rows for the 'IT' department. The data shows several employees from the IT department, each managed by Lex De Haan or Alexander Hunold, with their respective monthly salaries.

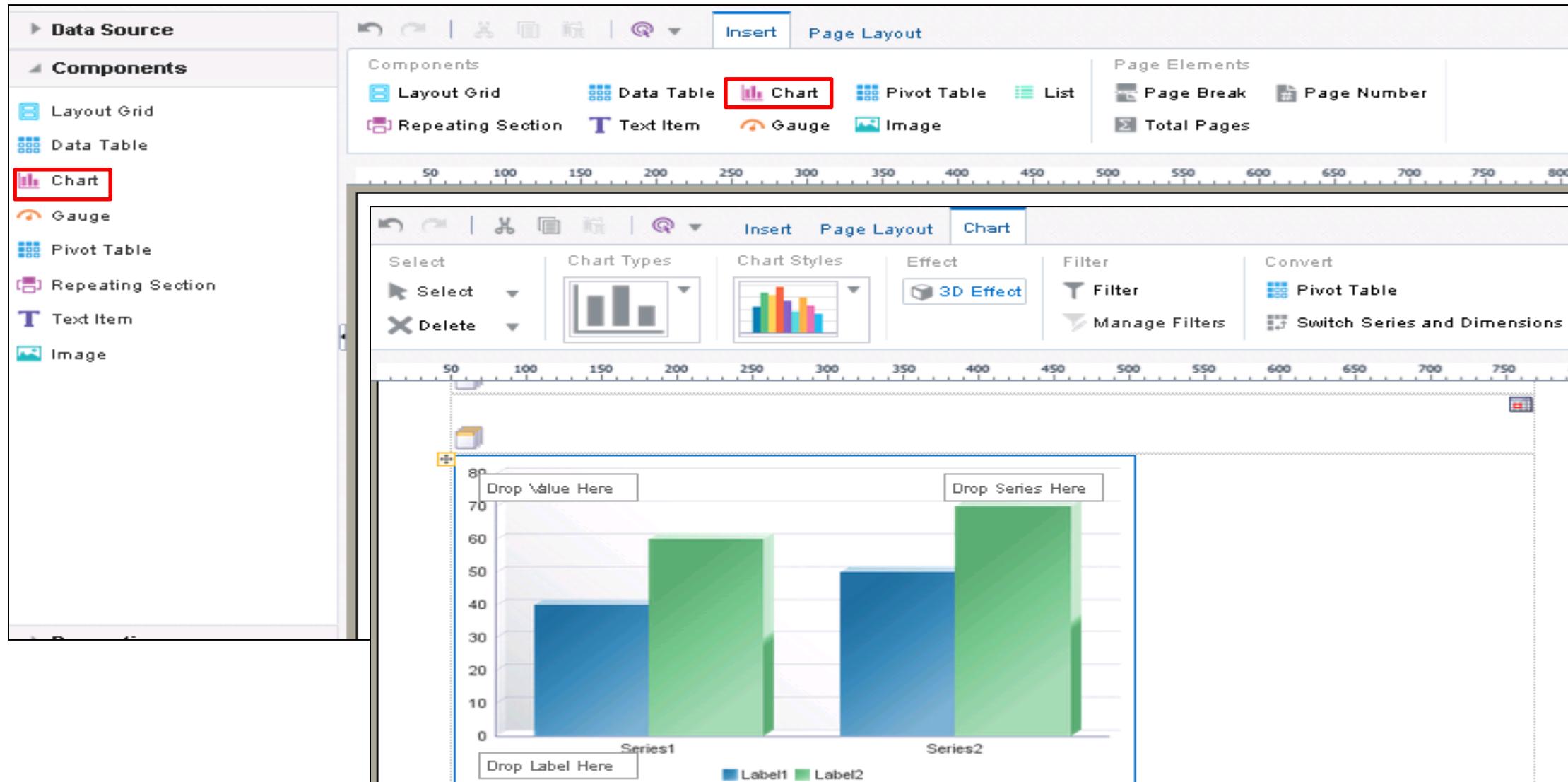
Department	Manager	Full Name	Monthly Salary	
IT	Lex De Haan	Alexander Hunold	9000	
			9000	
		Alexander Hunold	Diana Lorentz	4200
			David Austin	4800
			Valli Pataballa	4800
IT	Bruce Ernst	Bruce Ernst	6000	
			19800	
			28800	

Working with Charts

When working with charts, you perform the following tasks:

- Insert a chart.
- Add the appropriate data fields to the chart.
- Edit the chart.

Inserting a Chart



Adding Data Fields to a Chart

The screenshot shows a software interface for creating charts. On the left, a 'Data Source' pane lists fields from a 'Employees' rowset: Full Name, First Name, Last Name, Monthly Salary, Annual Salary, Federal Tax Withheld, Title, Department, and Manager. A red box highlights 'Monthly Salary' and 'Department'. In the center, a chart area displays two bars: a blue bar for 'Shipping' at approximately 150K and a green bar for 'Sales' at approximately 300K. A red arrow points from the 'Monthly Salary' field in the data source to the 'Drop Value Here' placeholder in the chart's value area. Another red arrow points from the 'Department' field in the data source to the 'Drop Series Here' placeholder in the chart's series area. The chart has a legend at the bottom identifying the departments by color: Shipping (blue), Marketing (orange), Sales (green), Purchasing (yellow), Public Relations (cyan), Executive (purple), Resources (pink), Finance (magenta), IT (light purple), and Administration (light blue). The chart title is 'Monthly Salary'.

Editing Charts

After adding a chart, you edit chart properties by using:

- The Chart menu
- The Properties pane

The screenshot shows the Microsoft Power BI desktop application. On the left, the 'Properties' pane is open, displaying various chart settings under the 'Appearance' section. In the center, a bar chart titled 'Monthly Salary' is displayed, showing salary data for different departments. At the bottom, a data grid shows the underlying data for the chart.

Properties Pane (Left):

- Data Source
- Components
- Properties
- Appearance
 - Border Bottom
 - Border Left
 - Border Right
 - Border Top
 - Margin: 0px x 0px x 12px x 0px
 - Padding: 0px x 0px x 0px x 0px
- Chart
- Chart Effect
- Chart Legend
- Chart Plot Area
- Chart Title
- Chart Label
- Chart Value (1)
- Chart Value (2)
- Time Series
- Misc

Chart Area (Center):

Properties (Top Bar):

- Select
- Chart Types
- Chart Styles
- Effect
- Filter
- Convert
 - Pivot Table
 - Switch Series and Dimensions

Chart Data:

Department	Monthly Salary
Shipping	150K
Sales	300K
Purchasing	10K
Executive	30K
Public Relations	10K
Finance	40K
IT	20K
Administration	10K

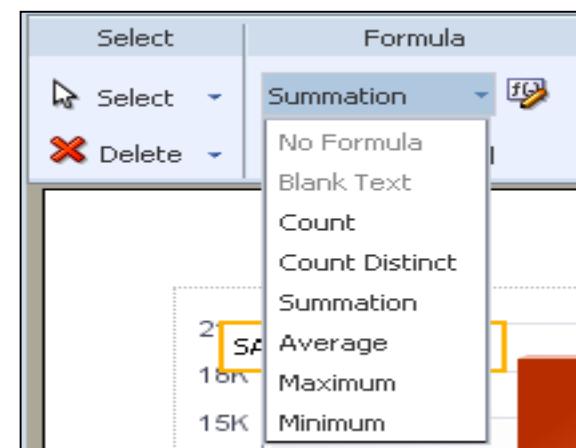
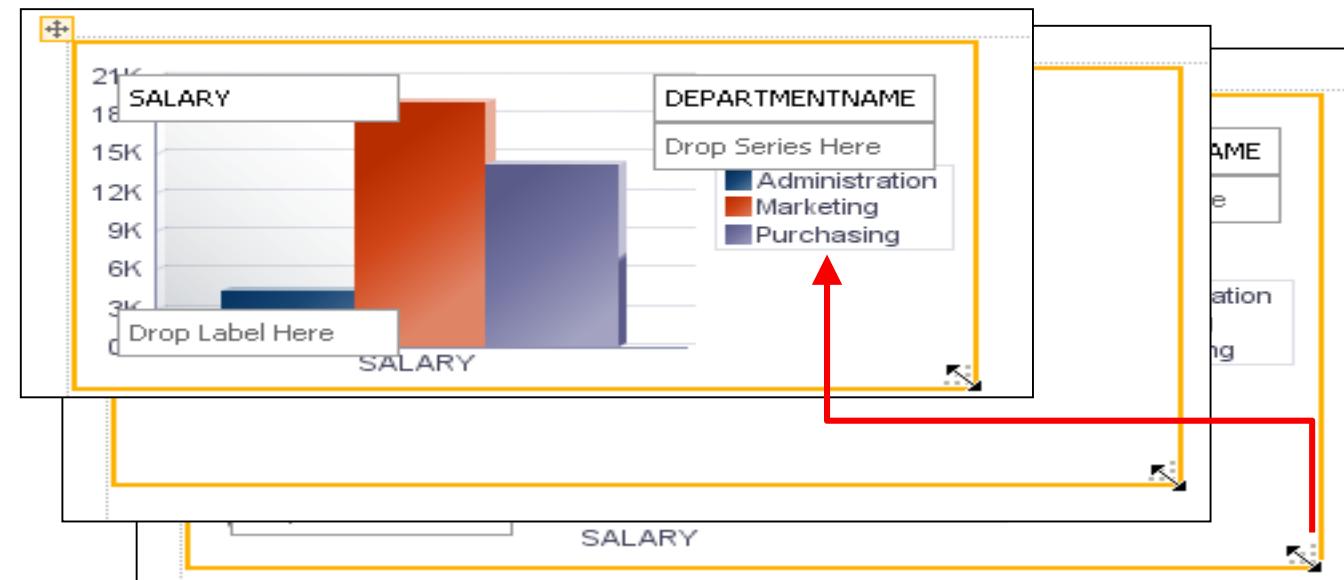
Data Grid (Bottom):

Department	Manager	Full Name	Monthly Salary
IT	Lex De Haan	Alexander Hunold	9000

Editing Charts: Additional Tasks

You can perform the following additional tasks:

- Resize the chart.
- Change the formula applied to a measure.
- Sort a chart field.
- Convert a chart to a pivot table.
- Apply filters.

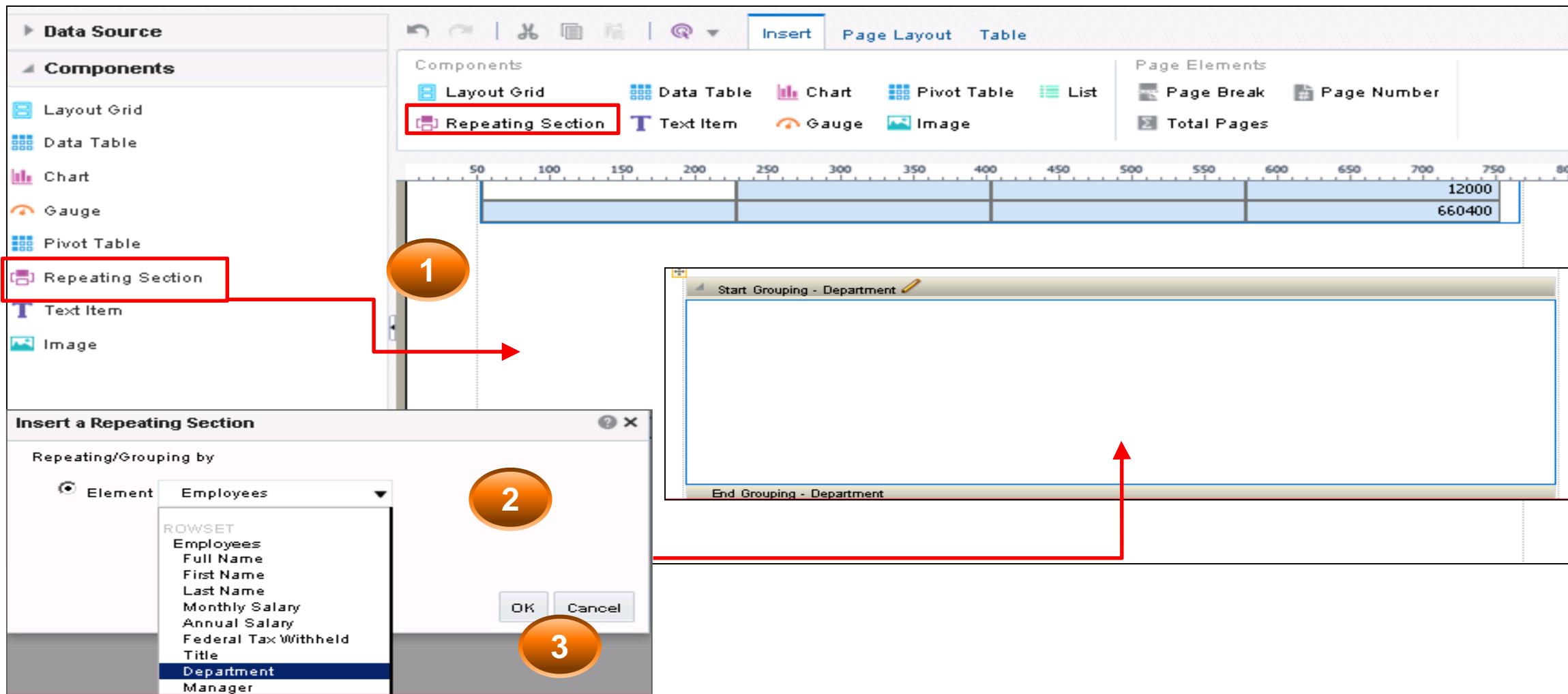


Practices 6-1 and 6-2: Overview

These practices cover the following topics:

- Exploring Layout Editor
- Creating and editing layouts by using Layout Editor
- Inserting a layout grid
- Working with layout components
- Saving the layouts
- Inserting a data table
- Applying conditional formats
- Working with charts
- Inserting and editing charts

Working with Repeating Sections



Working with Repeating Sections

The screenshot shows a Microsoft Word document titled "My Salary Report" dated "Aug 3, 2018". The document contains a chart titled "Start Grouping - Department" showing "Monthly Salary" for various departments. A callout bubble with the number "4" points to the chart area. Below the chart is a data table with columns "Department" and "Manager". A callout bubble points to this table with the text "A chart and a data table added along with the corresponding data fields". To the right of the chart is another chart showing "Annual Salary" for the selected department, with a dropdown menu set to "Accounting". A callout bubble points to this chart with the text "Select the Department.". The Word ribbon at the top includes tabs for Insert, Page Layout, and Chart.

Report viewed interactively

My Salary Report

Aug 3, 2018

Start Grouping - Department

4

Monthly Salary

350K
300K
250K
200K
150K
100K
50K
0K

Shipping Sales Public Relations Purchasing HR Accounting

Drop Label Here

Department Manager

Accounting Neena Kochhar

Shelley Higgins

Administration Neena Kochhar

Executive Steven King

Finance Neena Kochhar

A chart and a data table added along with the corresponding data fields

Select the Department.

Department Accounting

300K
250K

Annual Salary

50K
0K

Department	Manager	Full Name	Monthly Salary
Accounting	Neena Kochhar	Shelley Higgins	12000
Accounting	Shelley Higgins	William Gietz	8300
			20300

Working with Text Items and Images

The screenshot shows a report editor interface with the following elements:

- Toolbar:** Includes icons for back, forward, search, and navigation, followed by tabs for **Insert**, **Page Layout**, and **Text**.
- Components Panel:** Shows categories like **Layout Grid**, **Data Table**, **Chart**, **Pivot Table**, **List**, **Repeating Section**, **Text Item** (highlighted with a red box), **Gauge**, and **Image** (highlighted with a red box).
- Page Elements Panel:** Shows options for **Page Break**, **Page Number**, and **Total Pages**.
- Report Preview Area:** Displays a section titled "My Sales" with a text item containing the text "This report was generated: August 2018".
- Insert an Image Dialog:** A modal window titled "Insert an Image" with the following fields:
 - Select the image from a local directory.** (radio button selected)
 - Browse...** button (No file selected)
 - File Types:** GIF, JPEG, PNG, BMP
 - Size Limit:** 10MB
 - Enter the URL for the image.** (radio button)
 - http://** input field
 - Select the data field for the image URL and for the alternative text.** (radio button)
 - Image URL:** **Full Name** input field
 - Alternative Text:** **Alternative Text** input field- Buttons:** **Insert** and **Cancel** buttons at the bottom right of the dialog.

Working with Lists

The screenshot shows a report builder interface with the following components:

- Data Source:** On the left, a tree view of data sources. A red box highlights the "Department" node under the "Employees" category.
- Toolbar:** At the top, there is a toolbar with icons for back, forward, search, and other functions. The "Insert" button is highlighted with a red box.
- Components:** Below the toolbar is a palette of components. The "List" component is highlighted with a red box.
- Table:** In the main content area, there is a table with the following data:

Department	Manager	Full Name	Monthly Salary
Shipping	Steven King	Matthew Weiss	8000
Shipping	Steven King	Adam Fripp	8200
Shipping	Steven King	Payam Kaufling	7900
Shipping	Steven King	Shanta Vollman	6500
Shipping	Steven King	Kevin Mourgos	5800
Sales	Steven King	Gerald Cambrault	11000
Sales	Steven King	Eleni Zlotkey	10500
Sales	Steven King	John Russell	14000
Sales	Steven King	Karen Partners	13500
Sales	Steven King	Alberto Erazuriz	12000
			660400

Below the table, a section titled "End Grouping - Department" contains a list of department names:

- Accounting
- Administration
- Executive
- Finance
- Human Resources
- IT
- Marketing
- Public Relations
- Purchasing
- Sales
- Shipping

Working with Gauges

The screenshot shows a report builder interface for creating a "My Salary Report".

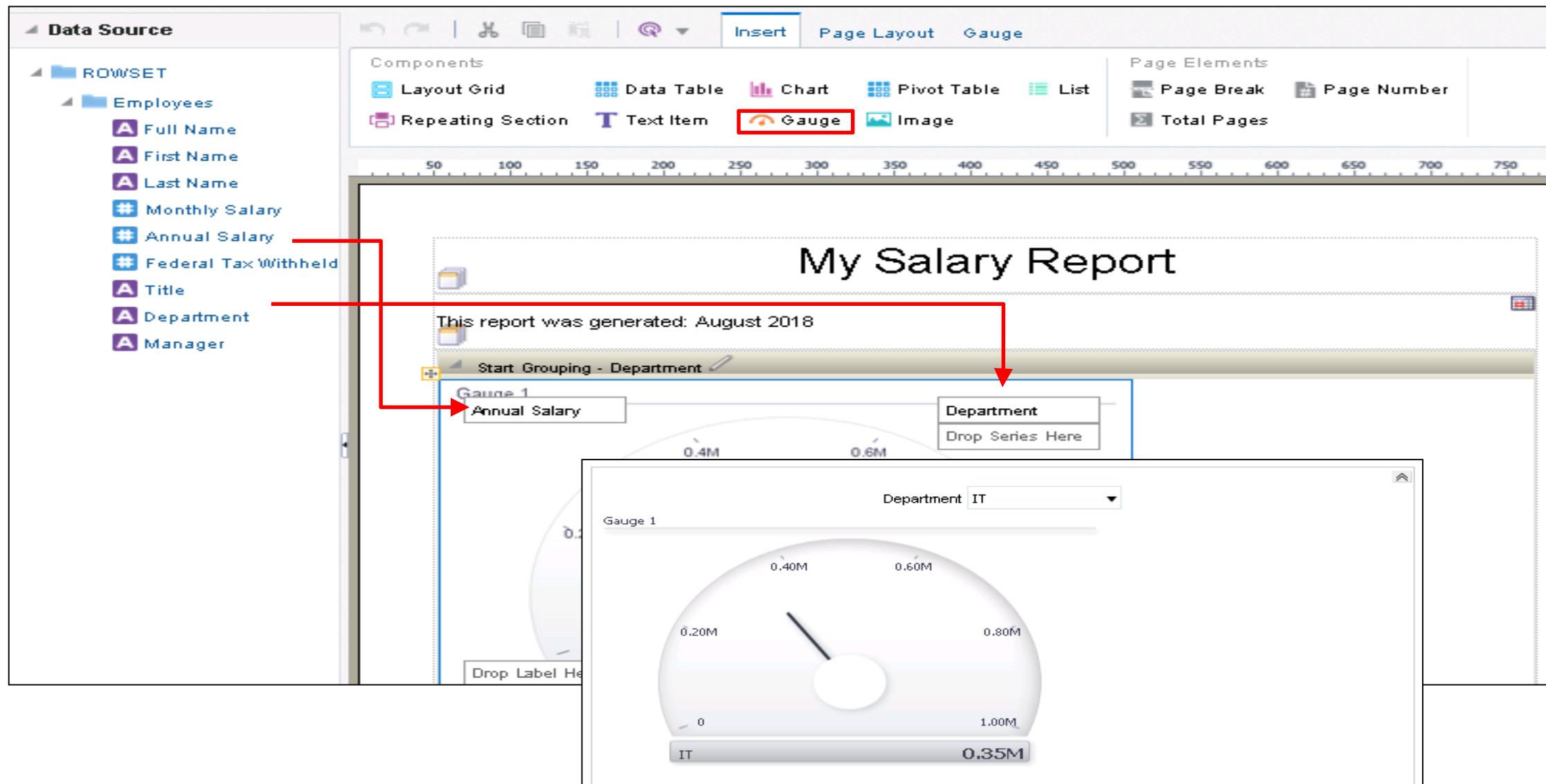
Data Source: The left sidebar lists the data source structure, including a ROWSET named Employees with fields: Full Name, First Name, Last Name, Monthly Salary, Annual Salary, Federal Tax Withheld, Title, Department, and Manager.

Components: The top navigation bar includes Insert, Page Layout, and Gauge buttons. The Components panel shows various options: Layout Grid, Data Table, Chart, Pivot Table, List, Repeating Section, Text Item, Gauge (which is highlighted with a red box), and Image.

Report Content: The main area displays the report structure:

- Section Header:** "My Salary Report"
- Text Item:** "This report was generated: August 2018"
- Grouping:** "Start Grouping - Department" (highlighted with a red box)
- Gauge:** A circular gauge titled "Gauge 1" for "Annual Salary". It has a scale from 0 to 1.00M with major ticks at 0.20M, 0.40M, 0.60M, 0.80M, and 1.00M. The needle points to "0.35M". A dropdown menu labeled "Department" is open, showing "IT" selected.

Annotations: Red arrows highlight the "Annual Salary" field in the Data Source tree, the "Gauge" component in the Components panel, and the "Gauge 1" section in the report content.



Working with Page Layout Features

The screenshot shows a software interface for working with page layout features. At the top, there is a ribbon with tabs: Data Source, Insert, Page Layout (which is selected and highlighted in blue), and Text. Below the ribbon, there are two main sections: "Orientation and Paper Size" and "Header/Footer Section".

Orientation and Paper Size: This section contains buttons for "Portrait" and "Landscape" orientation, and a dropdown menu currently set to "Letter".

Header/Footer Section: This section contains buttons for "Page Header" and "Page Footer" under the "Header/Footer" category, and "Report Header" and "Report Footer" under the "Header/Footer" category.

Page Layout Tab: A callout box highlights the "Page Layout" tab in the ribbon.

Header/Footer Section: A callout box highlights the "Header/Footer" section in the "Orientation and Paper Size" panel.

Data Source: On the left side, there is a sidebar with sections like Data Source, Components, Properties, Appearance, Data Formatting, and Misc. Under Misc, there is a "Display" section with a "Header Level" dropdown set to "None".

Table Data: A large table is displayed below the layout controls, showing data from the Northwind database. The columns are "Department", "Manager", "Full Name", and "Salary". The data includes:

Department	Manager	Full Name	Salary
Shipping	Steven King	Matthew Weiss	
Shipping	Steven King	Adam Fripp	8200
Shipping	Steven King	Payam Kaufling	7900
Shipping	Steven King	Shanta Vollman	6500
Shipping	Steven King	Kevin Mourgos	5800
Sales	Steven King	Gerald Cambrault	11000
Sales	Steven King	Eleni Zlotkey	10500
Sales	Steven King	John Russell	14000
Sales	Steven King	Karen Partners	13500
Sales	Steven King	Alberto Errazuriz	12000
			660400

Working with Page Layout Features

My Salary Report

This report was generated: August 2018

A report rendered in PDF format

Annual Salary

Department	Manager	Full Name	Monthly Salary
Accounting	Neena Kochhar	Shelley Higgins	12008
Accounting		William Gietz	8300
			20308

Header Section

Aug 3, 2018

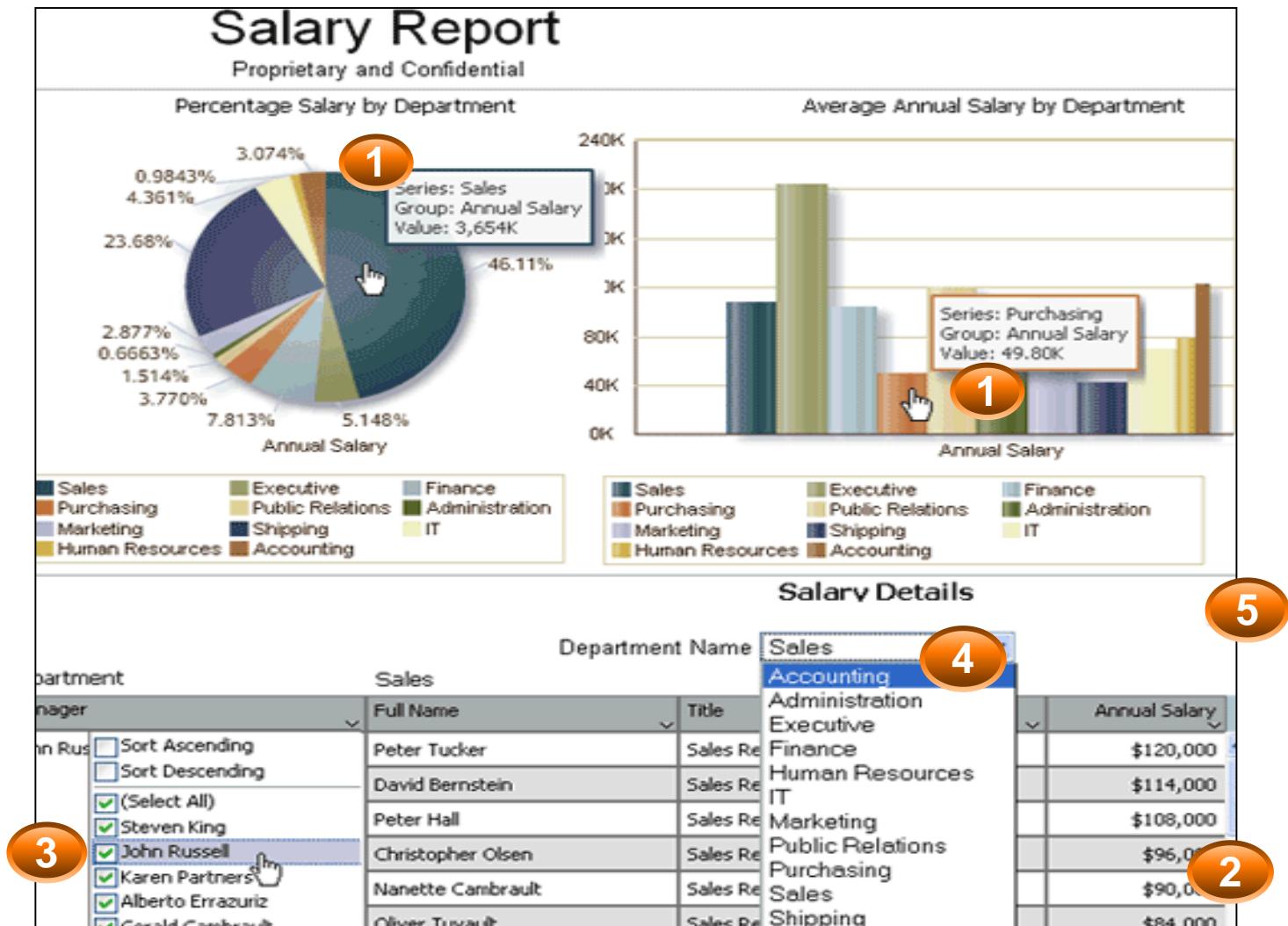
Administration
Marketing
Purchasing
Human Resources
Shipping
IT
Public Relations
Sales
Executive
Finance
Accounting

Footer Section

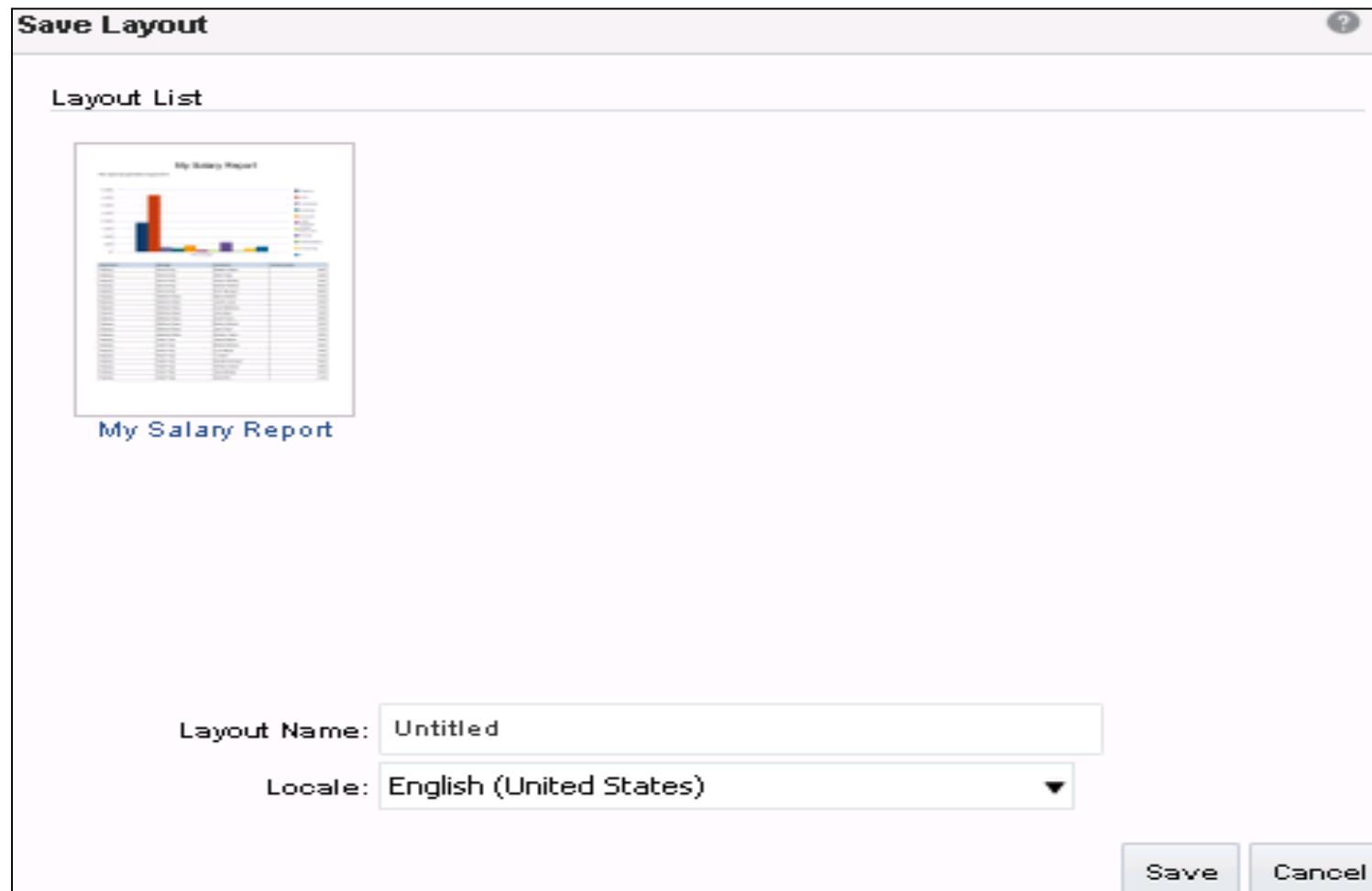
Page 1 Of 13

Working with Page Layout Features

1. Pop-up chart details
2. Scrollable tables
3. Table Columns filtering
4. Group Filtering
5. Collapsible Page elements



Saving a Layout



Practice 6-3: Overview

This practice covers working with the following:

- Repeating sections
- Page layout features

Advanced Features

- Working with pivot tables
- Creating boilerplates

Working with Pivot Tables

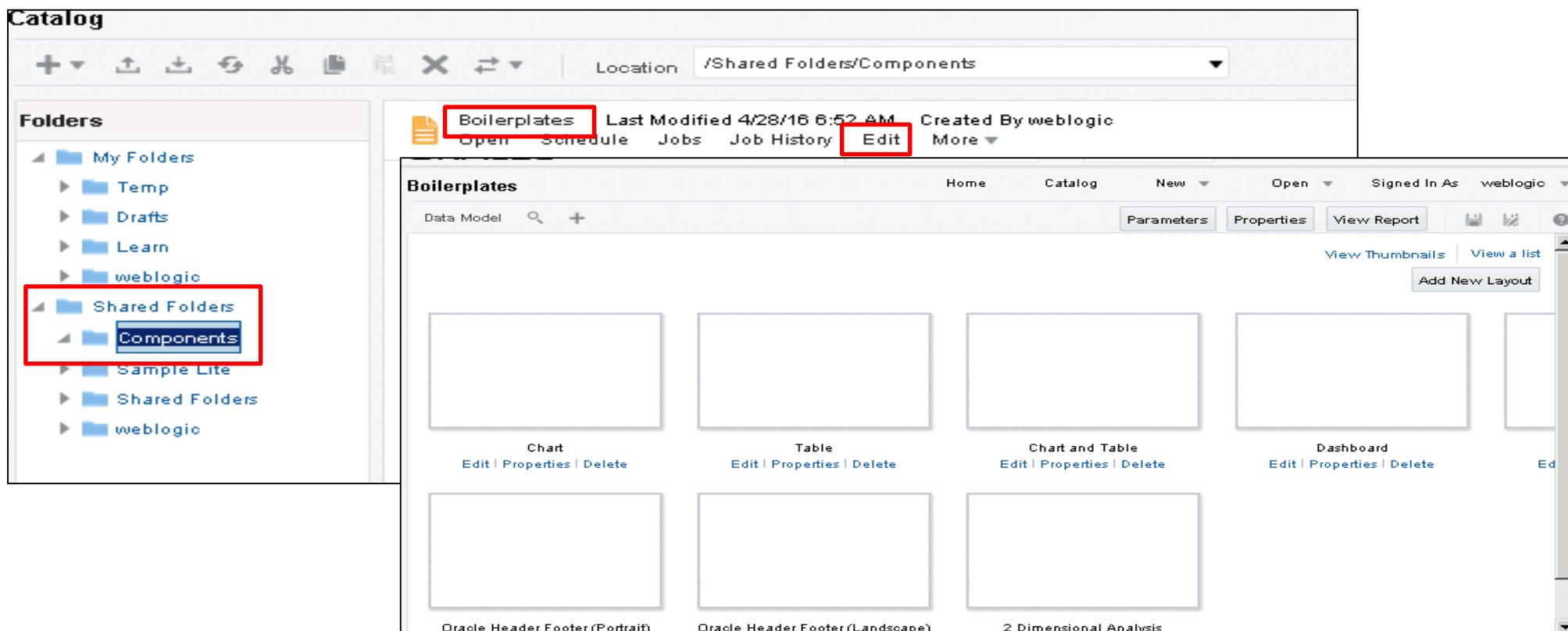
The screenshot illustrates the process of creating a pivot table in a report builder application. The interface is divided into several sections:

- Data Source:** On the left, a tree view shows the data source structure under **ROWSET**, specifically the **Employees** table, which includes fields like **Full Name**, **First Name**, **Last Name**, **Monthly Salary**, **Annual Salary**, **Federal Tax Withheld**, **Title**, **Department**, and **Manager**.
- Components:** A toolbar at the top right contains icons for **Layout Grid**, **Data Table**, **Chart**, **Pivot Table** (which is highlighted with a red box and circled with orange number 1), **Repeating Section**, **Text Item**, **Gauge**, and **Image**. The **Pivot Table** icon is the target of the first red arrow.
- Page Elements:** A panel on the right lists **Page Break**, **Page Number**, and **Total Pages**.
- Design Area:** The main workspace is divided into three columns: [Drop Columns Here], [Drop Rows Here], and [Drop Data Here]. A red box highlights the **Annual Salary** field from the data source, and a red arrow points from this field to the [Drop Data Here] area. Another red arrow points from the **Department** field to the [Drop Rows Here] area. A large orange circle labeled 2 is positioned near the bottom left of the workspace.
- Formatting Bar:** At the top of the workspace, there is a toolbar with **Select** (with **Select** and **Delete** dropdowns), **Font** (set to **Tahoma**), **Alignment**, **Conditional Formatting** (with **Highlight** checked), **Data Formatting** (set to **None**), and **Formula** (set to **Summation**).
- Pivot Table Data:** Below the toolbar, a preview of the pivot table is shown. The rows are grouped by department: **Shipping**, **Sales**, **Purchasing**, **Marketing**, **Executive**, **Public Relations**, **Human Resources**, and **Finance**. The columns represent employees: **Steven King**, **Neena Kochhar**, **Lex De Haan**, and **Alexander H**. The **Annual Salary** field is selected in the Sales row, highlighted with a blue border.
- Callout:** A purple callout box points to the selected cell in the pivot table, containing the text: "The pivot table appears with your selected content."

Creating Boilerplates: Predefined Layouts

You can add boilerplates to both:

- Shared Folders
- My Folders



Quiz: Overview

This quiz examines your knowledge of the concepts discussed in the lesson.

Quiz

The BI Publisher Layout template enables you to view dynamic HTML output and perform lightweight interaction with your report data from within a browser and to generate high-fidelity, pixel-perfect reports to PDF, RTF, MS Excel, MS PowerPoint, and static HTML.

- a. True
- b. False

Quiz

BI Publisher has two types of predefined templates: Basic and Advanced.

- a. True
- b. False

Quiz

Conditional formats allow you to highlight data fields based on ranges or thresholds.

- a. True
- b. False

Summary

In this lesson, you should have learned how to:

- Describe the Layout Editor tool and its interface
- Use Layout Editor to build report layouts
- Work with various layout components
- Save the layouts

Practices 6-4 and 6-5: Overview

These practices cover the following topics:

- Working with gauges and pivot tables
- Creating boilerplates

7. Using Template Builder to Create RTF Templates

Objectives

After completing this lesson, you should be able to:

- Describe the functions and features of Template Builder
- Describe how to install Template Builder
- Create RTF templates offline using sample XML data
- Connect online to BI Publisher Server to create and publish an RTF template
- Insert tables, forms, charts, and other components into RTF templates
- Understand the Basic and Form Field methods
- Work with advanced RTF template techniques
- Describe Template Builder for Excel

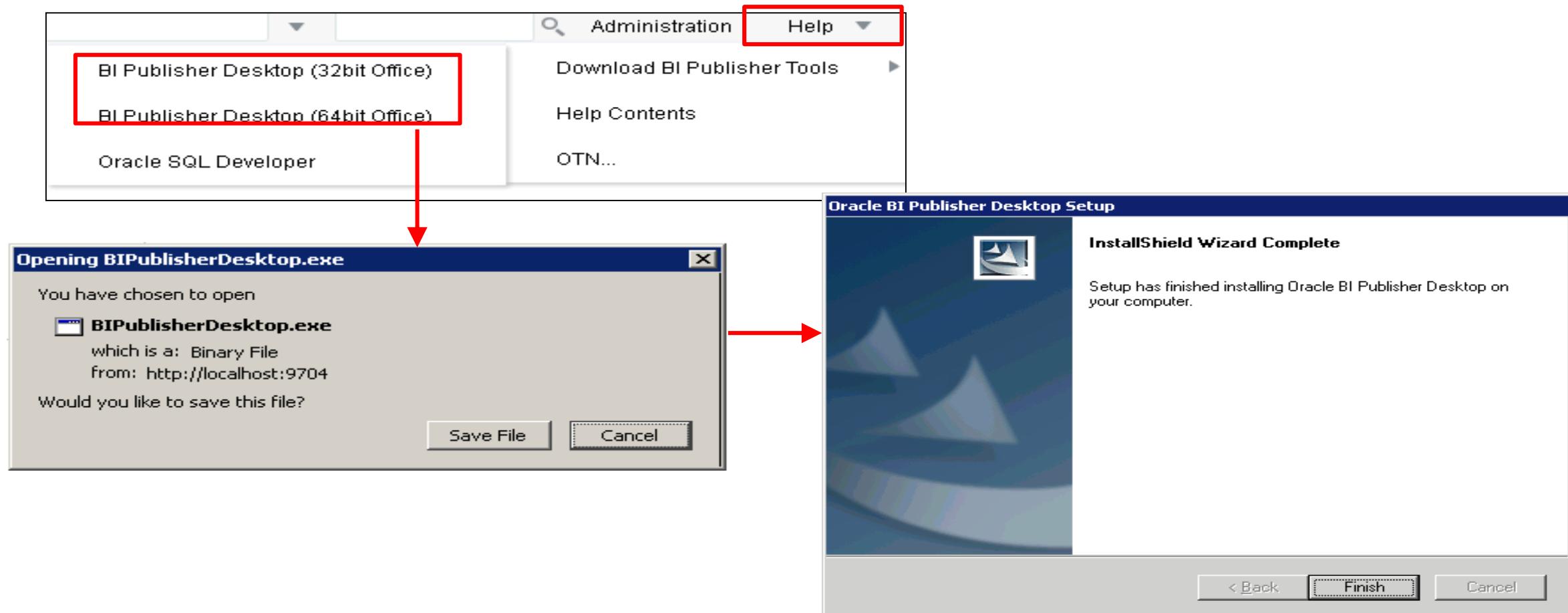
Template Builder: Introduction

Template Builder:

- Is a Microsoft Word add-in (for versions 2003 or later) that simplifies RTF template creation for BI Publisher reports
- Enables a template designer to perform the following tasks:
 - Log in to BI Publisher Server, browse catalog content, and create a new report or add a new layout to an existing report.
 - Design a layout using wizards to:
 - Insert data fields
 - Insert data-driven tables, forms, charts, and Pivot Tables
 - Browse, update, and validate the content of form fields
 - Extract boilerplate text into an XML Localization Interchange File Format (XLIFF) translation file and test translations
 - Preview outputs using sample data.

Installing Template Builder

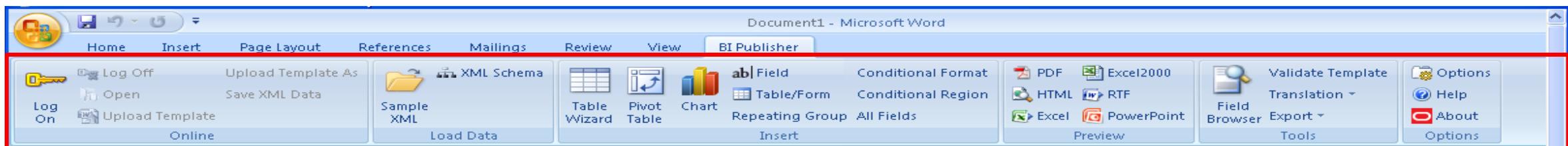
Template Builder is installed from within BI Publisher.



Exploring the Template Builder Interface

Template Builder consists of the BI Publisher menu bar, which has options and subordinate menus grouped into the following six menus:

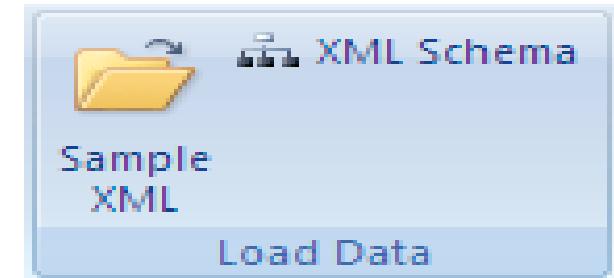
- Online
- Load Data
- Insert
- Preview
- Tools
- Options



BI Publisher Menus: Load Data

Use the Load Data menu to load:

- Sample XML data
- An XML schema



BI Publisher Menus: Insert

The Insert menu offers easy-to-use dialog boxes and wizards for inserting:

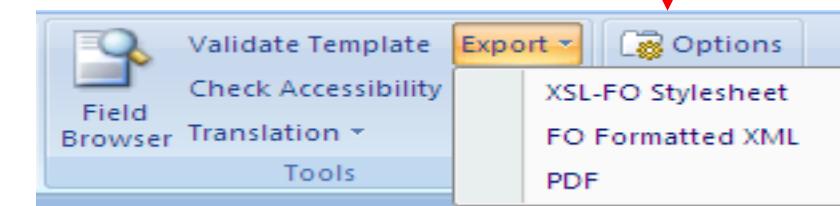
- Fields
- Charts
- Tables (via a wizard)
- Tables or forms
- Repeating groups
- Pivot tables
- Conditional formatting
- Conditional regions



BI Publisher Menus: Preview and Tools

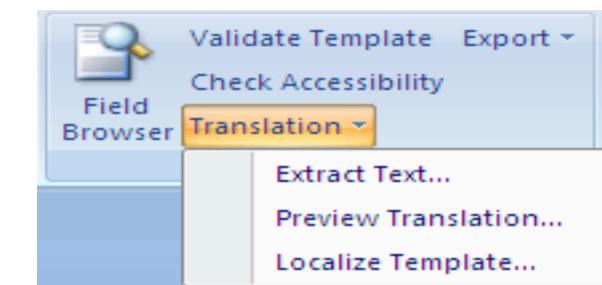
- Preview

- PDF
- HTML
- RTF
- PowerPoint
- Excel (MHTML)
- Excel2000

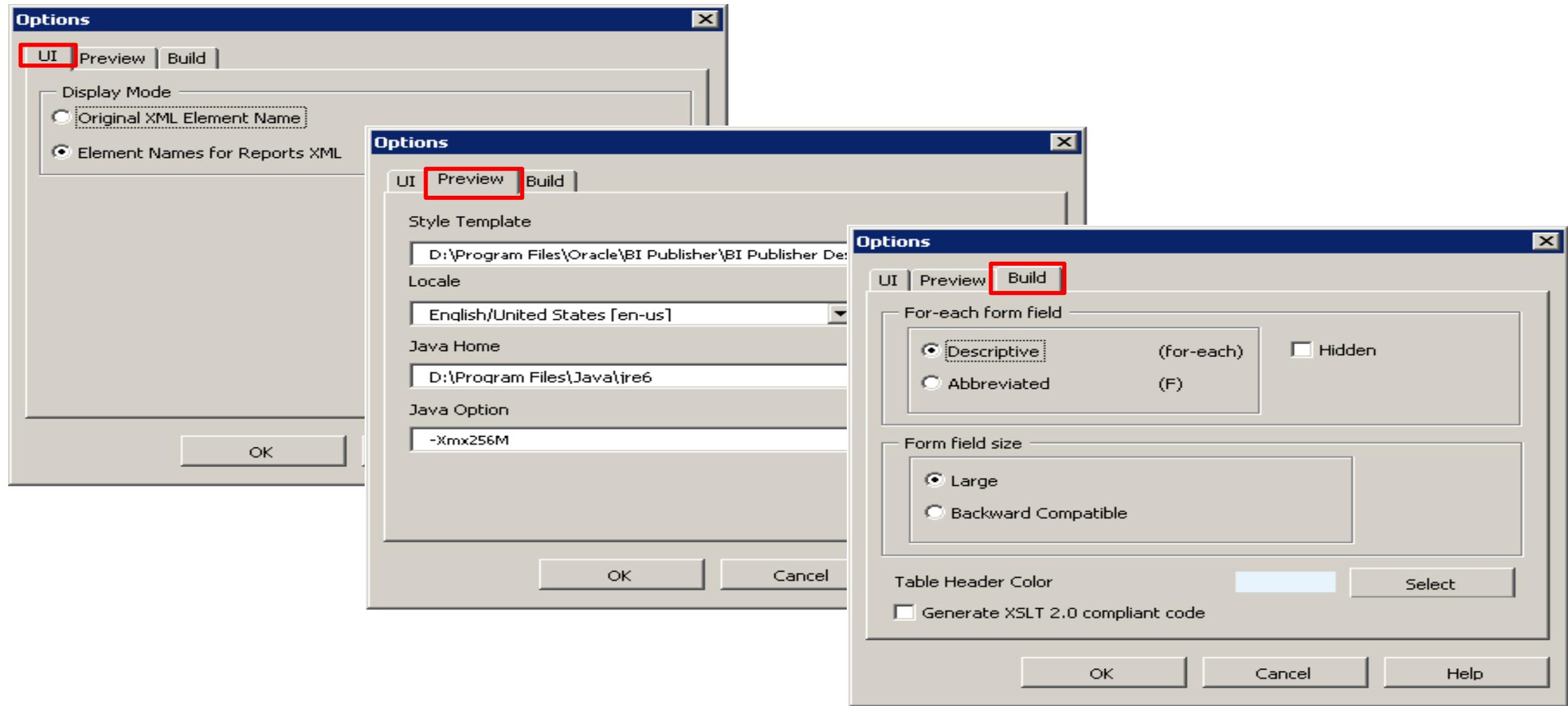


- Tools

- Field Browser
- Validate Template
- Check Accessibility
- Translation
- Export



BI Publisher Menus: Options



Explaining the Relationship Between RTF and XML

Sample Template Layout

ORACLE®
E-Business Suite

Payables Invoice Register

Supplier:

Invoice Num	Invoice Date	GL Date	Curr	Enter
Total for Supplier:				

Data fields such as Invoice Number and Supplier—most fields repeat

A sample XML file that is used as input to a Payables Invoice Register report template

Page 1 of 1
25 July 2003

Sample Payables Invoice Register

```
<?xml version="1.0" encoding="WINDOWS-1252" ?>
- <VENDOR REPORT>
- <LIST_G_VENDOR_NAME>
- <G_VENDOR_NAME>
<VENDOR_NAME>COMPANY A</VENDOR_NAME>
- <LIST_G_INVOICE_NUM>
- <G_INVOICE_NUM>
<SET_OF_BOOKS_ID>124</SET_OF_BOOKS_ID>
<GL_DATE>10-NOV-03</GL_DATE>
<INV_TYPE>Standard</INV_TYPE>
<INVOICE_NUM>031110</INVOICE_NUM>
<INVOICE_DATE>10-NOV-03</INVOICE_DATE>
<INVOICE_CURRENCY_CODE>EUR</INVOICE_CURRENCY_CODE>
<ENT_AMT>122</ENT_AMT>
<ACCTD_AMT>122</ACCTD_AMT>
<VAT_CODE>VAT22%</VAT_CODE>
</G_INVOICE_NUM>
</LIST_G_INVOICE_NUM> ←
<ENT_SUM_VENDOR>1000.00</ENT_SUM_VENDOR>
<ACCTD_SUM_VENDOR>1000.00</ACCTD_SUM_VENDOR> ←
</G_VENDOR_NAME>
</LIST_G_VENDOR_NAME>
<ACCTD_SUM REP>108763.68</ACCTD_SUM REP>
<ENT_SUM REP>122039</ENT_SUM REP> ←
</VENDOR REPORT>
```

Creating an RTF Template Using Sample XML Data

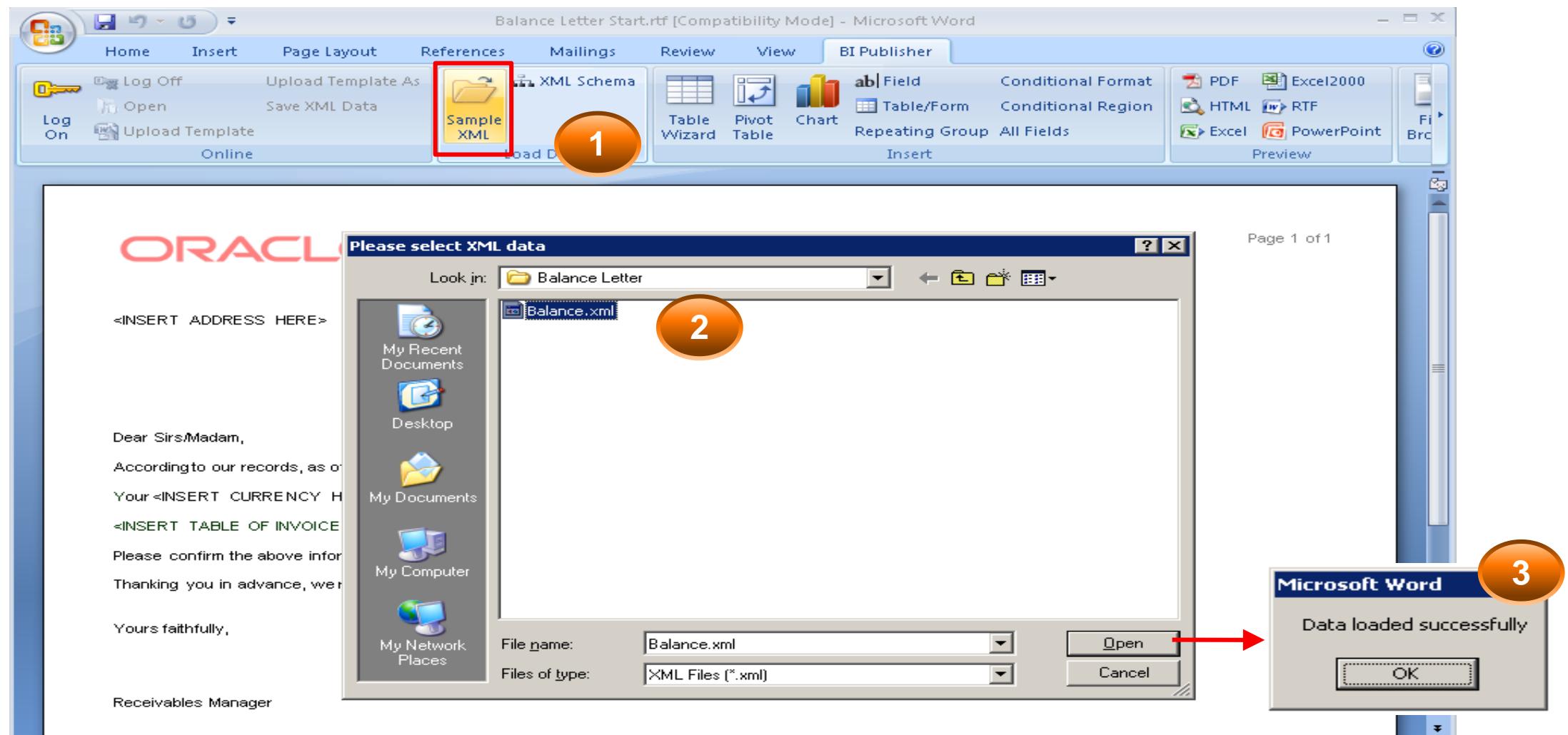
1. Create an RTF template file from a sample layout.
2. Load the sample XML data.
3. Insert fields.
4. Preview the data.
5. Insert a table.
6. View the results.

Step 1: Creating an RTF Template from a Sample Layout

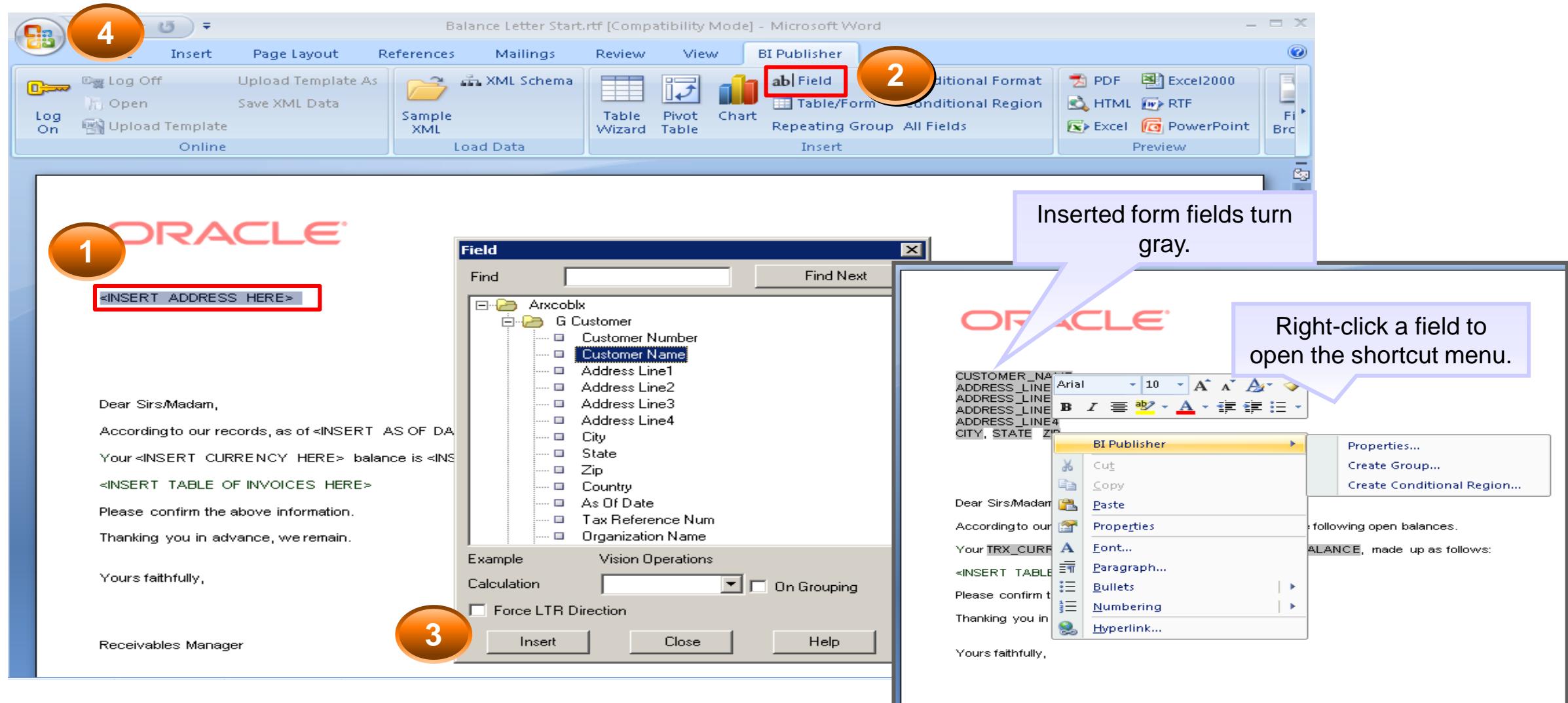
<p>ORACLE®</p> <p><INSERT ADDRESS HERE></p> <p>Dear Sirs/Madam,</p> <p>According to our records, as of <INSERT AS OF DATE HERE>, we show the following open balances.</p> <p>Your <INSERT CURRENCY HERE> balance is <INSERT CURRENCY BALANCE HERE>, made up as follows:</p> <p><INSERT TABLE OF INVOICES HERE></p> <p>Please confirm the above information.</p> <p>Thanking you in advance, we remain,</p> <p>Yours faithfully,</p> <p>Receivables Manager</p>	<p>Page 1 of 1</p>
---	--------------------

Private and Confidential

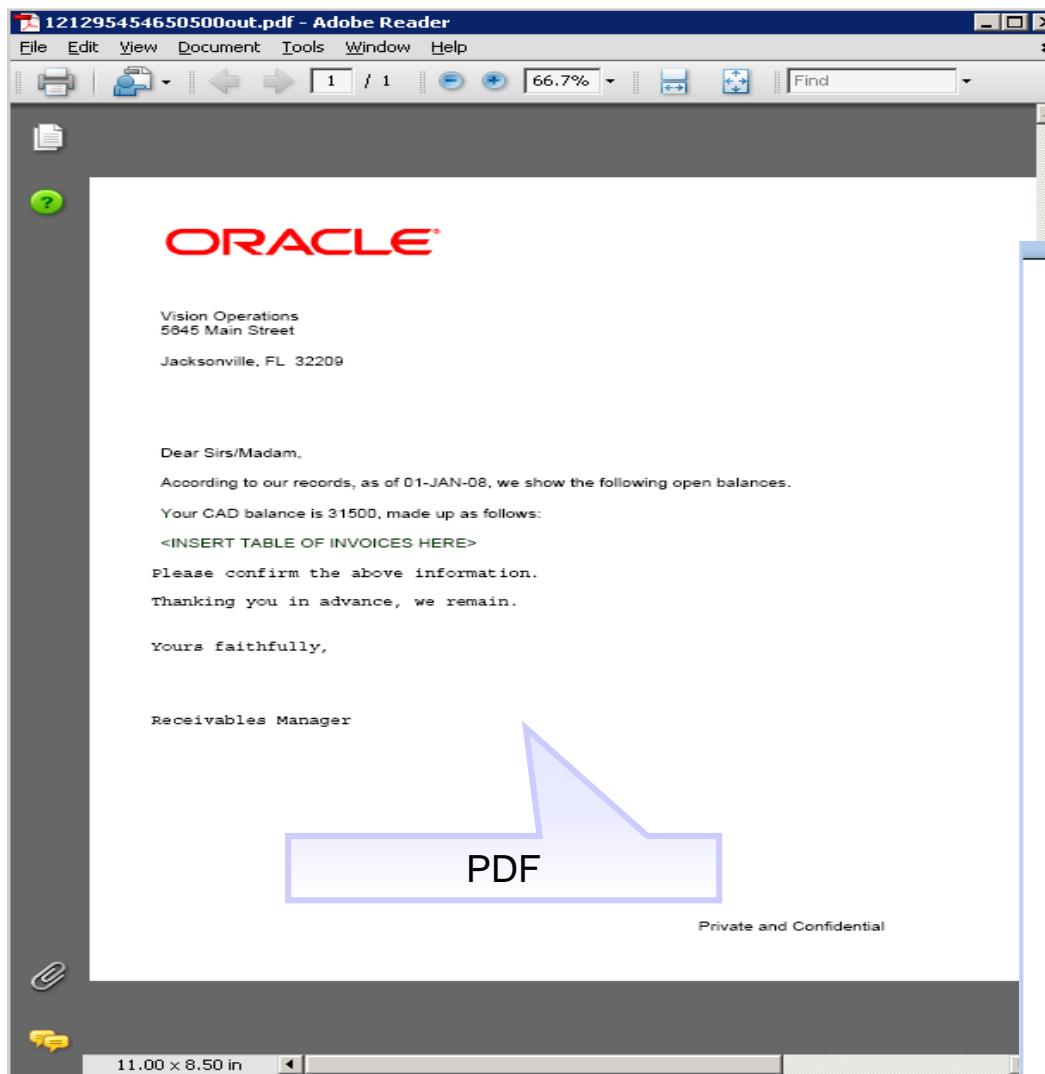
Step 2: Loading the Sample XML Data



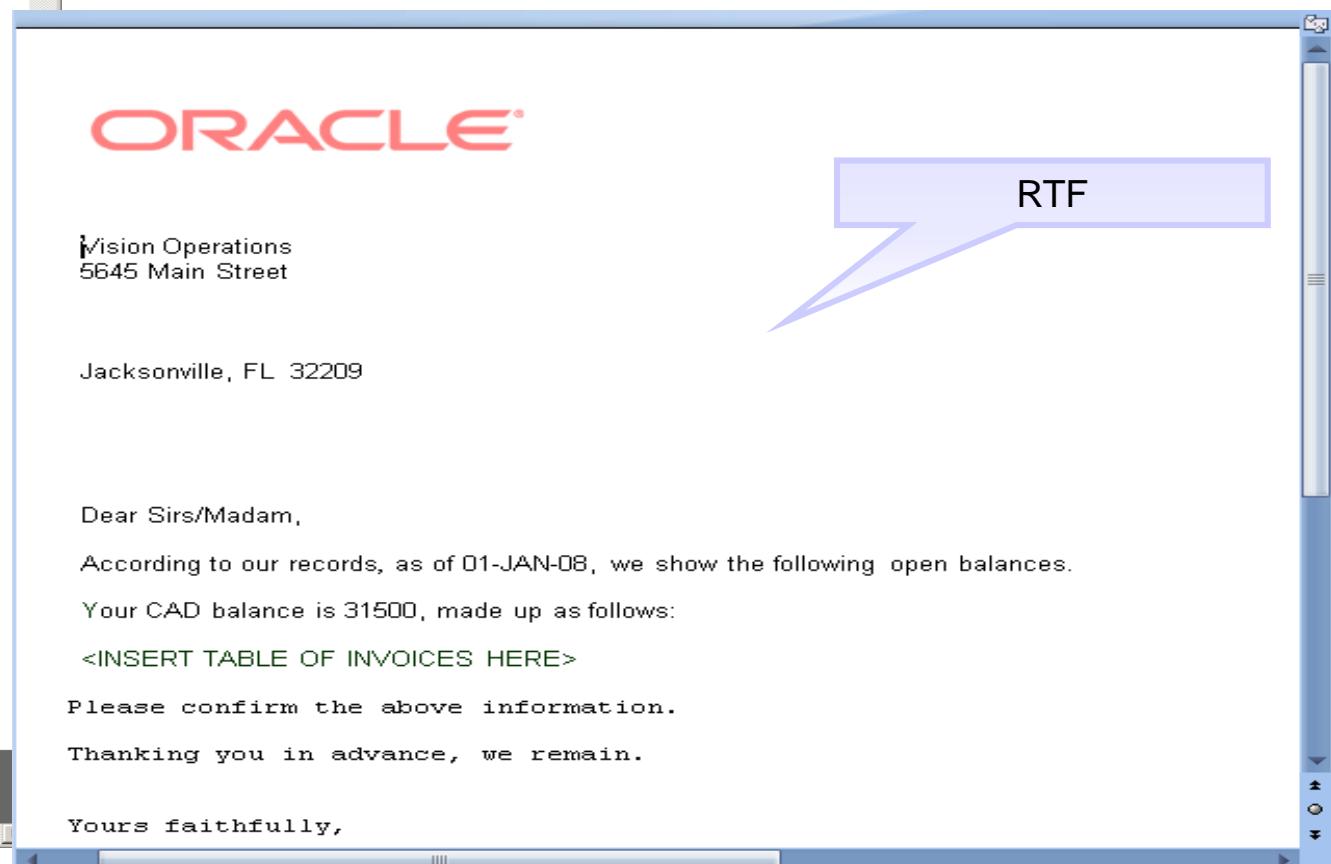
Step 3: Inserting Fields



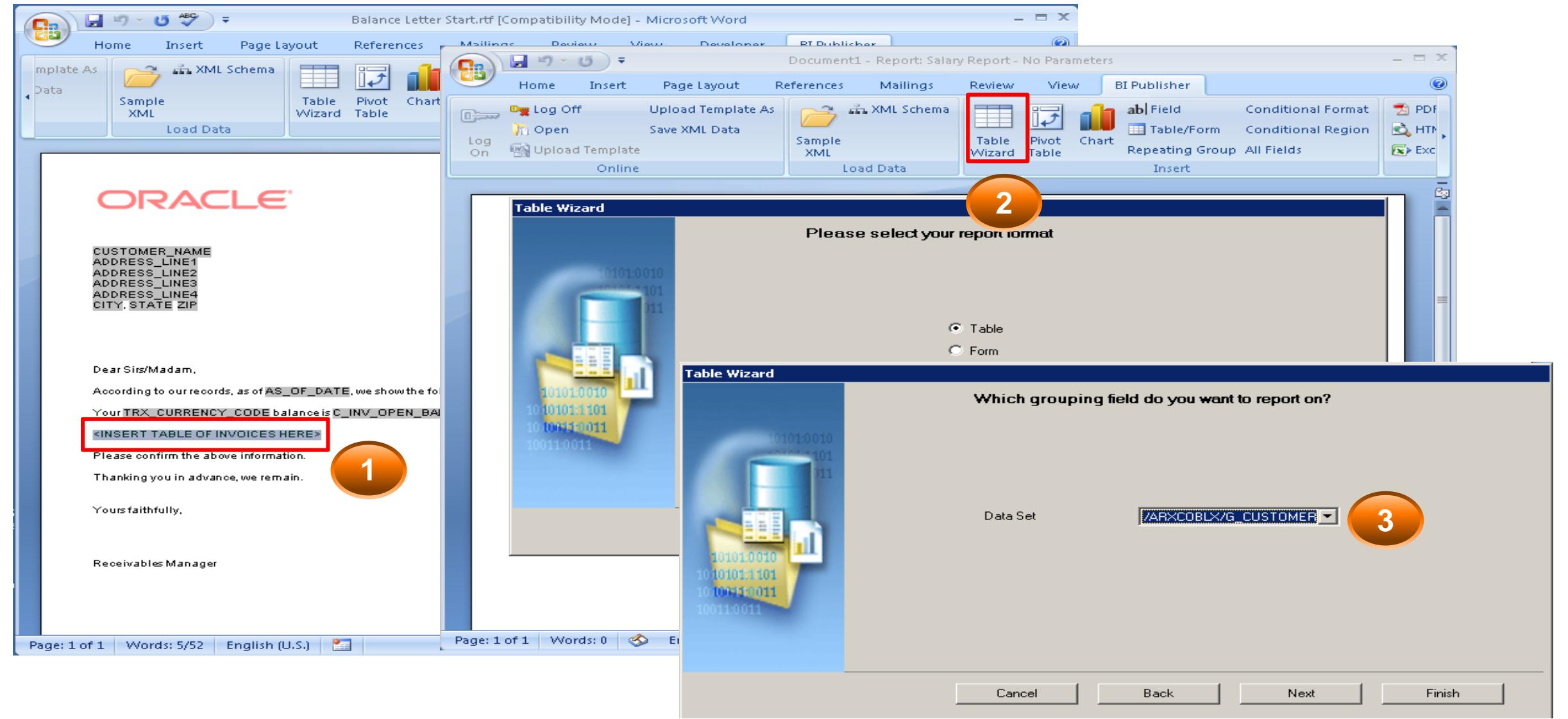
Step 4: Previewing Data



From the Preview menu, select a format to view data.



Step 5: Inserting a Table



Step 5: Inserting a Table

Table Wizard

Which fields do you want to show in your report?

The screenshot shows the 'Table Wizard' interface at Step 5. The main title is 'Which fields do you want to show in your report?'. On the left, there's a preview area with a database icon and transaction data. The right side has two lists of fields:

- Available Fields:** Trx Number, Trans Type, Transaction Date, Trans Amount, Trans Amount, Receipt Amount, Adjustment Amount.
- Selected Fields:** Trx Number, Trans Type, Transaction Date, Trans Amount, Trans Amount Remaining.

Between the lists are three buttons: a vertical scroll bar, a right-pointing arrow (>), and a double-right-pointing arrow (">>>). A blue callout labeled 'Shuttle Buttons' points to the scroll bar and arrows. A blue circle labeled '4' is positioned above the scroll bar.

How would you like to group your report?

Group By: Trans Type (selected), Group above.

Then: Trx Number, Trans Type, Transaction Date, Trans Amount, Trans Amount Remaining. The 'Trans Type' item is selected. Group above is selected for this level.

Then By: (empty dropdown).

Then By: (empty dropdown).

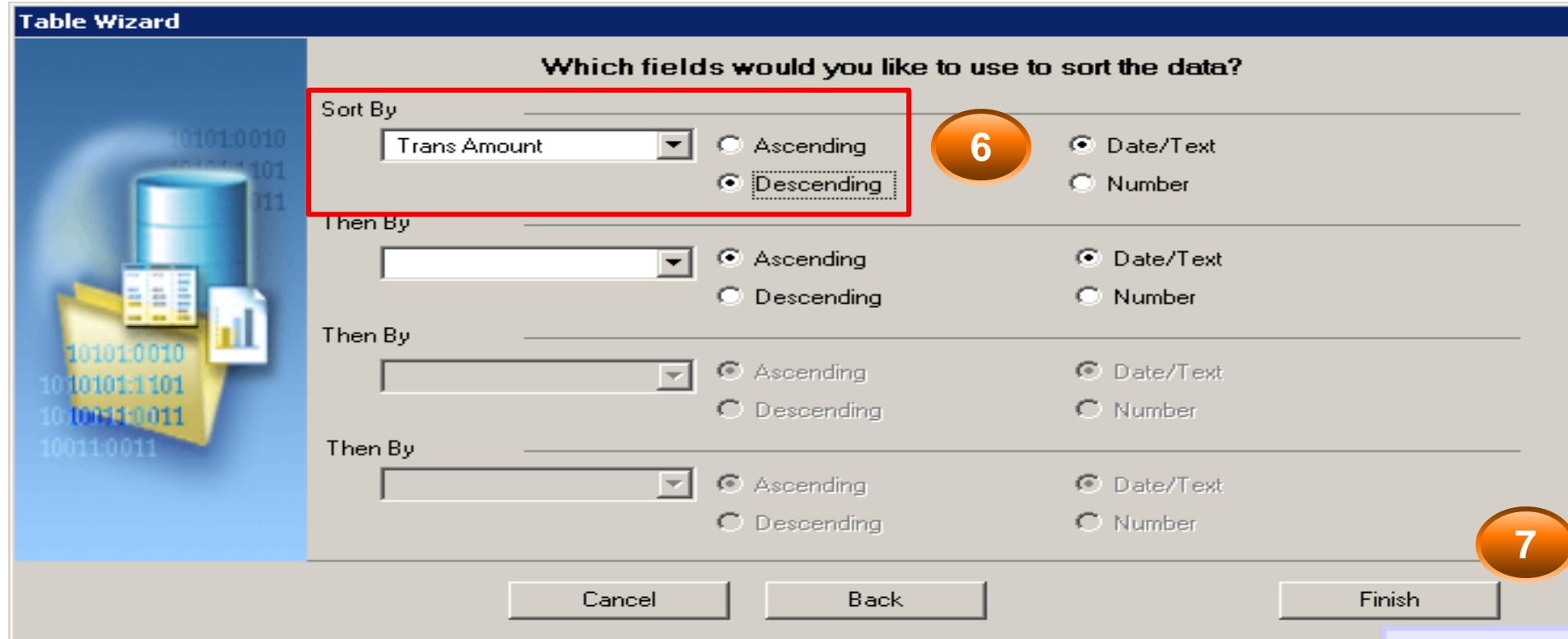
On the right, there are two sections for breaks:

- Data already sorted: Break: No Break
- Data already sorted: Break: No Break
- Data already sorted: Break: No Break

A blue callout labeled 'Reorder Buttons' points to the up and down arrows between the selected and available fields. A blue circle labeled '5' is positioned above the 'Then' section.

At the bottom are four buttons: Cancel, Back, Next, and Finish.

Step 5: Inserting a Table



```
group G_INVOICES by TRANS_TYPE
TRANS_TYPE
Trx Number      Transaction Date      Trans Amount      Trans Amount Remaining
F TRX_NUMBER    TRANSACTION_DATE     TRANS_AMOUNT     TRANS_AMOUNT_REMAINING E
end G_INVOICES by TRANS_TYPE
```

Step 6: Viewing the Results

The resulting table should look like this:

The screenshot shows an Oracle report with the following content:

ORACLE Page 1 of 2

CUSTOMER_NAME
ADDRESS_LINE1
ADDRESS_LINE2
ADDRESS_LINE3
ADDRESS_LINE4
CITY, STATE ZIP

Dear Sirs/Madam,

According to our records, as of AS_OF_DATE, we show the following open balances.

Your TRX_CURRENCY_CODE balance is C_INV_OPEN_BALANCE, made up as follows:

group G_INVOICES by TRANS_TYPE

TRANS_TYPE

Trx Number	Transaction Date	Trans Amount	Trans Amount Remaining
F TRX_NUMBER	TRANSACTION_DATE	TRANS_AMOUNT	TRANS_AMOUNT_REMAINING_E

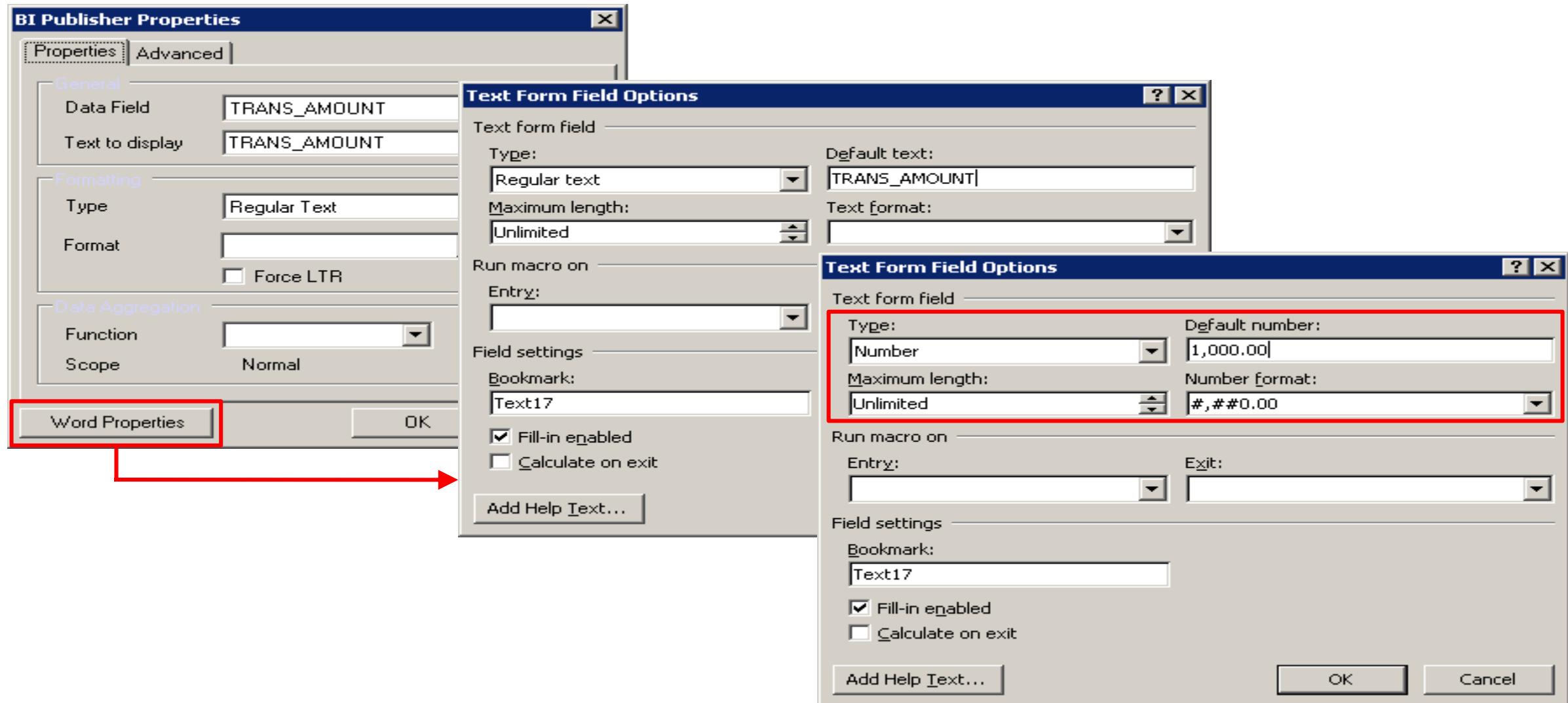
end G_INVOICES by TRANS_TYPE

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Changing Field Properties



Previewing the Table Data

The screenshot shows a PDF document titled "121299090409218out.pdf" viewed in Adobe Reader. The document is a letter from Oracle to a customer. It includes the Oracle logo, company address, and a table of transaction data. The table is labeled "Standard" and has columns for Trx Number, Transaction Date, Trans Amount, and Trans Amount Remaining.

Dear Sirs/Madam,

According to our records, as of 01-JAN-08, we show the following open balances.

Your CAD balance is 31500, made up as follows:

Standard	Trx Number	Transaction Date	Trans Amount	Trans Amount Remaining
	502394	22-NOV-07	11.250,00	11.250,00
	502532	20-DEC-07	11.250,00	11.250,00
	10020487	05-DEC-07	112.902,54	112.902,54
	10020552	12-DEC-07	112.902,54	112.902,54
	10020310	25-NOV-07	120.653,20	120.653,20
	502445	06-DEC-07	12.375,00	12.375,00
	10020280	24-NOV-07	128.654,96	128.654,96
	10019903	18-NOV-07	132.733,84	132.733,84
	10020402	04-DEC-07	146.776,07	146.776,07
	10020591	12-DEC-07	146.776,07	146.776,07
	10020319	26-NOV-07	147.328,21	147.328,21
	10020404	04-DEC-07	147.740,25	147.740,25
	10020520	09-DEC-07	147.740,25	147.740,25
	10020657	16-DEC-07	147.740,25	147.740,25
	10020622	15-DEC-07	155.449,04	155.449,04
	10020523	09-DEC-07	160.505,87	160.505,87
	10020658	16-DEC-07	160.505,87	160.505,87

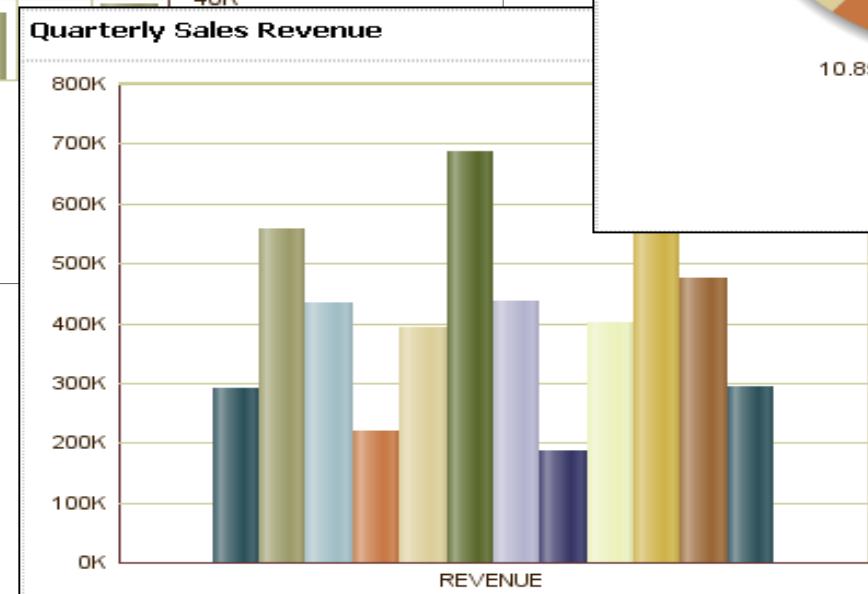
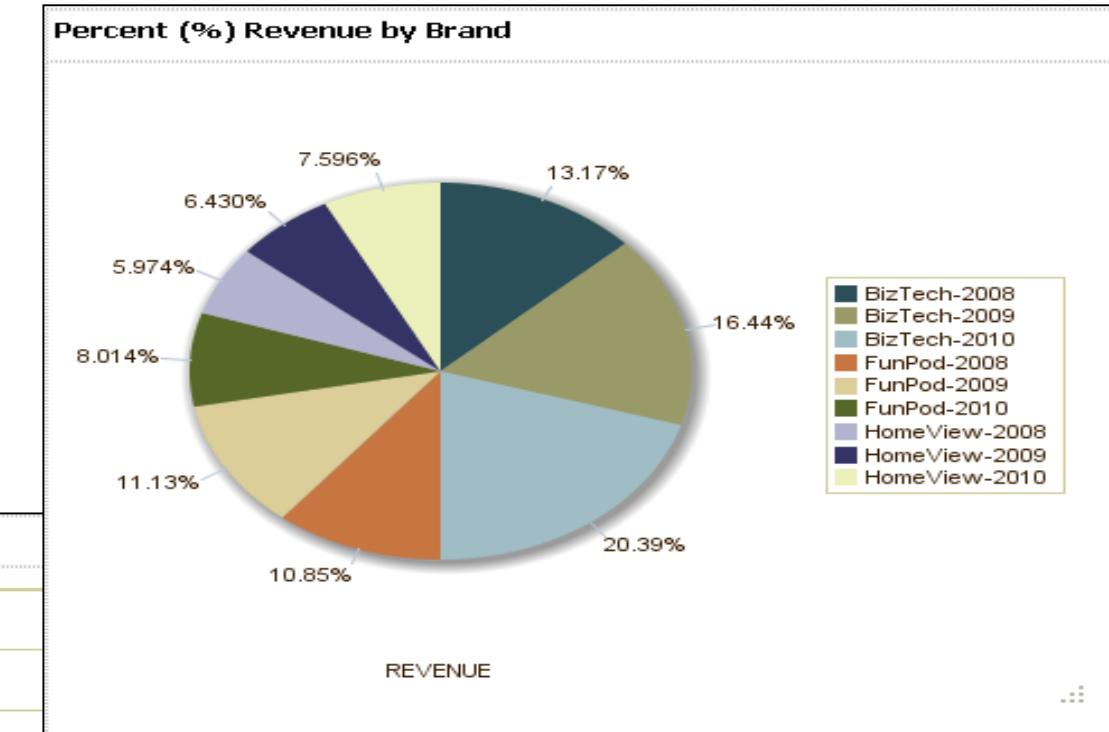
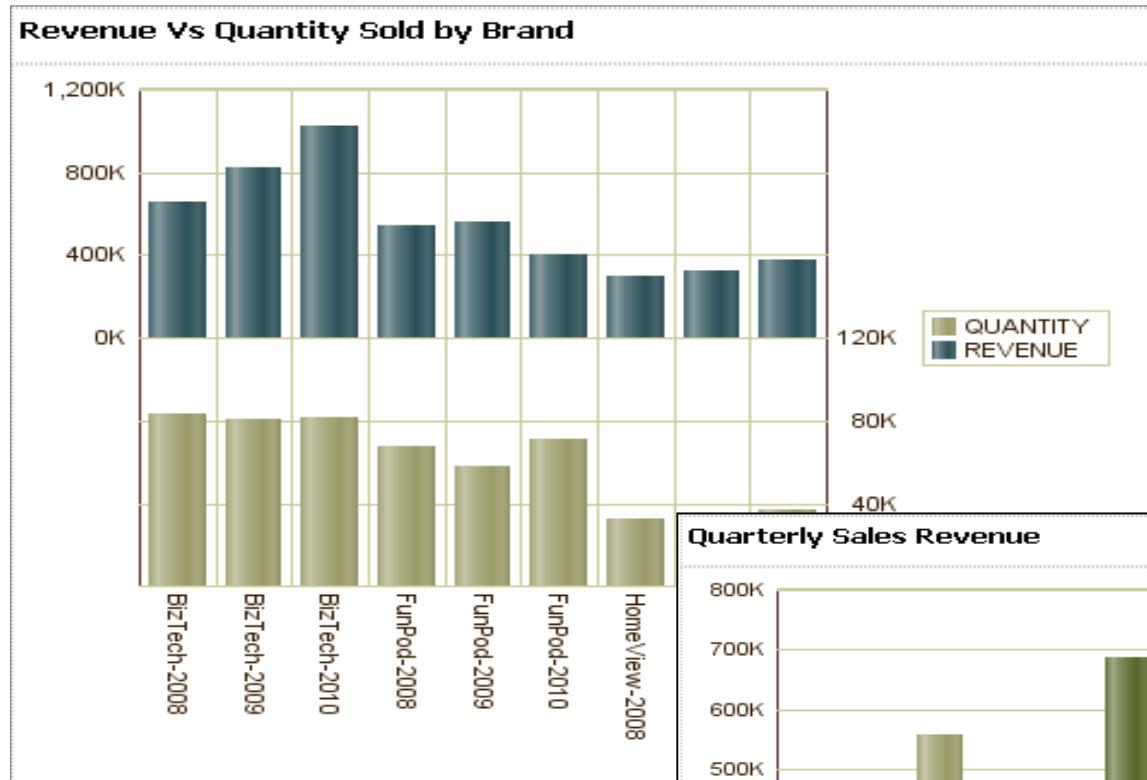
Private and Confidential

Practices 7-1: Overview

This practice covers the following:

- Building an RTF template from a sample file in disconnected mode
- Loading XML sample data for the template
- Adding a table of data by using the Table Wizard
- Previewing the report
- Changing field properties
- Saving the report

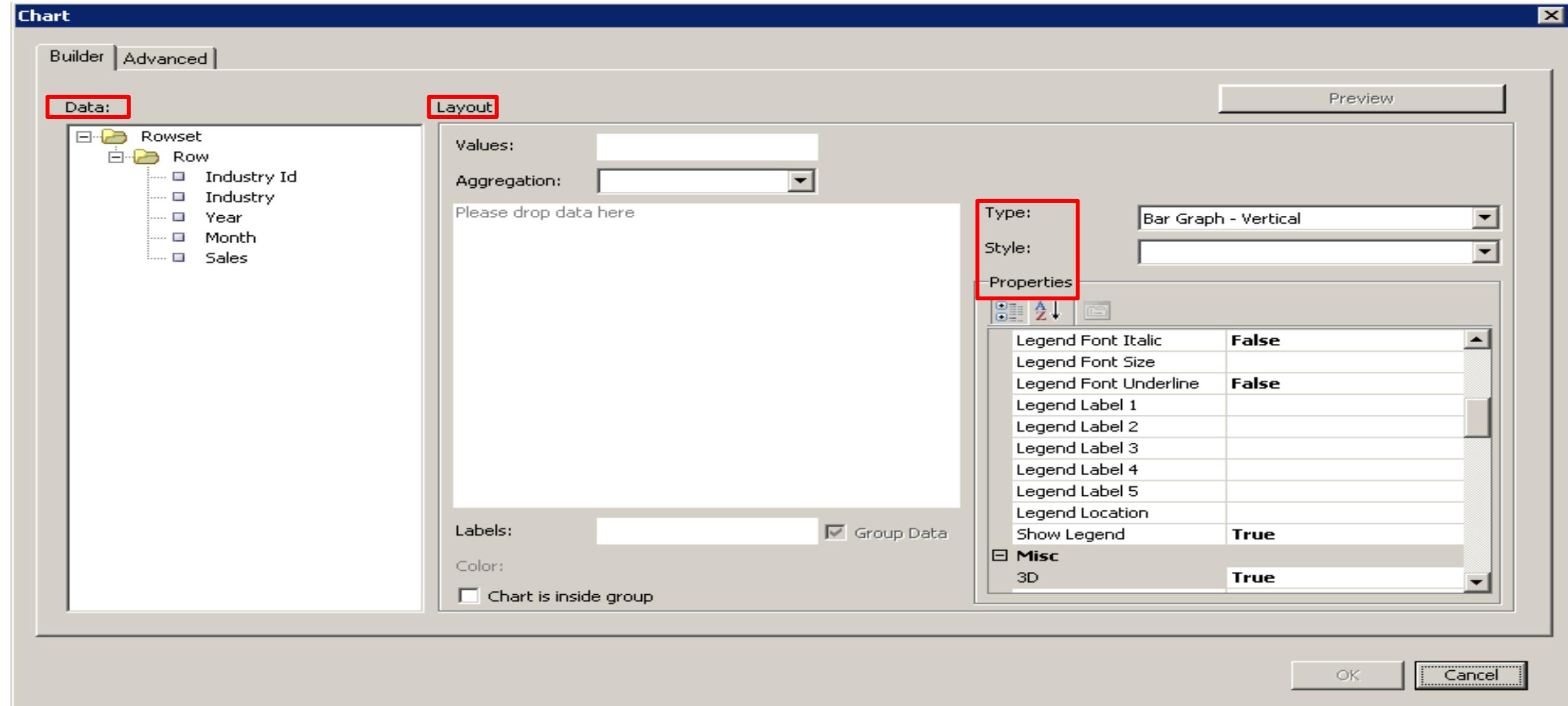
BI Publisher Charts



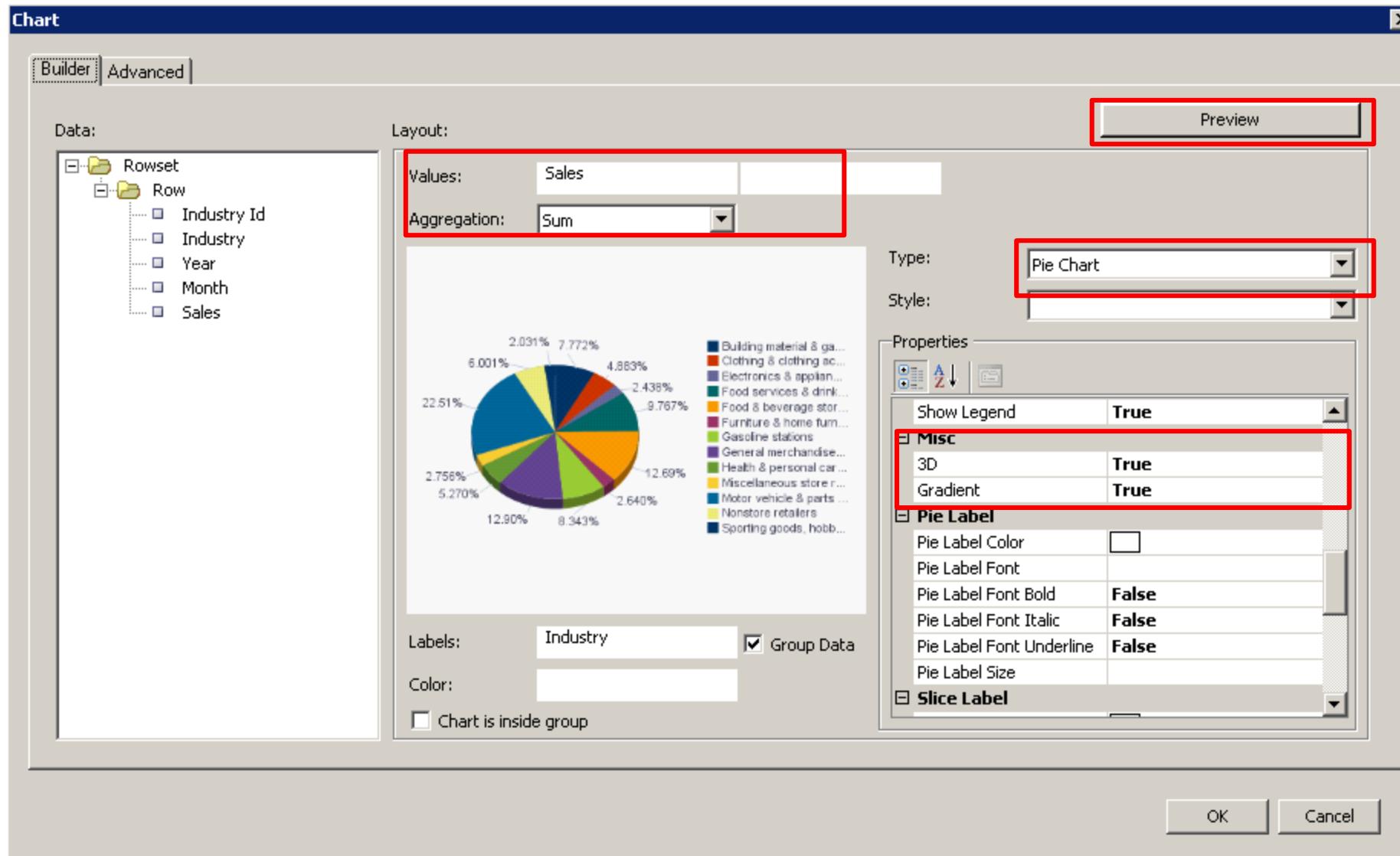
Adding a Chart to an RTF Template

1. Use Template Builder to insert a chart.
2. Define the chart.
3. Preview the chart.

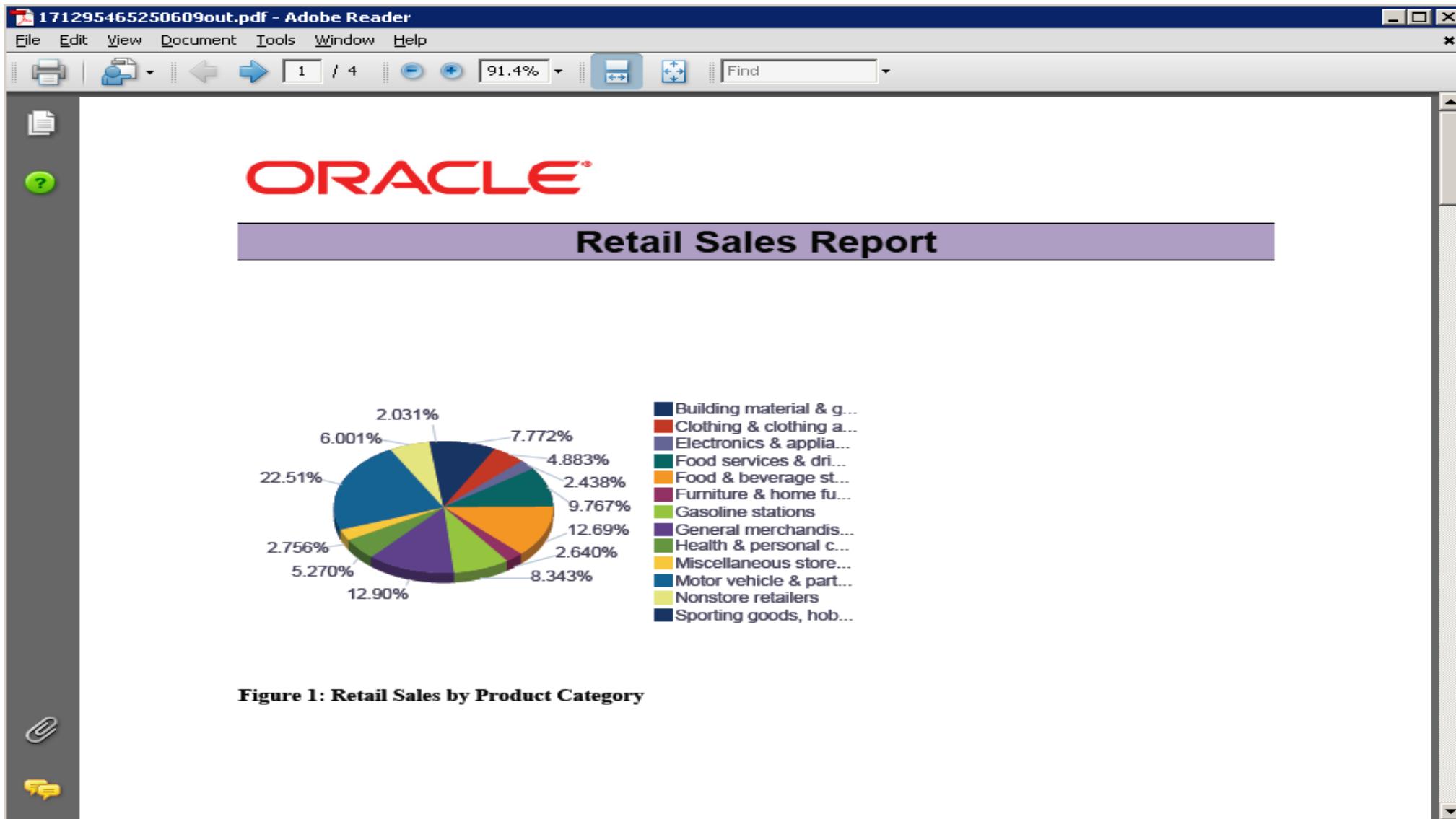
Step 1: Use Template Builder to Insert a Chart



Step 2: Define a Chart



Step 3: Preview the Chart



Examining Pivot Table Support in Template Builder



The screenshot shows the Microsoft Word ribbon with the BI Publisher tab selected. In the Insert ribbon group, the Pivot Table icon is highlighted with a red box and a red arrow pointing down to the Pivot Table dialog box.

Pivot Table

Data:

- DATA_DS
 - P_COMPANY
 - P_OFFICE
 - P_YEAR
- G_3
 - Company
 - Organization
 - Department
 - Office
 - Revenue
 - Target Revenue
 - Year
 - Product Brand
 - Product Type
 - Product Name

Layout:

Product Brand

Year	FunPod	BizTech
2009	21,878	42,81
	21,878	42,81

Preview

Properties Pane

Properties

- Misc**
 - Aggregation: Sum
 - Format: #,##0
 - Row Layout: Outline
- Sort**
 - Sort Column 1: Descending/Number
 - Sort Column 2:
 - Sort Column 3:
 - Sort Column 4:
 - Sort Row 1: Ascending/Number
 - Sort Row 2:
 - Sort Row 3:
 - Sort Row 4:
 - Sort Row 5:
- Total**

OK Cancel

Detailed description: This screenshot illustrates the integration of BI Publisher's pivot table functionality within Microsoft Word. It shows the BI Publisher ribbon tab and the Pivot Table dialog box. The dialog box displays a hierarchical data source tree on the left, a layout preview in the center, and properties settings on the right. A Properties pane is also visible on the right side of the dialog. The central preview area shows a simple pivot table structure with data for FunPod and BizTech products across two years.

Year	FunPod	BizTech
2009	21,878	42,81
	21,878	42,81

Examining Pivot Table Support in Template Builder: Results

The screenshot shows the Oracle BI Publisher interface with a completed pivot table template and its preview as PDF output.

A completed pivot table template: A callout points to a pivot table in the main workspace. The table has three columns: CH, G BRANDE, and Total. The rows show data for G PER_NAME_YEAR. The first row has values G 999E and 999E. The second row has values G 999E and 999.

CH	G BRANDE	Total
G PER_NAME_YEAR	G 999E	999E
	G 999E	999

A pivot table previewed as PDF output: A callout points to an Adobe Reader window displaying the generated PDF file. The PDF page shows the ORACLE logo and a table with five columns: FunPod, BizTech, HomeView, and Total. The table has two rows, both showing values 21,878, 42,814, 24,109, and 88,801 respectively.

	FunPod	BizTech	HomeView	Total
2009	21,878	42,814	24,109	88,801
	21,878	42,814	24,109	88,801

BI Publisher ribbon tabs: Home, Insert, Page Layout, References, Mailings, Review, View, BI Publisher, Design, Layout.

BI Publisher ribbon sub-tabs: Log Off, Open, Upload Template, XML Schema, Sample XML, Load Data, Table Wizard, Pivot Table, Chart, Field, Conditional Format, Table/Form, Conditional Region, Repeating Group, All Fields, Insert, PDF, Excel2000, HTML, RTF, Excel, PowerPoint, Field Browser, Validate Template, Translation, Export, Tools.

Page footer: Page: 3 of 3 | Words: 56 | English (U.S.)

Practice 7-2: Overview

This practice covers the following:

- Using Template Builder to insert a chart into the RTF template
- Defining the chart in the RTF template
- Previewing the chart
- Adding a pivot table to the RTF template
- Previewing the pivot table

Designing an RTF Template in Online Mode

1. Log in to BI Publisher in MS Word.
2. Open the BI Publisher report (to load the XML data).
3. Define an RTF template:
 - a. Add a table.
 - b. Add a chart.
4. Preview the data in the report by using the template.
5. Upload the RTF template to BI Publisher Enterprise Server, and view the data.

Step 1: Log On to BI Publisher



Step 2: Opening the BI Publisher Report

The screenshot illustrates the process of opening a BI Publisher report. It consists of two windows: an 'Open Template' dialog box at the top and a Microsoft Word document window below it.

Open Template Dialog:

- Left pane:** Shows a tree view of shared folders under 'Shared Folders'. The 'Published Reporting' folder is expanded, showing 'Analyses', 'Data Models', 'Reports', and 'Style Templates'.
- Right pane:** A table titled 'Reports' lists several BI Publisher reports:

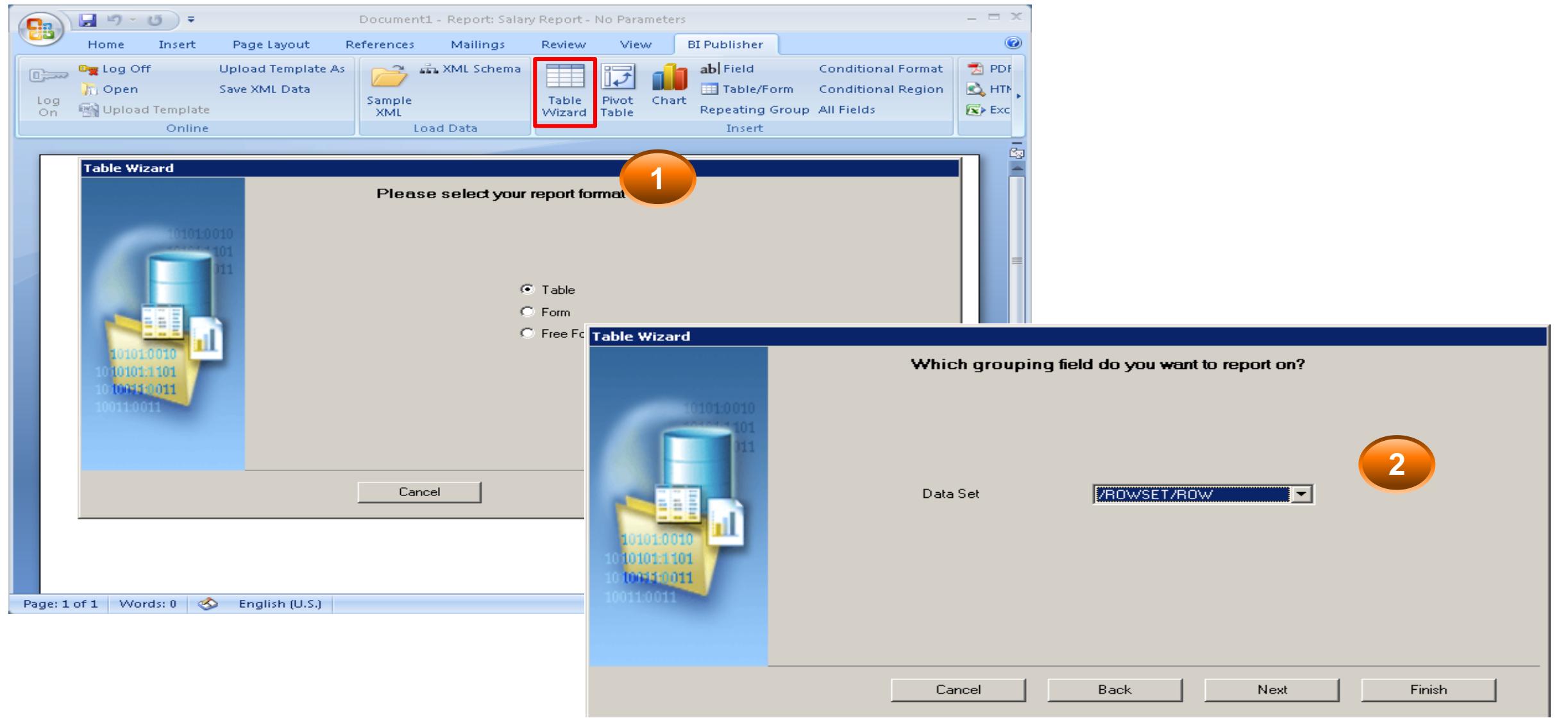
Name	Type	Modified
Balance Letter	BI Publisher Report	09/03/2010 10:54:18 ...
Brand Revenue Details	BI Publisher Report	09/03/2010 10:54:18 ...
Office Sales Report	BI Publisher Report	09/03/2010 10:54:18 ...
Product Listing	BI Publisher Report	09/03/2010 10:54:18 ...
Revenue Budget Actual a...	BI Publisher Report	09/03/2010 10:54:18 ...
Salary Report - No Param...	BI Publisher Report	09/03/2010 10:54:19 ...
Salary Report	BI Publisher Report	01/12/2011 5:32:56 PM
- Bottom Buttons:** 'Create Report', 'Open Report' (highlighted with a red box), 'Open Layout Template', and 'Cancel'.

Microsoft Word Document Window:

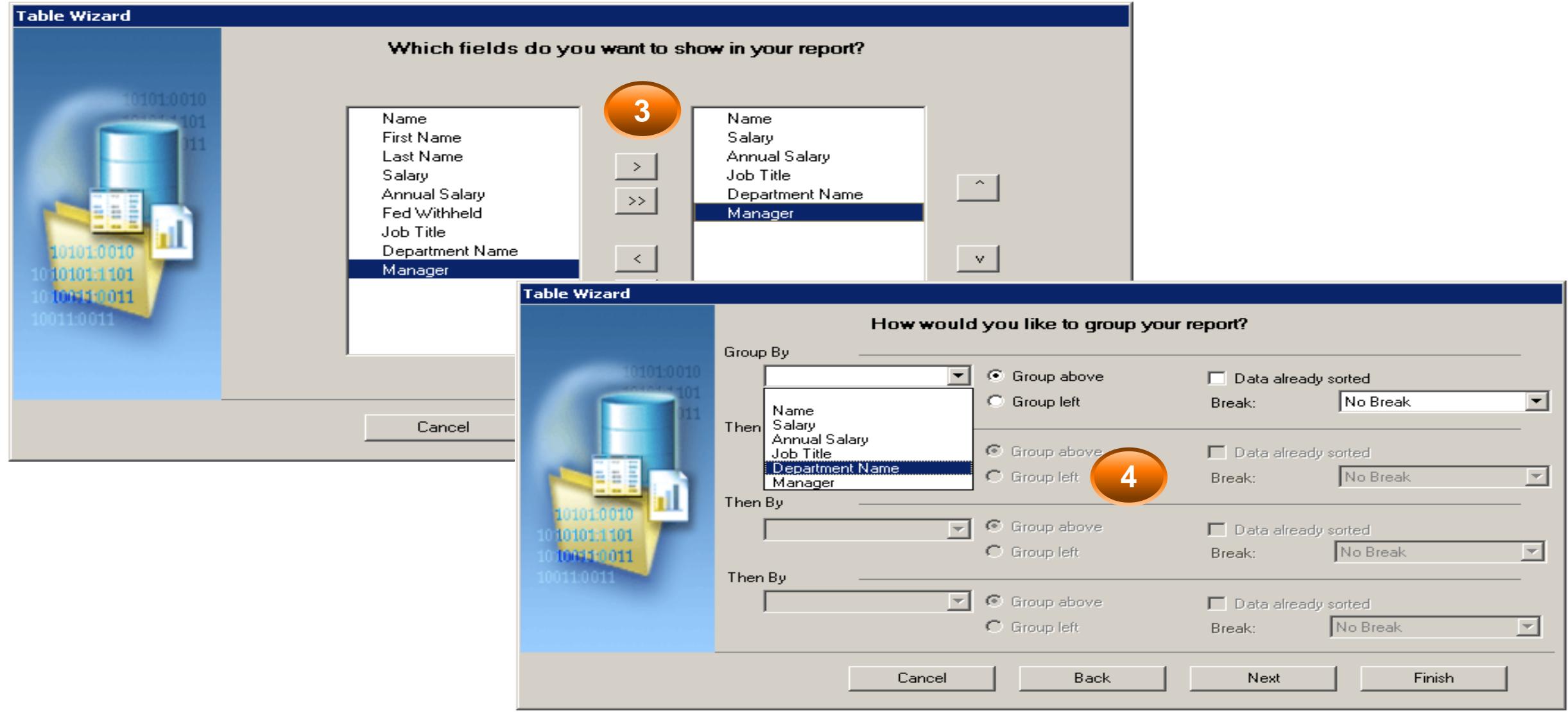
- Title Bar:** 'Document1 - Report: Salary Report - No Parameters'
- ribbon:** Shows the 'BI Publisher' tab selected.
- Home Tab Buttons:** Log Off, Open, Upload Template, Log On, Upload Template As, Save XML Data.
- Insert Tab Buttons:** XML Schema, Sample XML, Table Wizard, Pivot Table, Chart, Field, Table/Form, Repeating Group, All Fields, Conditional Format, Conditional Region, PDF, HTM, Excel.
- Load Data:** Load Data button.
- Insert:** Insert button.

A red arrow points from the 'Open Report' button in the dialog box down to the Microsoft Word window, indicating the next step in the process.

Step 3a: Defining the RTF Template: Add a Table



Step 3a: Defining the RTF Template: Add a Table



Step 3a: Defining the RTF Template: Add a Table

Table Wizard

Which fields would you like to use to sort the data?

Sort By: Annual Salary Ascending Descending

Then By: Ascending Descending

Then By: Ascending Descending

Then By: Ascending Descending

Date/Text
Number

Cancel Back Finish

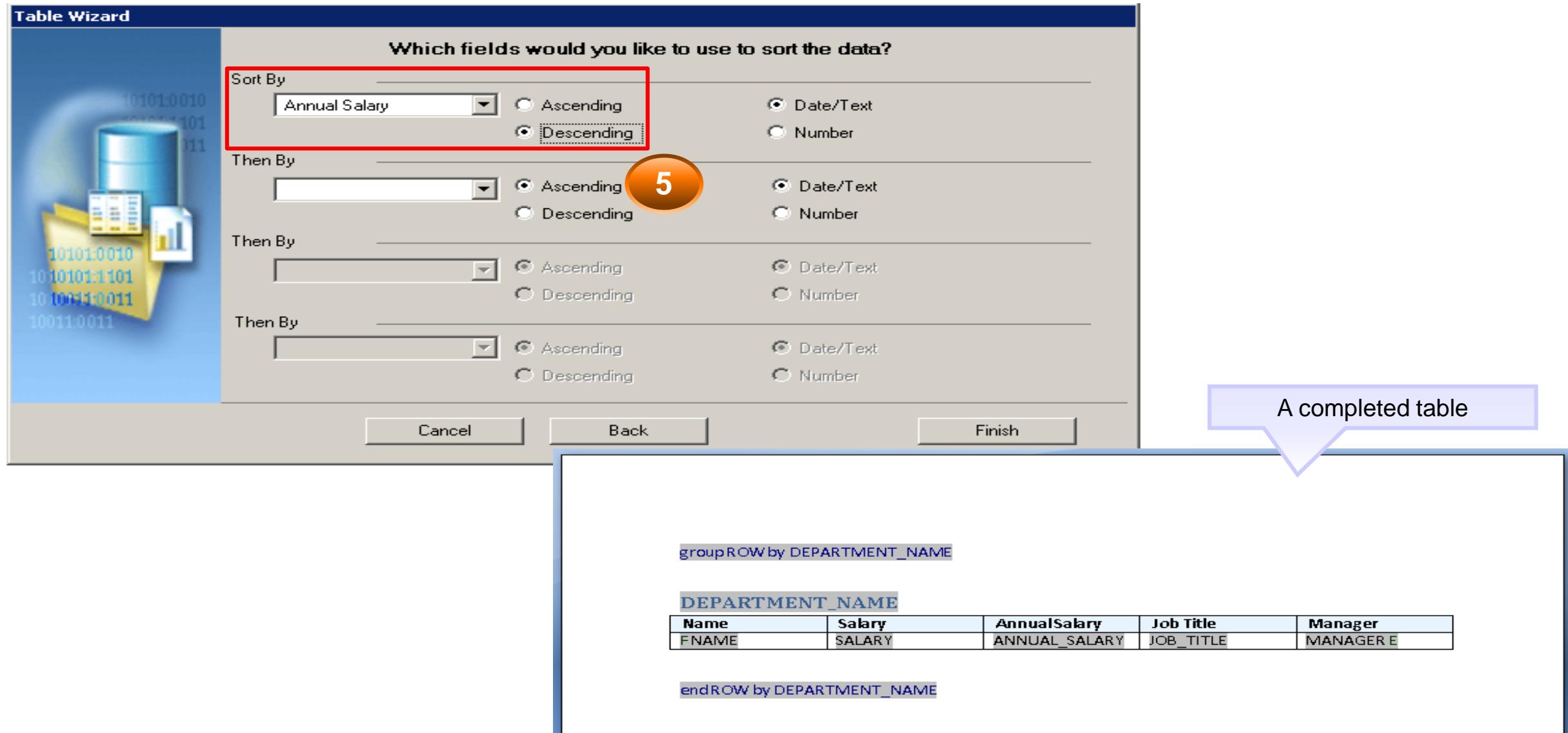
5

A completed table

group ROW by DEPARTMENT_NAME

Name	Salary	AnnualSalary	Job Title	Manager
FNAME	SALARY	ANNUAL_SALARY	JOB_TITLE	MANAGER_E

endROW by DEPARTMENT_NAME



Step 3b: Defining the RTF Template: Add a Chart

Screenshot of Microsoft Word showing the process of defining an RTF template with a chart.

The ribbon bar shows the following tabs: Home, Insert, Page Layout, References, Mailings, Review, View, and Publisher. The Publisher tab is selected, indicated by a red box around its icon.

The main content area displays an RTF template:

```
group ROW by DEPARTMENT_NAME
DEPARTMENT_NAME
Name Salary
F NAME SALARY
end ROW by DEPARTMENT_NAME
```

The status bar at the bottom shows: Page: 1 of 2, Words: 24, English (U.S.).

A "Chart" dialog box is open, showing the "Builder" tab. It contains the following settings:

- Data:** Rowset > Row > Name, First Name, Last Name, Salary, Annual Salary, Fed Withheld, Job Title, Department Name, Manager.
- Layout:**
 - Values: Salary
 - Aggregation: Average
 - Type: Pie Chart
 - Style: (empty)
- Properties:**
 - Legend Font Italic: False
 - Legend Font Size: (empty)
 - Legend Font Underline: False
 - Legend Label 1: (empty)
 - Legend Label 2: (empty)
 - Legend Label 3: (empty)
 - Legend Label 4: (empty)
 - Legend Label 5: (empty)
 - Legend Location: (empty)
 - Show Legend: True
 - Misc: 3D: True

The chart itself is a pie chart showing the distribution of salaries across different departments. The legend lists the departments and their corresponding percentages:

Department	Percentage
Accounting	11.47%
Administration	4.972%
Executive	19.2...
Finance	9.718%
Human Resources	7.345%
IT	10.74%
Marketing	6.509%
Public Relations	11.3...
Purchasing	4.690%
Sales	10.12%
Shipping	3.928%

Step 4: Previewing the Data by Using the Template

101295556973453out.pdf - Adobe Reader

File Edit View Document Tools Window Help

1 / 5 75% Find

ORACLE®

Accounting

Name	Salary	Annual Salary	Job Title	Manager
William Gietz	8300	99600	Public Accountant	Shelley Higgins
Shelley Higgins	12000	144000	Accounting Manager	Neena Kochhar

Administration

Name	Salary	Annual Salary	Job Title	Manager
Jennifer Whalen	4400	52800	Administration Assistant	Neena Kochhar

Executive

Name	Salary	Annual Salary	Job Title	Manager
Neena Kochhar	17000	204000	Administration Vice President	Steven King
Lex De Haan	17000	204000	Administration Vice President	Steven King

Name	Salary	Annual Salary	Job Title	Manager
Martha Sullivan	2500	30000	Shipping Clerk	Matthew Weiss
Randall Perkins	2500	30000	Shipping Clerk	Pavam Kaufling
James Landry	2400	28800	Stock Clerk	Matthew Weiss
Ki Gee	2400	28800	Stock Clerk	Pavam Kaufling
Steven Markle	2200	26400	Stock Clerk	Matthew Weiss
Hazel Philtanker	2200	26400	Stock Clerk	Pavam Kaufling
TJ Olson	2100	25200	Stock Clerk	Adam Prupp

A pie chart illustrating the distribution of employees across various departments. The segments are labeled with their respective percentages:

- Accounting: 11.47%
- Administration: 4.97%
- Executive: 19.21%
- Finance: 10.74%
- Human Resources: 6.50%
- IT: 10.12%
- Marketing: 4.69%
- Public Relations: 3.93%
- Purchasing: 7.35%
- Sales: 0.71%
- Shipping: 11.33%

Private and Confidential

Step 5: Uploading the Template and Viewing Layout

Screenshot of Microsoft Word showing the process of uploading a report template.

The ribbon tabs visible are Home, Insert, Page Layout, References, Mailings, Review, View, and BI Publisher. The BI Publisher tab is selected.

The "Upload Template As" button in the Quick Access Toolbar is highlighted with a red box.

A context menu is open, showing options like PDF, Excel, HTML, RTF, and Preview.

The main content area displays a report layout with a table and a pie chart.

An "Upload as new" dialog box is displayed over the report:

- Template Name: SimpleRTF
- Locale: English/United States
- Buttons: OK (highlighted with a red arrow) and Cancel

A Microsoft Word message box indicates: "The template SimpleRTF was added to the report Salary Report".

Page navigation: Page: 1 of 2 | Words: 24 | English (U.S.)

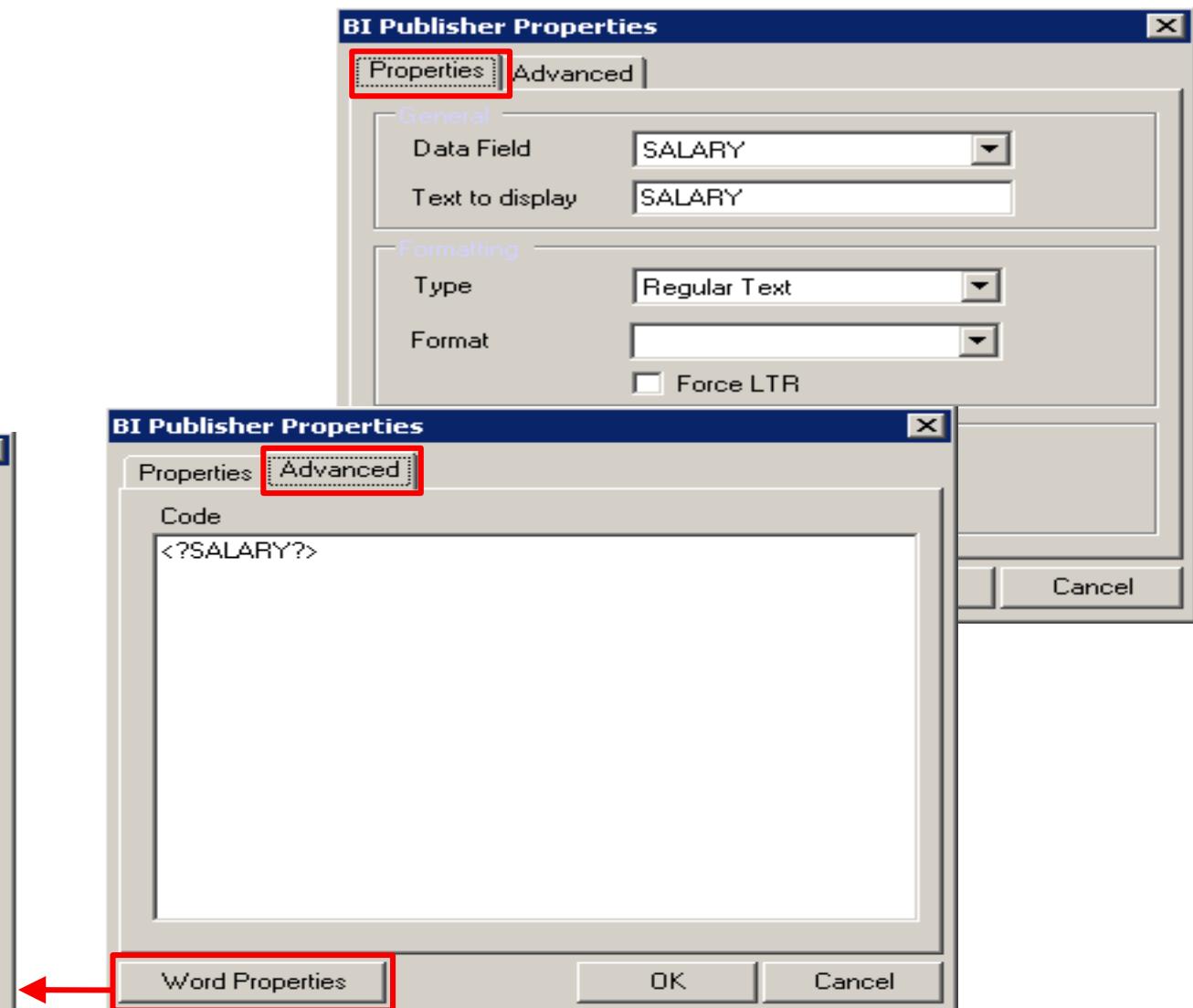
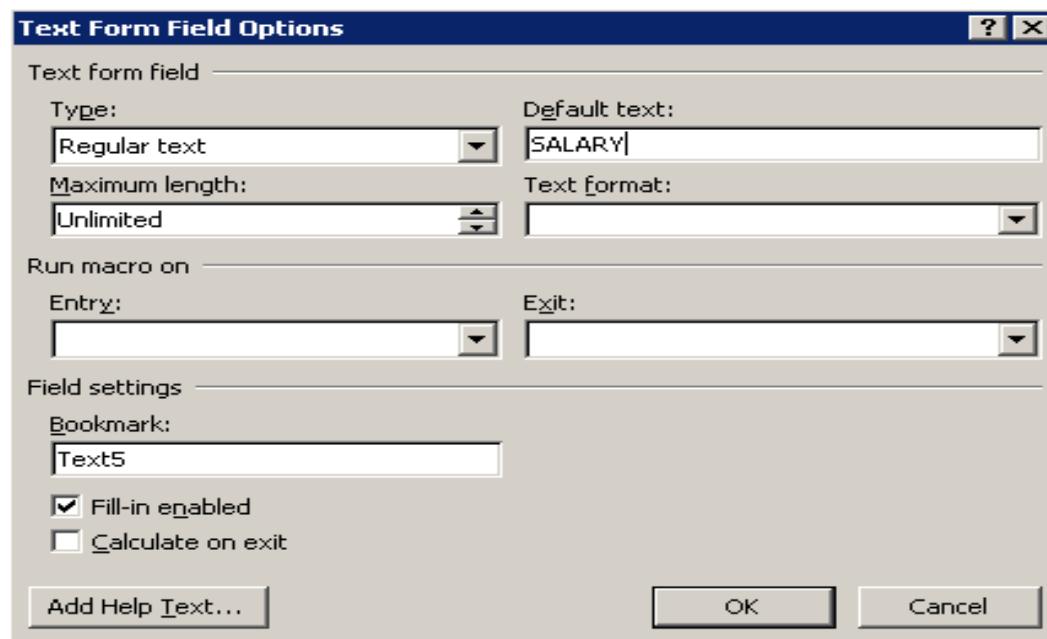
Zoom: 101%

Figure 1: Pie chart showing department distribution:

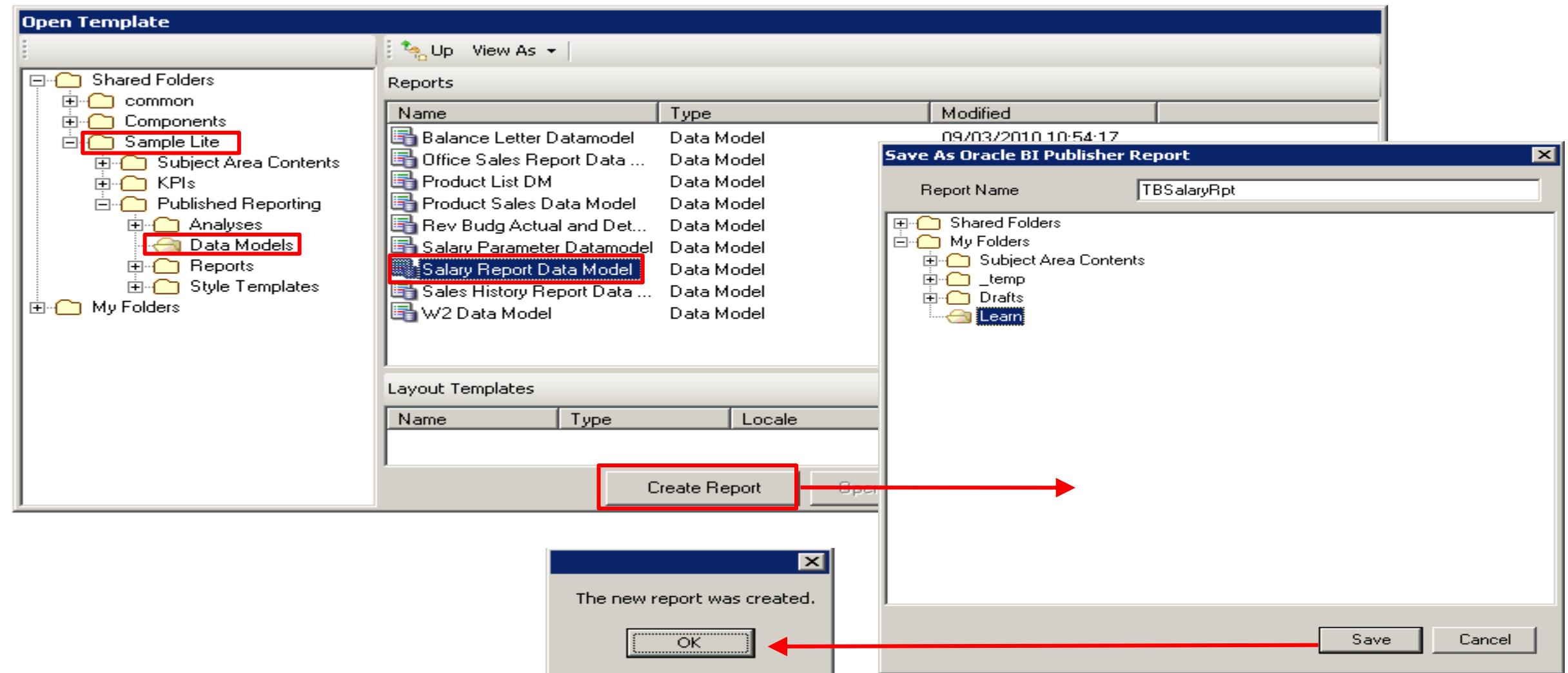
Department	Percentage
Accounting	19.21%
Administration	11.47%
Executive	11.3...
Finance	4.972%
Human Resources	3.928%
IT	4.690%
Marketing	10.12%
Public Relations	4.972%

Supported MS Word Native Formatting Features

- Alignment
- Fonts, background, text colors
- Table formats
- Clip art and images
- Headers, footers, and watermarks
- Date fields



Creating a New Report on BI Publisher Server Using Template Builder



Describing the Methods for Creating RTF Templates

BI Publisher supports the following two methods to add code:

- Basic RTF
- Form Field

Exploring the Basic Method: Example

User Listing Start.rtf [Compatibility Mode] - Microsoft Word

Home Insert Page Layout References Mailings Review View BI Publisher

Paste Clipboard Arial 10 AaBbCcI AaBbCcI AaBbCcA Change Styles Editing

B I U abe x₂ x² Aa ab Aa

Font Paragraph Styles

Normal No Spaci... Heading 1

Page 1 of 1

ORACLE

USER_NAME	ApplicationName	Responsibility Name	Start Date	End Date
	F APPLICATION_NAME	RESPONSIBILITY_NAME	START_DATE	END_DATE E

↓

Page 1 of 1

ORACLE

?USER_NAME?>

ApplicationName	Responsibility Name	Start Date	End Date
<?for-each:G_RESPS?><?APPLICATION_NAME??>	<?RESPONSIBILITY_NAME? >	<?START_DATE??>	<?END_DATE??><?end_for-each??>

Exploring the Form Field Method: Example – Form Fields in RTF Templates

- Form fields are Word objects that enable you to refer to other data.
- BI Publisher uses form fields to:
 - Reference data fields from the report definition
 - Embed instructions that control how data fields are laid out in the table

The screenshot displays an RTF template with two main sections. The top section is a table grouped by department name, and the bottom section is a page footer.

group ROW by DEPARTMENT_NAME

Full Name	Salary	Annual Salary	Title	Manager
FNAME	SALARY	ANNUAL_SALARY	JOB_TITLE	MANAGER_E

DEPARTMENT_NAME

end ROW by DEPARTMENT_NAME

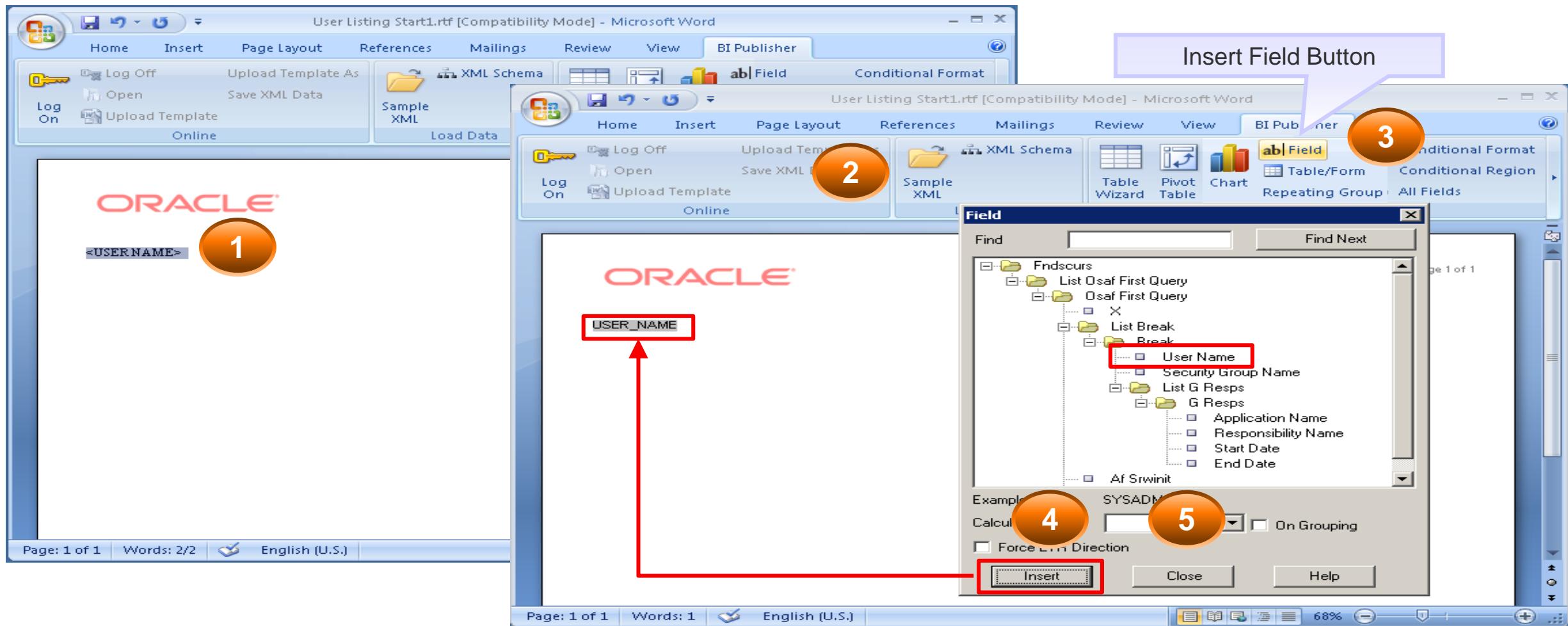
Page 1 of 1

ORACLE

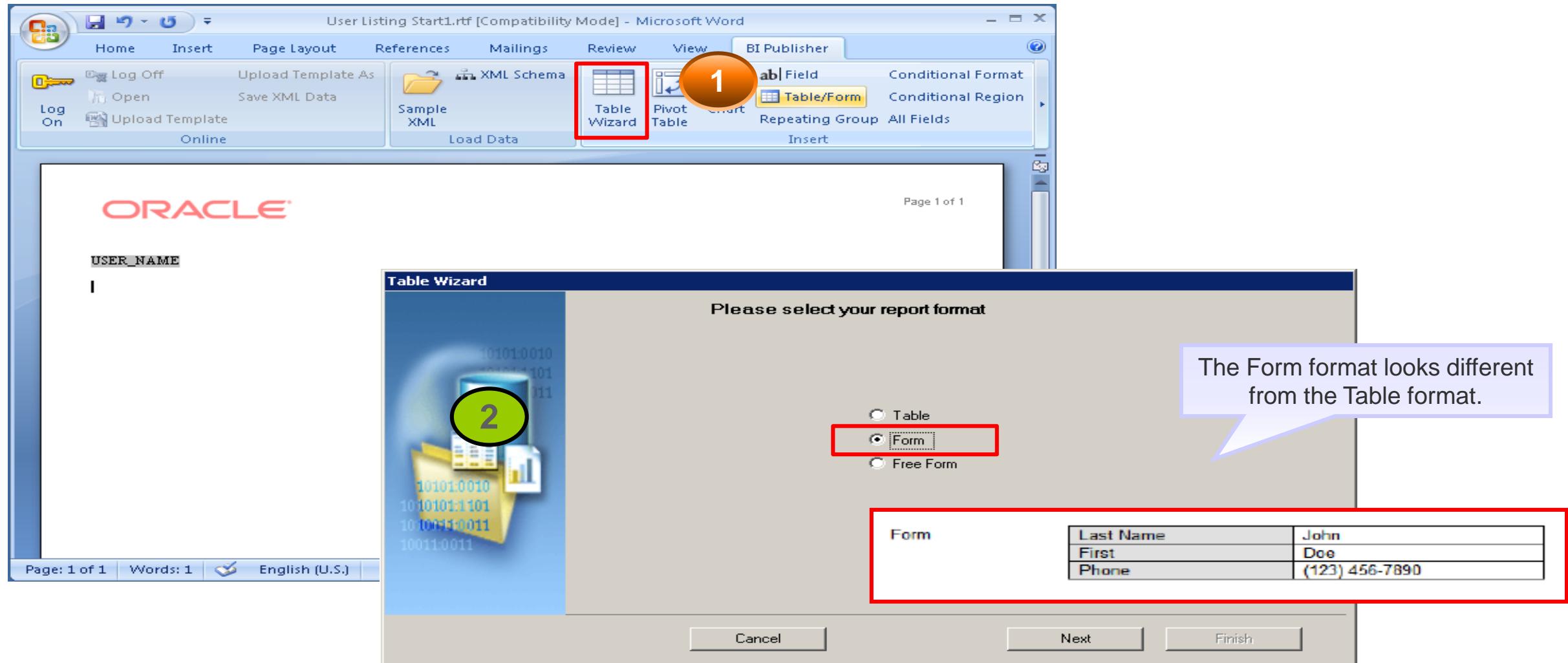
<USER_NAME>

Application Name	Responsibility Name	Start Date	End Date
FAPPLICATION_NAME	RESPONSIBILITY_NAME	START_DATE	END_DATE_E

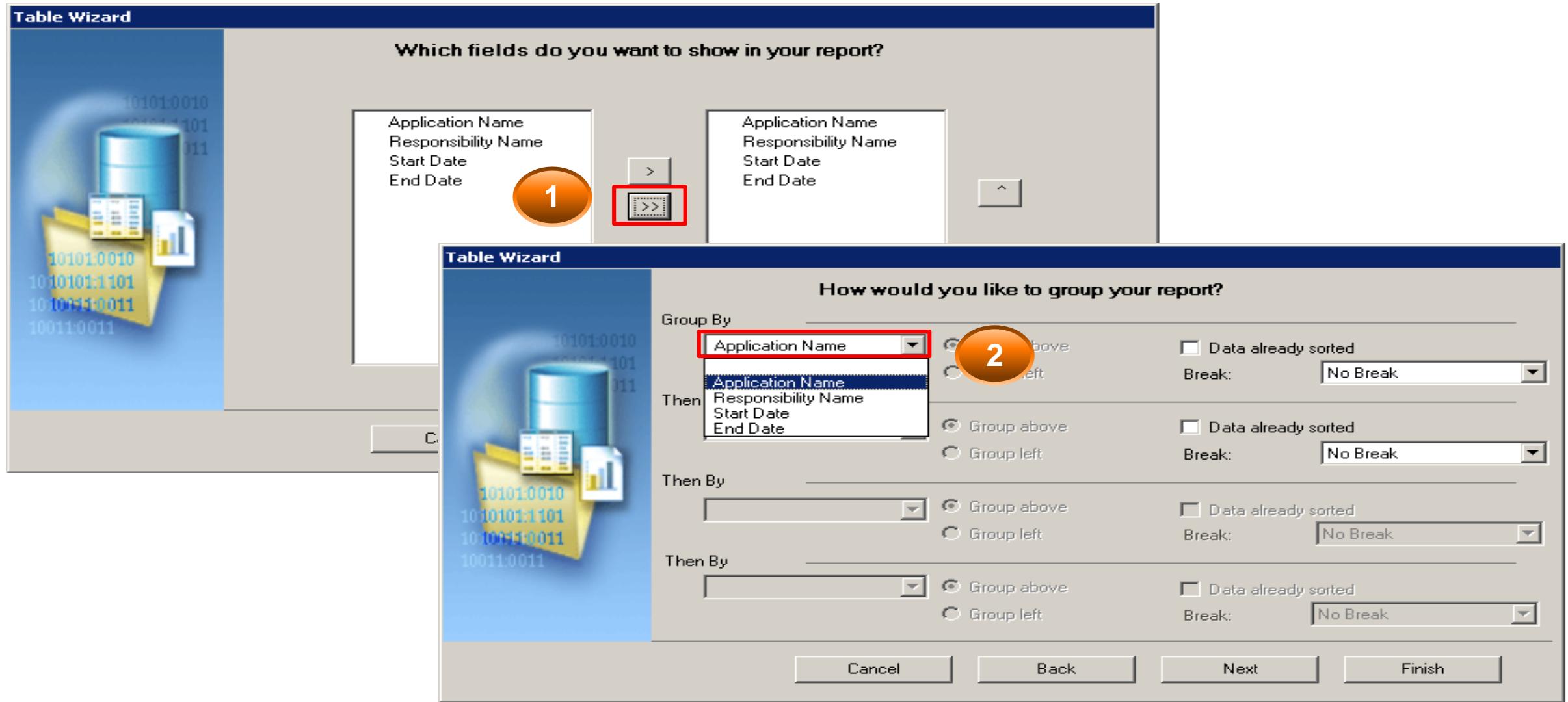
Exploring the Form Field Method: Example – Insert a Field



Exploring the Form Field Method: Example – Insert a Table



Exploring the Form Field Method: Example – Insert a Table



Exploring the Form Field Method: Example – Completed Template

The completed template should look like the following:

ORACLE

Page 1 of 1

```
USER_NAME
group G_RESPS by APPLICATION_NAME
APPLICATION_NAME
for-each current-group
Responsibility Name | RESPONSIBILITY_NAME
Start Date | START_DATE
End Date | END_DATE
end current-group
end G_RESPS by APPLICATION_NAME
```

Exploring the Form Field Method: Example – Previewing the Report

The screenshot shows a PDF document titled "91299104478781out.pdf" viewed in Adobe Reader. The document is a report generated by Oracle, featuring the Oracle logo at the top. It includes sections for "SYSADMIN", "iMeeting (obsolete)", and "Activity Based Management", each containing a table of responsibility data.

iMeeting (obsolete)

Responsibility Name	iMeeting End User responsibility
Start Date	08-AUG-01
End Date	26-NOV-02
Responsibility Name	iMeeting Guest user responsibility
Start Date	08-AUG-01
End Date	28-JAN-03
Responsibility Name	iMeeting System Configure responsibility
Start Date	08-AUG-01
End Date	28-JAN-03
Responsibility Name	iMeeting System Monitor responsibility
Start Date	12-SEP-01
End Date	26-NOV-02

Activity Based Management

Responsibility Name	ABM Manager
Start Date	11-FEB-00
End Date	06-DEC-01
Responsibility Name	ABM Supervisor
Start Date	19-APR-00
End Date	06-DEC-01

Private and Confidential

Exploring Advanced RTF Template Techniques

- Data handling:
 - Grouping
 - Sorting
- Running totals
- Page design and layout:
 - Page and section breaks
 - Page numbers
 - Formatting dates
 - Formatting numbers
- Conditional formatting
- Page-level calculations
- Background and watermarks
- Use of MS Word Drawings and Shapes

Performing Grouping in the Table Wizard

Table Wizard

How would you like to group your report?

Group By

Application Name Group above
 Group left

Then By

Then By Group above
 Group left

Data already sorted

USER_NAME
group G_RESPS by APPLICATION_NAME

APPLICATION_NAME

Responsibility Name	Start Date	End Date
F RESPONSIBILITY_NAME	START_DATE	END_DATE

end G_RESPS by APPLICATION_NAME

Group left

Group above

ORACLE
SYSADMIN

Application Name	Responsibility Name	Start Date	End Date
iMeeting (obsolete)	iMeeting End User responsibility	08-AUG-01	26-NOV-02
	iMeeting Guest user responsibility	08-AUG-01	26-NOV-02
	iMeeting System Configure responsibility	08-AUG-01	26-NOV-02
	iMeeting System Monitor responsibility	12-SEP-01	28-JAN-03
Activity Based Management	ABM Manager	11-FEB-00	28-JAN-03
	ABM Supervisor	19-APR-00	06-DEC-01

ORACLE
SYSADMIN

iMeeting (obsolete)			
Responsibility Name	Start Date	End Date	
iMeeting End User responsibility	08-AUG-01	26-NOV-02	
iMeeting Guest user responsibility	08-AUG-01	26-NOV-02	
iMeeting System Configure responsibility	08-AUG-01	26-NOV-02	
iMeeting System Monitor responsibility	12-SEP-01	28-JAN-03	

Activity Based Management

Responsibility Name	Start Date	End Date
ABM Manager	11-FEB-00	28-JAN-03
ABM Supervisor	19-APR-00	28-JAN-03

Performing Sorting in the Table Wizard

Table Wizard

Which fields would you like to use to sort the data?

Sort By Application Name Ascending Date/Text
 Descending Number

Then By Start Date Ascending Date/Text
 Descending Number

Then By Ascending Date/Text
 Descending Number

Then By Ascending Date/Text
 Descending Number

Sorting at multiple levels

361299112219437out.pdf - Adobe Reader

File Edit View Document Tools Window Help

Printer icon | Print icon | Back icon | Forward icon | Page 1 / 3 | Zoom icons | 52.0

Sorted first by Application Name and then by Start Date

Page 1 of 3

ORACLE

SYSADMIN

Application Name	Responsibility Name	Start Date	End Date
XML Publisher	XML Publisher Administrator	22-AUG-03	10-MAR-04
XML Gateway	XML Gateway	01-JAN-00	06-DEC-01
SEM Exchange	SEM Exchange Manager	17-FEB-00	26-NOV-02
System Administration	System Administrator	01-JAN-00	06-DEC-01
Support	Customer Support, Vision Operations	13-JAN-00	06-DEC-01
Service	Knowledge Base Agent, Vision Operations	15-FEB-00	26-NOV-02
Service	Knowledge Base System Administrator, Vision Operations	15-FEB-00	26-NOV-02
Service	Knowledge Base Worker, Vision Operations	15-FEB-00	26-NOV-02
Self-Service Web Applications	Preferences SSWA	05-MAR-97	06-DEC-01
Self-Service Web Applications	System Administration	05-MAR-97	06-DEC-01
Self-Service Web Applications	Self-Service Web Applications	05-SEP-07	

Adding Running Totals in the Table Wizard

Select the numeric field.

Click Running Total.

Make your selections.

1

2

3

Table Wizard

Which fields do you want to show in your report?

Trx Number
Trans Type
Transaction Date
Trans Amount
Trans Amount Remaining
Receipt Amount
Adjustment Amount
Bank Charge
On Account Credit
On Account Receipts

Running Total

Field: Trans Amount

Running Total

Formula

multiply by
divide by

Trx Number
Trans Type
Transaction Date
Trans Amount
Trans Amount Remaining
Receipt Amount
Adjustment Amount

RTVRTV

Trx Number	Trans Type	Transaction Date	Running Total Trans Amount	Running Total Trans Amount Remaining
F TRX_NUMBER	TRANS_TYPE	TRANSACTION_DATE	Running_Total_TRANS_AMOUNT	Running_Total_TRANS_AMOUNT_Remaining

Dear Sirs/Madam,
According to our records, as of AS_OF_DATE, we show the following open balances.
Your TRX_CURRENCY_CODE balance is C_INV_OPEN_BALANCE, made up as follows:

Adding Page and Section Breaks in the Table Wizard

Table Wizard

How would you like to group your report?

Group By

Application Name Group above Data already sorted
 Group left Break: No Break
 Page Section

Then By

Start Date Group above Data already sorted
 Group left Break:

Then By

Then By

Cancel Back

↓

ORACLE
Applications BIS
01-JAN-51

Responsibility Name	End Date
Business Intelligence System, Vision Operations (USA)	19-APR-00
Business Views Setup	28-JAN-03

Page 1 of 4

USER_NAME
group G_RESPS by APPLICATION_NAME

APPLICATION_NAME
group by START_DATE

START_DATE

Responsibility Name	End Date
F RESPONSIBILITY NAME	END DATE E

page breakend by START_DATE
end G_RESPS by APPLICATION_NAME

ORACLE
11-NOV-04

Responsibility Name	End Date
Custom AOL Workbooks	19-APR-00

Page 2 of 4

Practice 7-3: Overview

This practice covers the following:

- Opening a BI Publisher report
- Adding a table to a BI Publisher report
 - Grouping
 - Sorting
 - Adding a running total
 - Adding a section break
- Adding a chart to a BI Publisher report
- Previewing the report data in Template Builder
- Uploading the RTF template to the BI Publisher Server
- Viewing the report in BI Publisher Enterprise Edition

Adding Page Numbers

The screenshot illustrates the steps to add page numbers to a Microsoft Word document:

- A sample template with default page numbering:** The top left shows a template with placeholder text and a table. A red box highlights "Page 1 of 1" at the top right.
- An edited report:** The bottom right shows the final PDF output from Adobe Reader, titled "861299178142218out.pdf". It contains the same content as the template but includes a footer with the page number "1 | Page".
- Select the page number style:** The bottom left shows the Microsoft Word ribbon with the "Insert" tab selected. The "Header & Footer Tools" tab is open, and the "Page Number" dropdown is highlighted. A callout box points to the "Page Number" section of the ribbon.
- Word ribbon details:** The ribbon also shows other tabs like Home, Page Layout, References, etc., and various icons for inserting tables, charts, and shapes.

Formatting Dates

The screenshot illustrates the process of formatting dates in an Oracle BI Publisher report.

BI Publisher Properties Dialog:

- General:** Data Field is set to `TRANSACTION_DATE`, and Text to display is also `TRANSACTION_DATE`.
- Formatting:** Type is set to `Regular Text`. A red box highlights the `TRANSACTION_DATE` field in the main table above.
- Word Properties:** A red box highlights this button, with a callout pointing to it from the bottom-left.

Text Form Field Options Dialog:

- Type is set to `Date`. A red box highlights this selection.
- Default date: `MM/dd/yy` is selected in the dropdown menu. A red box highlights this option.
- Maximum length: `Unlimited`
- Date format: A dropdown menu showing various date formats, with `MM/dd/yy` highlighted by a red box.
- Run macro on: `Entry`
- Field settings: Bookmark is set to `Text17`.
- Checkboxes: `Fill-in enabled` (checked) and `Calculate on exit` (unchecked).
- Buttons: `OK` and `Cancel`.

Output in Adobe Reader:

The generated PDF document displays the **ORACLE** logo and company information:

Vision Operations
5645 Main Street
Jacksonville, FL 32209-1234

Dear Sir/Madam,

According to our records, as of 2004-01-01, we show the following open balances.

Your CAD balance is 31500, made up as follows:

Trx Number	Trans Type	Transaction Date
502444	Standard	12/06/03
502445	Standard	12/06/03
10019903	Standard	11/18/03
10020178	Standard	11/20/03
10020219	Standard	11/21/03
502394	Standard	11/22/03
10020280	Standard	11/24/03
10020310	Standard	11/25/03
10020319	Standard	11/26/03
234	Standard	12/02/03
10020402	Standard	12/04/03
10020403	Standard	12/04/03
10020404	Standard	12/04/03
10020405	Standard	12/04/03

The `Transaction Date` column is highlighted with a red box.

Formatting Numbers

The screenshot illustrates the configuration of a BI Publisher report for formatting numbers. It shows three main components:

- BI Publisher Properties Dialog:** This dialog is used to define the data field and its display properties. The "Data Field" is set to `TRANS_AMOUNT` and the "Text to display" is also `TRANS_AMOUNT`. The "Word Properties" button is highlighted with a red box.
- Text Form Field Options Dialog:** A modal dialog that appears when the "Word Properties" button is clicked. It contains settings for the text form field:
 - Type:** Number
 - Default number:** 1,000.00
 - Maximum length:** Unlimited
 - Number format:** #,##0.00
- Generated PDF Report:** The report header includes the Oracle logo and company information: Vision Operations, 5645 Main Street, Jacksonville, FL 32209-1234. The body of the report displays a table of transaction data, with the "Trans Amount" column highlighted by a red box. The table data is as follows:

Trx Number	Trans Type	Transaction Date	Trans Amount
502444	Standard	2003-12-05	19.125,00
502445	Standard	2003-12-05	12.375,00
10019903	Standard	2003-11-18	132.733,84
10020178	Standard	2003-11-20	71.577,42
10020219	Standard	2003-11-21	89.344,81
502394	Standard	2003-11-22	11.250,00
10020260	Standard	2003-11-24	128.654,96
10020310	Standard	2003-11-25	120.653,20
10020319	Standard	2003-11-26	147.328,21
234	Standard	2003-12-02	53,35
10020402	Standard	2003-12-04	146.776,07
10020403	Standard	2003-12-04	172.482,45
10020404	Standard	2003-12-04	147.740,25
10020405	Standard	2003-12-04	71.577,42
10020406	Standard	2003-12-04	89.344,81
10020407	Standard	2003-12-04	223.563,03
10020408	Standard	2003-12-04	176.353,56
10020487	Standard	2003-12-05	112.902,54
10020520	Standard	2003-12-09	147.740,25
10020522	Standard	2003-12-09	261.904,71

Applying Conditional Formats

The screenshot shows the Microsoft Word ribbon with the 'BI Publisher' tab selected. A red arrow points from the 'Conditional Format' button in the ribbon to the 'Conditional Format' button in the 'Insert' tab of the BI Publisher ribbon.

Select a data column...

...set the condition...

...and determine the format.

BI Publisher Properties

Properties | Advanced | General

Data field: TRANS_AMOUNT Number

Condition 1:

Data field: Greater than or equal to 250000

Condition 2:

Data field: Preview: Text Format...

Format

Background Color: Red

Font Color: Black

Font Style: Bold

Preview: Text

OK Cancel

Applying Conditional Formats: Results

The completed dialog box

The transaction amount reflects the conditional formatting by displaying a "C."

Conditional formatting applied to the PDF output

BI Publisher Properties

Properties | Advanced

General

Data field: TRANS_AMOUNT Number
Apply to Entire Table Row

Condition 1

Data field: Greater than or equal to 250000 Text

Condition 2

Data field: Less than 100000 Text

Word Properties

OK Cancel

331299195367171out.pdf - Adobe Reader

File Edit View Document Tools Window Help

45.5% Find

ORACLE

Vision Operations
5645 Main Street
Jacksonville, FL 32209-1234

Dear Sir/Madam,

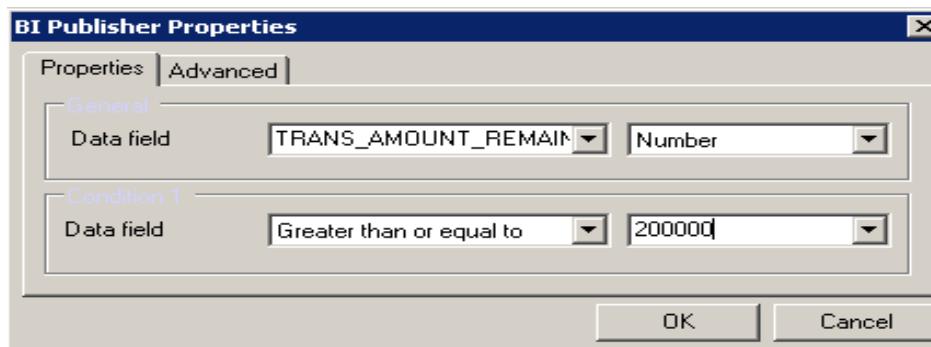
According to our records, as of 2004-01-01, we show the following open balances.

Your CAD balance is 31500, made up as follows:

Trx Number	Trans Type	Transaction Date	Trans Amount	Trans Amount Remaining
502444	Standard	2003-12-06	18,125.00	19125
502445	Standard	2003-12-06	12,375.00	12375
10019503	Standard	2003-11-18	132,733.84	132733.84
10020178	Standard	2003-11-20	71,577.42	71577.42
10020219	Standard	2003-11-21	89,344.81	89344.81
502394	Standard	2003-11-22	11,250.00	11250
10020280	Standard	2003-11-24	128,654.96	128654.96
10020310	Standard	2003-11-25	120,653.20	120653.2
10020319	Standard	2003-11-26	147,328.21	147328.21
234	Standard	2003-12-02	53.35	53.35
10020402	Standard	2003-12-04	146,776.07	146776.07
10020403	Standard	2003-12-04	172,482.45	172482.45
10020404	Standard	2003-12-04	147,740.25	147740.25
10020405	Standard	2003-12-04	71,577.42	71577.42
120406	Standard	2003-12-04	89,344.81	89344.81
120407	Standard	2003-12-04	223,563.03	223563.03
120408	Standard	2003-12-04	176,353.55	176353.55
120487	Standard	2003-12-05	112,902.54	112902.54
120520	Standard	2003-12-09	147,740.25	147740.25
120522	Standard	2003-12-09	281,804.71	281804.71

Trx Number: FTRX_NUMBER Trans Type: TRANS_TYPE Transaction Date: TRANSACTION_DATE Trans Amount: C 1,000.00 Trans Amount Remaining: TRANS_AMOUNT_Remaining E

Creating a Conditional Region



The completed dialog box

The PDF document titled '761299195900843out.pdf' is shown in Adobe Reader. The page contains the following text and table:

ORACLE®
Vision Operations
5645 Main Street
Jacksonville, FL 32209-1234

Dear Sir/Madam,

According to our records, as of 2004-01-01, we show the following open balances.

Your CAD balance is 31500, made up as follows:

Trx Number	Trans Type	Transaction Date	Trans Amount
10020407	Standard	2003-12-04	223.563,03
10020522	Standard	2003-12-09	281.904,71

Please confirm the above information.
Regards,
Receivables Manager

A callout bubble points to the table with the text: 'A conditional region applied to the PDF output'

Adding Page-Level Calculations

- The following types of page-level calculations are supported:
 - Page totals
 - Brought-forward or carried-forward totals
 - Running totals
- These features are performed by the PDF-formatting layer; therefore, they are not available for other output types, such as HTML, RTF, or Excel.

Adding Page-Level Calculations

The diagram illustrates the configuration of page-level calculations in a BI Publisher report. It shows two report templates and their corresponding BI Publisher Properties dialog boxes.

Report Template 1: This template displays a single row for a total salary. The BI Publisher Properties dialog box shows the code: <?add-page-total:pt:'SALARY'?>. A callout box explains that PT = add-page-total for SALARY.

Name	Job Title	Manager	Department Name	Salary
TOTAL				9,999.00

Report Template 2: This template displays a detailed list of employee salaries. The BI Publisher Properties dialog box shows the code: <?show-page-total:pt:'99G999G999D00'?>. A callout box explains that show-page-total with mask is used.

Name	Job Title	Manager	Department Name	Salary
Neena Kochhar	Administration Vice President	Steven King	Executive	17,000.00
Lex De Haan	Administration Vice President	Steven King	Executive	17,000.00
Alexander Hunold	Programmer	Lex De Haan	IT	9,000.00
Bruce Ernst	Programmer	Alexander Hunold	IT	6,000.00
David Austin	Programmer	Alexander Hunold	IT	4,800.00
Valli Pataballa	Programmer	Alexander Hunold	IT	4,800.00
Diana Lorentz	Programmer	Alexander Hunold	IT	4,200.00
Nancy Greenberg	Finance Manager	Neena Kochhar	Finance	12,000.00
Daniel Faviet	Accountant	Nancy Greenberg	Finance	9,000.00
John Chen	Accountant	Nancy Greenberg	Finance	8,200.00
Ismail Sciarra	Accountant	Nancy Greenberg	Finance	7,700.00
José Manuel Uman	Accountant	Nancy Greenberg	Finance	7,800.00
Luis Poop	Accountant	Nancy Greenberg	Finance	6,900.00
Den Raphaely	Purchasing Manager	Steven King	Purchasing	11,000.00
Alexander Khoo	Purchasing Clerk	Den Raphaely	Purchasing	3,100.00
Shelli Baida	Purchasing Clerk	Den Raphaely	Purchasing	2,900.00
Sigal Tobias	Purchasing Clerk	Den Raphaely	Purchasing	2,800.00
Guy Himuro	Purchasing Clerk	Den Raphaely	Purchasing	2,600.00
Karen Colmenares	Purchasing Clerk	Den Raphaely	Purchasing	2,500.00
Matthew Weiss	Stock Manager	Steven King	Shipping	8,000.00
Adam Fripp	Stock Manager	Steven King	Shipping	8,200.00
Payam Kaufling	Stock Manager	Steven King	Shipping	7,900.00
Shanta Vollman	Stock Manager	Steven King	Shipping	6,500.00
Kevin Mourgos	Stock Manager	Steven King	Shipping	5,800.00
Julia Nayer	Stock Clerk	Matthew Weiss	Shipping	3,200.00
Irene Mikkilineni	Stock Clerk	Matthew Weiss	Shipping	2,700.00
James Landry	Stock Clerk	Matthew Weiss	Shipping	2,400.00
Steven Markle	Stock Clerk	Matthew Weiss	Shipping	2,200.00
Laura Bissot	Stock Clerk	Adam Fripp	Shipping	3,300.00
Mozhe Atkinson	Stock Clerk	Adam Fripp	Shipping	2,800.00

Brought-Forward and Carried-Forward Totals

End Header; Start Body

Employee Salary Report				
Name	Job Title	Manager	Department Name	Salary
F if odd: NAME	JOB_TITLE	MANAGER	DEPARTMENT_NAME	PT; 999.00;end odd
if even: NAME	JOB_TITLE	MANAGER	DEPARTMENT_NAME	PT; 999.00;end even; E
TOTAL				9,999.00

End Body; Start Footer

Total Salary on Page: 9999				
Carry Forward: 1000				
Brought Forward: 192,300.00				

Name	Job Title	Manager	Department Name	Salary
James Marlow	Stock Clerk	Adam Fripp	Shipping	2,500.00
TJ Olson	Stock Clerk	Adam Fripp	Shipping	2,100.00
Jason Mallin	Stock Clerk	Payam Kaufling	Shipping	3,300.00
Michael Rogers	Stock Clerk	Payam Kaufling	Shipping	2,900.00
Ki Gee	Stock Clerk	Payam Kaufling	Shipping	2,400.00
Hazel Philtanker	Stock Clerk	Payam Kaufling	Shipping	2,200.00
Renske Ladwig	Stock Clerk	Shanta Vollman	Shipping	3,600.00
Stephen Stiles	Stock Clerk	Shanta Vollman	Shipping	3,200.00
John Seo	Stock Clerk	Shanta Vollman	Shipping	2,700.00
Joshua Patel	Stock Clerk	Shanta Vollman	Shipping	2,500.00
Trenna Rais	Stock Clerk	Kevin Mourgos	Shipping	3,500.00
Curtis Davies	Stock Clerk	Kevin Mourgos	Shipping	3,100.00
Randall Matos	Stock Clerk	Kevin Mourgos	Shipping	2,600.00
Peter Vargas	Stock Clerk	Kevin Mourgos	Shipping	2,500.00
John Russell	Sales Manager	Steven King	Sales	14,000.00
Karen Partners	Sales Manager	Steven King	Sales	13,500.00
Alberto Errazuriz	Sales Manager	Steven King	Sales	12,000.00
Gerald Cambrault	Sales Manager	Steven King	Sales	11,000.00
Eleni Zlotkey	Sales Manager	Steven King	Sales	10,500.00
Peter Tucker	Sales Representative	John Russell	Sales	10,000.00
David Bernstein	Sales Representative	John Russell	Sales	9,500.00
Peter Hall	Sales Representative	John Russell	Sales	9,000.00
Christopher Olsen	Sales Representative	John Russell	Sales	8,000.00
Nanette Cambrault	Sales Representative	John Russell	Sales	7,500.00
Oliver Tuvault	Sales Representative	John Russell	Sales	7,000.00
Janette King	Sales Representative	Karen Partners	Sales	10,000.00
Patrick Sully	Sales Representative	Karen Partners	Sales	9,500.00
Allan McEwen	Sales Representative	Karen Partners	Sales	9,000.00
Lindsey Smith	Sales Representative	Karen Partners	Sales	8,000.00
Louise Doran	Sales Representative	Karen Partners	Sales	7,500.00
Sarah Sewall	Sales Representative	Karen Partners	Sales	7,000.00
Clara Vishney	Sales Representative	Alberto Errazuriz	Sales	10,500.00
Danielle Greene	Sales Representative	Alberto Errazuriz	Sales	9,500.00
Matteia Marvins	Sales Representative	Alberto Errazuriz	Sales	7,200.00

Total Salary on Page: **229,300.00**

Carry Forward: **421,600,00**

Brought Forward: **1000**

BI Publisher Properties

Code

```
<xxdofo:show-brought-forward name="pt"
format="99G999G999D00"/>
```

Text to display **1000**

Word Properties OK Cancel

show-brought-forward with mask

BI Publisher Properties

Code

```
<xxdofo:show-carry-forward name="pt"
format="99G999G999D00"/>
```

Text to display **1000**

Word Properties OK Cancel

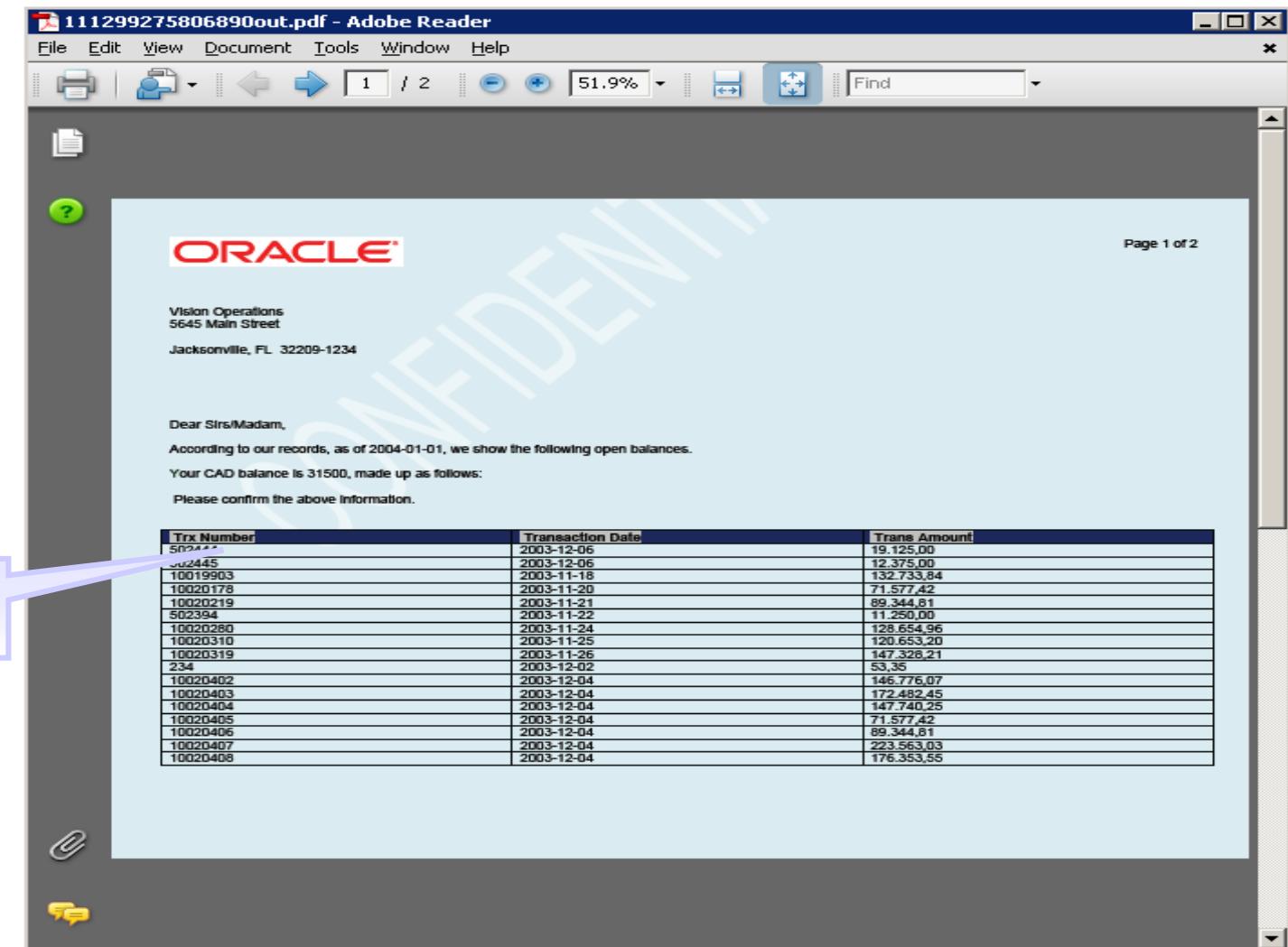
show-carry-forward with mask

Adding Backgrounds and Watermarks

BI Publisher supports the following:

- Adding a color as background in MS Word
- Adding text or image watermarks (in MS Word 2002 or later)

Watermark and background color added



Drawings and Shapes

The following AutoShape categories are supported:

- Lines: Straight, arrows, connectors, curve, free-form, and scribble
- Connectors: Only straight connectors
- Basic shapes: All shapes
- Block arrows: All arrows
- Flowchart: All objects
- Stars and banners: All objects
- Callouts: All callouts except “line” callouts

Other supported graphic features:

- Freehand drawing
- Hyperlinks
- Layering
- MS equation
- Organization chart
- WordArt

Practices 7-4 and 7-5: Overview

These practices cover the following:

- Creating an RTF template by using the form field method
 - Formatting a date
 - Formatting a number
 - Adding conditional formatting
- Previewing the report data in Template Builder
- Opening a predefined RTF template and loading XML data
- Reviewing page-level calculations (page totals and Brought forward and Carry Forward totals)

Introducing Excel Templates

An Excel Template is a BI Publisher report layout designed in MS Excel. When you install Template Builder for Word, it also installs the plug-in for Excel.

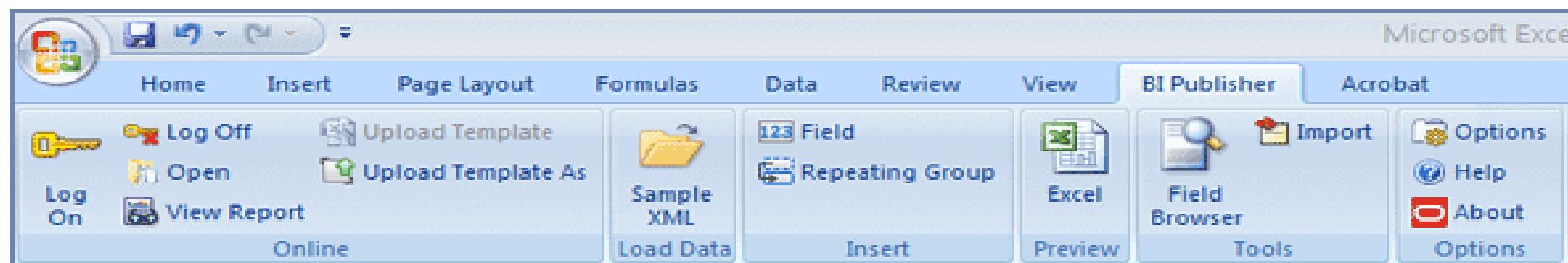
With Excel templates, you can:

- Map the BI Publisher data to worksheets
- Define the format for the data in Excel output
- Split hierarchical data across multiple sheets and dynamically name the sheets
- Create worksheets that have master-detail relationships

Excel Template Builder

Excel Template Builder consists of the BI Publisher menu bar, which has options and subordinate menus grouped into the following six menus:

- Online
- Load Data
- Insert
- Preview
- Tools
- Options



Examining a Sample Excel Template

The screenshot shows the Oracle BI Publisher interface with two reports displayed:

Report 1: Employees by Department Report

Employee Name	Employee ID	Email	Telephone	Hire Date	Salary
John Thomas	100001	john@oracle.com	111-333-3333	3-Feb-96	10,000

Report 2: tmp61714462.xls

Employee Name	Employee ID	Email	Telephone	Hire Date
Jennifer Whalen	200	JWHALEN	515.123.4444	17-Sep-87

BI Publisher Toolbar:

- Home, Menu, Insert, Page Layout, Formulas, Data, Review, View, BI Publisher
- Log Off, Log On, Open, View Report, Upload Template, Upload Template As, Sample XML, Load Data, Insert, Field, Repeating Group, Excel, Preview, Import, Field Browser, Tools

Address Bar: B14, f_x, 202

File Name: EmplsbyDeptSimple.xls [Compatibility Mode]

Sheet: Sheet1

Quiz: Overview

This quiz examines your knowledge of the concepts discussed in the lesson.

Quiz

You can work with Template Builder online to connect to BI Publisher Server and generate templates for reports, or you can work with it offline to create templates based on sample XML data or files.

- a. True
- b. False

Quiz

You use the Insert menu to insert PDFs into your RTF template.

- a. True
- b. False

Quiz

You use the Options menu to perform which of the following tasks?

- a. Change the locale.
- b. Specify the options that influence the Preview functionality of Template Builder.
- c. Specify the options that influence how Template Builder generates tables and forms.

Quiz

You can load sample XML offline.

- a. True
- b. False

Quiz

Template Builder enables you to apply conditional formats to table data.

- a. True
- b. False

Quiz

The Excel Template Builder enables a direct connection to the BI Publisher Server from your desktop Excel session.

- a. True
- b. False

Summary

In this lesson, you should have learned how to:

- Describe the functions and features of Template Builder
- Describe how to install Template Builder
- Create RTF templates for sample XML report data
- Create RTF templates by using Basic and Form Field methods
- Create and publish RTF templates for BI Publisher reports
- Insert tables, forms, charts, and other components into RTF templates
- Create BI Publisher reports by using Template Builder
- Work with advanced RTF template techniques
- Describe Template Builder for Excel

8. BI Publisher Server: Administration and Security

Objectives

- After completing this lesson, you should be able to:
 - Describe BI Publisher administration tasks
 - Configure data sources
 - Identify BI Publisher–supported security models
 - Configure security settings
 - Verify user roles and permissions
 - Configure the delivery options
 - Verify the Scheduler configuration
 - Manage the runtime configuration
 - Configure the integration settings

Administration Page

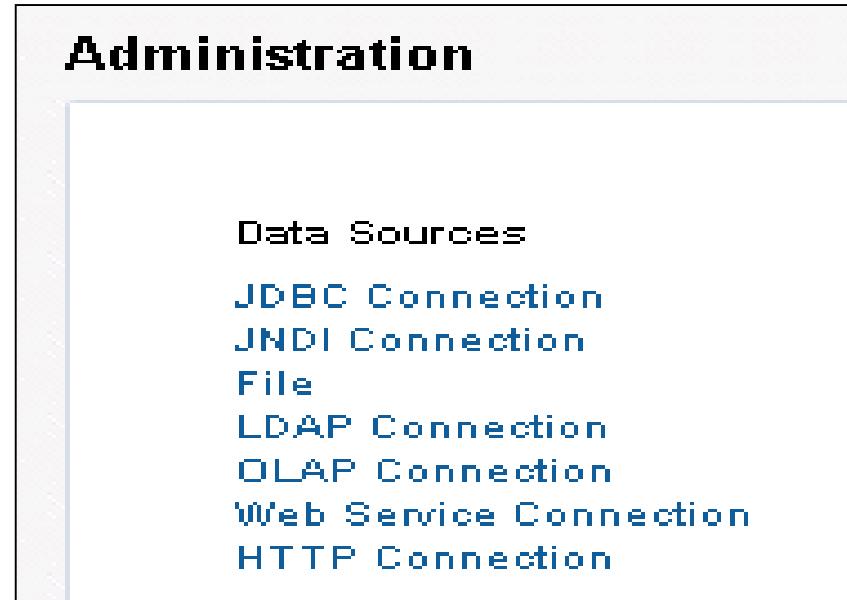
- The Administration page enables you to manage various tasks for configuring BI Publisher settings.

The screenshot shows the Oracle BI Publisher Enterprise Administration page. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (weblogic), Help, and Sign Out. The main content area is organized into several sections, each with a red box highlighting its title:

- Data Sources**: Includes JDBC Connection, JNDI Connection, File, LDAP Connection, OLAP Connection, Web Service Connection, and HTTP Connection.
- System Maintenance**: Includes Server Configuration, Scheduler Configuration, Scheduler Diagnostics, Report Viewer Configuration, and Manage Cache.
- Security Center**: Includes Security Configuration, Roles and Permissions, and Digital Signature.
- Runtime Configuration**: Includes Properties, Font Mappings, and Currency Formats.
- Delivery**: Includes Delivery Configuration, Printer, Fax, Email, WebDAV, HTTP, FTP, Content Server, and CUPS Server.
- Integration**: Includes Oracle BI Presentation Services.

Data Sources

- BI Publisher supports retrieving data from a variety of data sources. You can create connections with any one of the data sources.



Setting Data Sources: JDBC

Administration > JDBC

Data Sources

JDBC JNDI File LDAP OLAP Web Services HTTP

Add Data Source

Data Source Name: demo

General

TIP Please make sure to install the required JDBC driver classes.
TIP With Oracle Fusion Middleware Security Model, select the Use System User checkbox to use the BI System User for your BI Server Database Connection.

Data Source Name: demo
* Driver Type: Oracle 12c
* Database Driver Class: oracle.jdbc.OracleDriver
(Example: oracle.jdbc.OracleDriver)
* Connection String: jdbc:oracle:thin:@localhost:1521:orcl

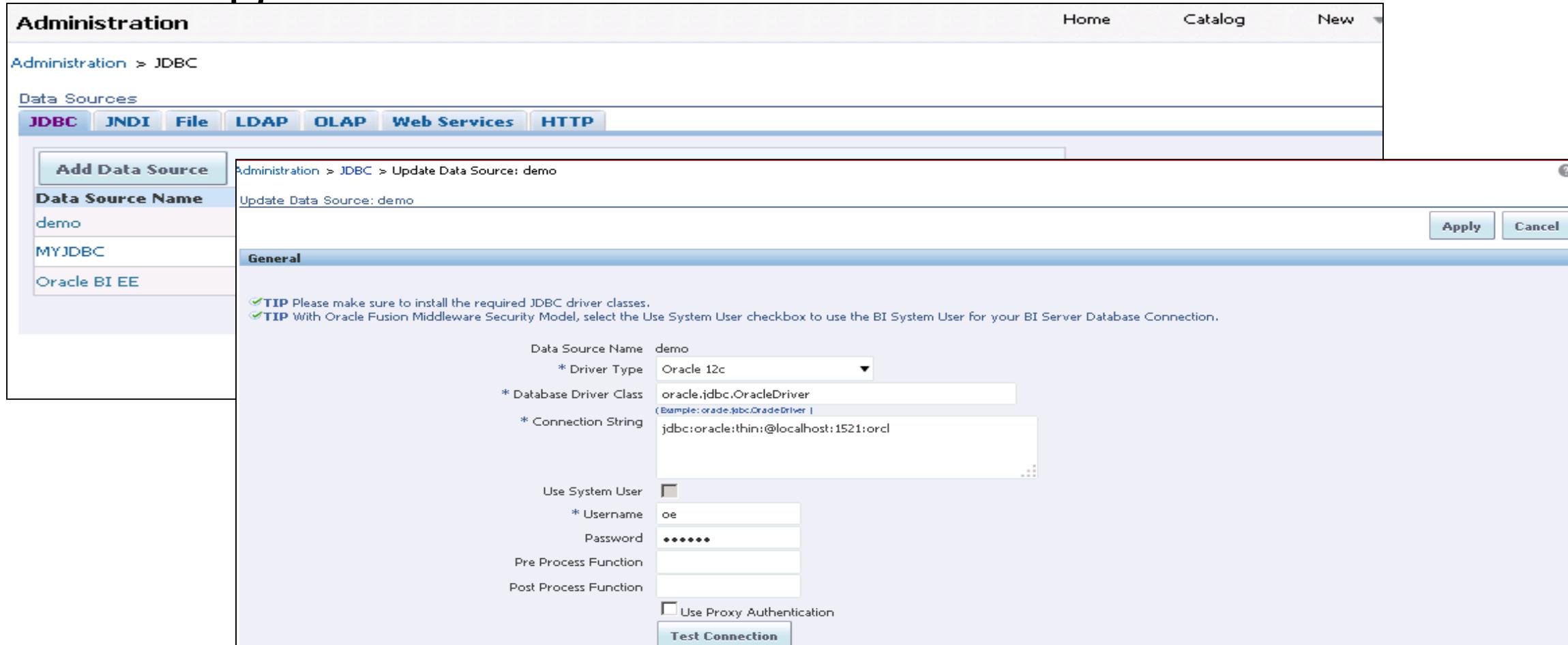
Use System User:
* Username: oe
Password: *****
Pre Process Function:
Post Process Function:
 Use Proxy Authentication
Test Connection

Home Catalog New

Administration > JDBC > Update Data Source: demo

Update Data Source: demo

Apply Cancel



Defining a JDBC Connection

The screenshot illustrates the process of defining a JDBC connection in the Oracle Database Administration interface.

Left Panel (Administration):

- Data Sources
 - JDBC Connection** (highlighted with a red line)
 - JNDI Connection
 - File
 - LDAP Connection
 - OLAP Connection
 - Web Service Connection
 - HTTP Connection

Bottom Panel (Administration):

- Navigation: Administration > JDBC
- Home Catalog New
- Data Sources
 - JDBC** (highlighted with a blue arrow)
 - JNDI
 - File
 - LDAP
 - OLAP
 - Web Services
 - HTTP
- Add Data Source
- Table: Data Sources

Data Source Name	Connection String	Delete
demo	jdbc:oracle:thin:@localhost:1521:orcl	
MYJDBC	jdbc:oracle:thin:@localhost:1521:orcl	
Oracle BI EE	jdbc:oracle:oci:/EDVMR1P0:9514/	

Defining a JDBC Connection

administration > JDBC > Add Data Source

Add Data Source

General

* Data Source Name:

* Driver Type: Oracle 12c

* Database Driver Class: oracle.jdbc.OracleDriver

(Example: oracle.jdbc.OracleDriver
jdbc:oracle:thin:@[host]:[port]:[sid])

* Connection String:

Use System User:

* Username: weblogic

Password: 

Pre Process Function:

Post Process Function:

Use Proxy Authentication

Test Connection

Confirmation
Connection established successfully.

Apply Cancel



The screenshot shows the 'Add Data Source' page for defining a JDBC connection. The 'General' tab is selected. The 'Data Source Name' field is empty. The 'Driver Type' is set to 'Oracle 12c'. The 'Database Driver Class' is 'oracle.jdbc.OracleDriver'. The 'Connection String' field contains the placeholder 'jdbc:oracle:thin:@[host]:[port]:[sid]'. Under 'Use System User', there is a checked checkbox. The 'Username' is 'weblogic' and the 'Password' is redacted. Below the password field are 'Pre Process Function' and 'Post Process Function' fields, both empty. A 'Use Proxy Authentication' checkbox is unchecked. A blue arrow points from the 'Test Connection' button to a confirmation message box. The confirmation message box has a red border and contains the text 'Confirmation' with a checkmark icon, followed by 'Connection established successfully.'.

Setting Data Sources: JNDI

- JNDI connection pool is the recommended data source setup.

The screenshot shows the Oracle BI Administration interface. On the left, a sidebar titled 'Administration' has 'JNDI' selected under 'Data Sources'. A central dialog box is titled 'Add Data Source' and is divided into 'General' and 'Security' tabs. The 'General' tab contains fields for 'Data Source Name' (with 'JNDI' selected), 'JNDI Name', 'Pre Process Function', 'Post Process Function', and a checkbox for 'Use Proxy Authentication' with a 'Test Connection' button. The 'Security' tab includes an 'Allow Guest Access' checkbox, 'Available Roles' (with 'BI Consumer' and 'BI Content Author' listed), and 'Allowed Roles' (with a list of roles and buttons for 'Move', 'Move All', 'Remove', and 'Remove All').

Setting Data Sources: Files

Administration

Administration > File

Data Sources

JDBC **JNDI** **File** **LDAP** **OLAP** **Web Services** **HTTP**

Add Data Source

Administration > File > Add Data Source

Add Data Source

General

* Data Source Name

* Full Path of Top-level Directory
Users can access files in this directory and any subdirectories.

Security

Allow Guest Access

Available Roles

Allowed Roles

Move

Apply Cancel

Home Catalog

Setting Data Sources: LDAP

- BI Publisher supports queries against Lightweight Directory Access protocol (LDAP) data sources.

The screenshot shows the Oracle BI Publisher Administration interface. On the left, there's a navigation sidebar with tabs for JDBC, JNDI, File, LDAP, OLAP, and Web. The LDAP tab is selected. Below it, there are buttons for 'Add Data Source' and 'Data Source Name' (which is currently empty), and 'LDAP Conn' (which is also empty). In the main area, there's a sub-navigation bar with 'Administration > LDAP > Add Data Source'. The main form is titled 'Add Data Source' and has two tabs: 'General' and 'Security'. The 'General' tab contains fields for 'Data Source Name' (empty), 'LDAP Connection URL' (example: ldap://hostname:port), 'Username' (weblogic), 'Password' (redacted), and 'JNDI Context Factory Class' (example: com.sun.jndi.ldap.ldapCtxFactory). There's also a 'Test Connection' button. The 'Security' tab includes an 'Allow Guest Access' checkbox (unchecked), 'Available Roles' (BI Consumer, BI Content Author), and 'Allowed Roles' (empty). There are buttons for 'Move', 'Move All', 'Remove', and role selection arrows.

Setting Data Sources: OLAP

- BI Publisher supports Multidimensional Expressions (MDX) queries against your OLAP data sources.

The screenshot shows the SAP BI Publisher Administration interface. On the left, a sidebar titled "Administration" lists "Administration > OLAP" under "Data Sources". It includes tabs for JDBC, JNDI, File, LDAP, OLAP, and a partially visible "View". A button "Add Data Source" is highlighted. Below it, a table shows a single entry: "Data Source Name" is "OLAP C" and "Connection String" is "[server]". On the right, a larger window titled "Administration" is open. It has tabs for "General" and "Security". In the "General" tab, there is a tip message: "Please make sure to install SAP Java Connector API to use SAP BW OLAP Data Source." Below this, fields are configured: "Data Source Name" is empty, "OLAP Type" is set to "Oracle's Hyperion Essbase", "Connection String" is "[server]", "Username" is "weblogic", and "Password" is masked. A "Test Connection" button is present. In the "Security" tab, under "Allowed User", there is a checkbox "Allow Guest Access" which is unchecked. Under "Available Roles", "BI Consumer" and "BI Content Author" are listed. Under "Allowed Roles", roles can be moved between two lists: "Move All" from the left to the right, and "Remove" from the right back to the left. Buttons for "Move", "Move All", "Remove", and "Remove All" are available.

Setting Data Sources: Webservice

- BI Publisher supports connections to Webservices.

The screenshot shows the Oracle BI Publisher Administration interface. On the left, there's a navigation tree with 'Administration' at the top, followed by 'Administration > Web Services', 'Data Sources', and tabs for 'JDBC', 'JNDI', 'File', 'LDAP', and 'Web Services'. Below these tabs is a button 'Add Data Source' and a section for 'Data Source Name'. A red box highlights this section. To the right, the main window has a title bar 'Administration' with 'General' selected. The 'General' tab contains fields for 'Data Source Name' (empty), 'Server Protocol' (http), 'Server' (empty), 'Port' (80), 'URL Suffix' (empty), 'Session Timeout (Minutes)' (empty), 'Complex Type' (checked), 'WS-Security' (2002), 'Authentication Type' (XML Soap), 'Username' (weblogic), and 'Password' (redacted). Below this is a note about WSDL protected by HTTP basic auth. The 'Security' tab is also visible, showing role management with 'Available Roles' (BI Consumer, BI Content Author) and 'Allowed Roles' (empty). Buttons for 'Move', 'Move All', 'Remove', and 'Remove All' are available between the two lists. At the top right of the main window are buttons for 'Apply' and 'Cancel'.

Setting Data Sources: HTTP

- BI Publisher can connect to a HTTP Data Source

The screenshot shows the Oracle BI Administration interface for setting up a new data source. The left sidebar navigation includes 'Administration', 'Administration > HTTP', and 'Data Sources' with tabs for 'JDBC', 'JNDI', and 'File'. The 'File' tab is selected, and the 'Add Data Source' button is highlighted. The main panel title is 'Administration > HTTP > Add Data Source' with 'Add Data Source' and 'General' tabs. The 'General' tab is active, displaying fields for 'Data Source Name' (empty), 'Server Protocol' (set to 'http'), 'Server' (empty), 'Port' (set to '80'), 'Realm' (empty), 'Username' (set to 'weblogic'), and 'Password' (represented by a series of asterisks). Below the General tab is a 'Security' tab. Under 'Security', there is an 'Allow Guest Access' checkbox (unchecked). The 'Available Roles' section lists 'BI Consumer' and 'BI Content Author'. The 'Allowed Roles' section contains a list box with roles and a set of move buttons: 'Move', 'Move All', 'Remove', and 'Remove All'. The 'Apply' and 'Cancel' buttons are located in the top right corner of the main panel.

Viewing or Updating a Data Source

The screenshot shows the Oracle BI Administration interface for managing JDBC Data Sources. The left sidebar lists categories: Administration, Data Sources, JDBC (selected), JNDI, File, and LDAP. Under JDBC, it shows sub-categories: Add Data Source, Data Source Name, MYJDBC, and Oracle BI EE. A red box highlights the 'demo' entry under 'Data Source Name'. A blue arrow points from this entry to the main configuration panel on the right.

The main panel title is 'Update Data Source: demo'. It has tabs for General, Advanced, and Connection Test. The General tab is selected. It contains the following fields:

- Data Source Name: demo
- * Driver Type: Oracle 12c (selected from a dropdown menu)
- * Database Driver Class: oracle.jdbc.OracleDriver
(Example: oracle.jdbc.OracleDriver)
- * Connection String: jdbc:oracle:thin:@localhost:1521:orcl
- Use System User:
- * Username: oe
- Password: *****
- Pre Process Function: (empty)
- Post Process Function: (empty)
- Use Proxy Authentication
- Test Connection** button

At the top right of the main panel are 'Apply' and 'Cancel' buttons.

BI Publisher Security Model: Security Center

Security Center

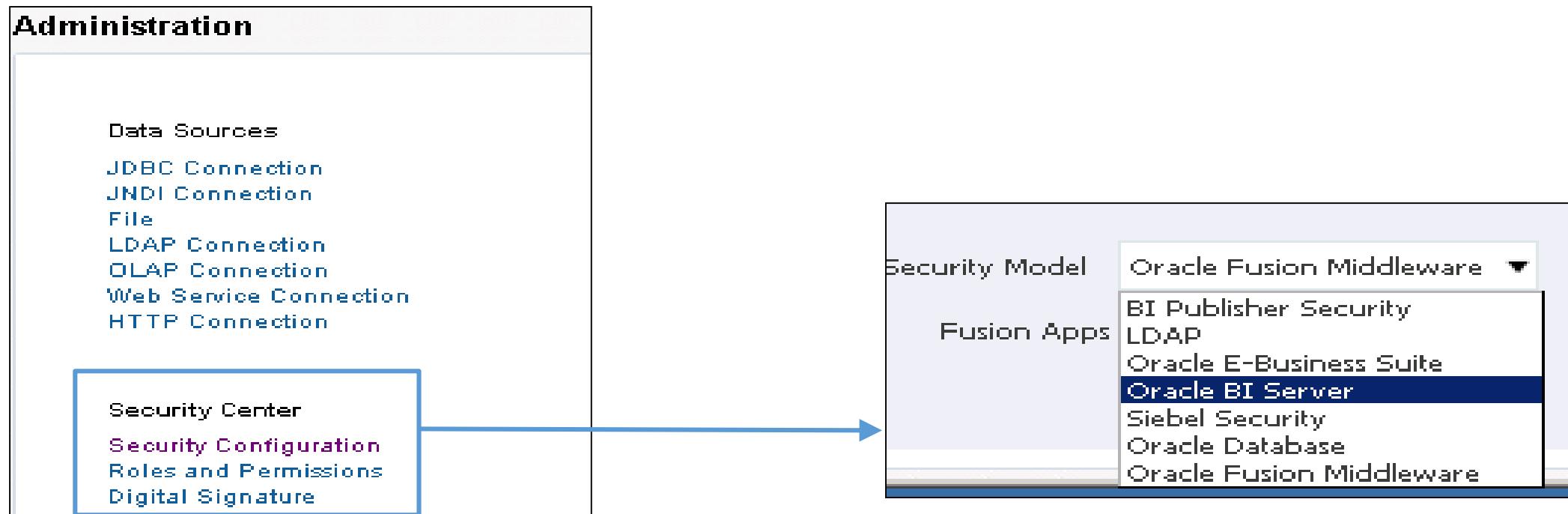
[Security Configuration](#)

[Roles and Permissions](#)

[Digital Signature](#)

BI Publisher: Supported Security Models

- The Security Configuration option allows you to select the suitable security model.



BI Publisher: Security Configuration

Administration Home Catalog New Open Signed In As **weblogic**

Security Center **Security Configuration** Roles and Permissions Digital Signature

TIP Any changes will only take effect after the application is restarted.

Local Superuser

Local superuser can log in to the system independent from the selected security model.

Enable Local Superuser

Superuser name
Password

Guest Access

Allow Guest Access

Guest Folder Name

Authentication

As an option, you can select either Single Sign-on or LDAP for your authentication method. To enable Single Sign-On, first set up BI Publisher as a partner application on the SSO Service below.

Use Single Sign-On

Single Sign-On Type Oracle Single Sign On

Single Sign-Off URL

How to get username HTTP Header

User Name Parameter

How to get user locale HTTP Header

How to get Parameters

Enter the value for URL, Administrator Username, Administrator Password, Distinguished Name for Users and other required information below

Use LDAP

URL
(Example:ldap://hostname:port)

Administrator Username

Administrator Password

Distinguished Name for Users
(Example:cn=Users,dc=example,dc=com)

JNDI Context Factory Class
(Default Value: com.sun.jndi.ldap.ldapCtxFactory)

Attribute used for Login Username
(Default Value: cn)

Attribute used for user matching with authorization system
(Example:ordquid)

Authorization

Security Model **Oracle Fusion Middleware**

Fusion Apps Security

This screenshot shows the Oracle BI Publisher administration interface under the 'Security Configuration' tab. It includes sections for Local Superuser (with an enable checkbox), Guest Access (with an allow checkbox), Authentication (with single sign-on and LDAP options), and Authorization (with security model and fusion apps security checkboxes). A note at the top indicates changes take effect after a restart. A tip message is also present.

Fusion Middleware Security for BI Publisher: Default User

- One default user is defined during installation:
 - AdministratorUser

The screenshot shows the Oracle WebLogic Server Administration Console 12c interface. The title bar reads "ORACLE WebLogic Server Administration Console 12c". The top navigation bar includes "Home", "Log Out", "Preferences", "Record", and "Help". The right side of the top bar displays "Welcome, weblogic | Connected to: bi_foundation". The left sidebar has sections for "Change Center" (with "View changes and restarts" and "Lock & Edit" buttons), "Domain Structure" (listing "bi.foundation" with sub-nodes like "Domain Partitions", "Environment", "Deployments", "Services", "Security Realms", "Interoperability", and "Diagnostics"), and "How do I..." (with links for "Manage users and groups", "Create users", "Modify users", and "Delete users"). The main content area is titled "Settings for myrealm" and shows the "Users and Groups" tab selected. Below it, the "Users" sub-tab is selected. A message states: "This page displays information about each user that has been configured in this security realm." A "Customize this table" link is present. A table titled "Users (Filtered - More Columns Exist)" lists four users:

<input type="checkbox"/>	Name	Description	Provider
<input type="checkbox"/>	BBERRY		DefaultAuthenticator
<input type="checkbox"/>	LCMLUser	This is the default service account for WebLogic Server Lifecycle Manager configuration updates.	DefaultAuthenticator
<input type="checkbox"/>	OracleSystemUser	Oracle application software system user.	DefaultAuthenticator
<input type="checkbox"/>	weblogic	This user is the default administrator.	DefaultAuthenticator

Fusion Middleware Security for BI Publisher: Default Users

- The default user is preconfigured with the following group:

The screenshot shows the Oracle WebLogic Server Administration Console 12c interface. The title bar reads "ORACLE WebLogic Server Administration Console 12c". The top navigation bar includes "Home", "Log Out", "Preferences", "Record", and "Help". The URL in the address bar is "Home > Summary of Security Realms > myrealm > Users and Groups > weblogic". On the left, there's a "Change Center" section with "View changes and restarts" and buttons for "Lock & Edit" and "Release Configuration". Below it is the "Domain Structure" tree, which includes "bi_foundation" and its sub-nodes: Domain Partitions, Environment, Deployments, Services, Security Realms, Interoperability, and Diagnostics. At the bottom left is a "How do I..." panel with a "Create users" link. The main content area is titled "Settings for weblogic" and has tabs for "General", "Passwords", "Attributes", and "Groups". The "Groups" tab is selected and highlighted with a blue border. A sub-instruction below says "Use this page to configure group membership for this user." Under "Parent Groups:", the "Available" list on the left includes "Administrators", "AppTesters", "CrossDomainConnect", "Deployers", "Monitors", "Operators", and "OracleSystemGroup". In the center, under "Selected", the "Administrators" checkbox is checked and highlighted with a blue border. To the right, a note states: "This user can be a member of any of these parent groups." A purple callout box points to the "Administrators" checkbox with the text: "Here, the weblogic user is preconfigured with Administrators group."

Default Users: BISystemUser Account

- The JDBC data source connecting to the Oracle BI EE Server:
 - Is preconfigured to use the installed Oracle BI EE Server
 - Uses the BISystemUser account

Administration > JDBC > Update Data Source: Oracle BI EE

Update Data Source: Oracle BI EE

General

TIP Please make sure to install the required JDBC driver classes.
TIP With Oracle Fusion Middleware Security Model, select the Use System User checkbox to use the BI System User for your BI Server Database Connection.

Data Source Name	Oracle BI EE
* Driver Type	Oracle BI Server
* Database Driver Class	oracle.bi.jdbc.AnalyticsJdbcDriver
* Connection String	jdbc:oracle:thin://EDVMR1P0:9514/
Use System User	<input checked="" type="checkbox"/>
* Username	
Password	
Pre Process Function	
Post Process Function	
<input checked="" type="checkbox"/> Use Proxy Authentication	
Test Connection	

Apply Cancel

Administration Configurations by Using BISystemUser Account

- Integration with Oracle BI Presentation Services:

The screenshot shows the Oracle BI Administration interface. The top navigation bar includes Home, Catalog, New, Open, Signed In As (set to weblogic), and a help icon. The main menu path is Administration > Oracle BI Presentation Services. The left sidebar has sections for Integration, Oracle BI Presentation Services (selected), and Server Configuration. A tip message states: "✓ TIP Any changes will only take effect after the application is restarted." The Server Configuration section contains the following settings:

Server Protocol	http
Server Version	v7
Server	EDVMR1P0
Port	9505
URL Suffix	analytics-ws/saw.dll (Default Value: analytics-ws/saw.dll)
Session Timeout (Minutes)	90

Buttons for Apply and Cancel are located in the top right corner of the configuration area. Below the configuration section is a BI Subject Area Metadata Cache section with a note about clearing the cache and a Clear button.

Fusion Middleware Security: Default Roles

- The default roles grant users certain privileges.
 - BIServiceAdministrator
 - BIContentAuthor
 - BIConsumer

The screenshot shows the Oracle Enterprise Manager Fusion Middleware Control 12c interface. The title bar reads "ORACLE Enterprise Manager Fusion Middleware Control 12c". The left sidebar shows a tree structure with "bi_foundation" selected under "WebLogic Domain". The main content area is titled "/Domain.bi_foundation/bi_foundation > Application Roles". It contains a section titled "Application Roles" with a sub-section "Policy Store Provider". Below this is a search bar with "Application Stripe" set to "obi" and a dropdown menu "Role Name Starts With". A table lists three application roles:

Role Name	Display Name	Description
BIServiceAdministrator	BI Service Administrator	This role confers privileges required to administer the sample application.
BIContentAuthor	BI Content Author	Users with this role can create most types of content.
BIConsumer	BI Consumer	Users granted this role can consume content but are restricted in what they can create.

Fusion Middleware Security: Default Publisher Permissions by Default Role

BIServiceAdministrator

oracle.bi.publisher.administerServer

BIContentAuthor

oracle.bi.publisher.developDataModel

oracle.bi.publisher.developReport

BIConsumer

oracle.bi.publisher.runReportOnline

oracle.bi.publisher.scheduleReport

oracle.bi.publisher.accessReportOutput

oracle.bi.publisher.accessExcelReportAnalyzer

oracle.bi.publisher.accessOnlineReportAnalyzer

Fusion Middleware Security: BIServiceAdministrator Role

The screenshot shows the Oracle BI Publisher Enterprise Administration interface. The top navigation bar includes the Oracle logo, the application name "BI Publisher Enterprise", a search bar, and links for "Administration", "Help", and "Sign Out". Below the navigation is a secondary header with "Administration" on the left and links for "Home", "Catalog", "New", "Open", "Signed In As", and "weblogic". The main content area is organized into several sections:

- Data Sources**: Includes links for JDBC Connection, JNDI Connection, File, LDAP Connection, OLAP Connection, Web Service Connection, and HTTP Connection.
- System Maintenance**: Includes links for Server Configuration, Scheduler Configuration, Scheduler Diagnostics, Report Viewer Configuration, and Manage Cache.
- Security Center**: Includes links for Security Configuration, Roles and Permissions, and Digital Signature.
- Runtime Configuration**: Includes links for Properties, Font Mappings, and Currency Formats.
- Delivery**: Includes links for Delivery Configuration, Printer, Fax, Email, WebDAV, HTTP, FTP, Content Server, and CUPS Server.
- Integration**: Includes a link for Oracle BI Presentation Services.

Fusion Middleware Security: BIContentAuthor Role

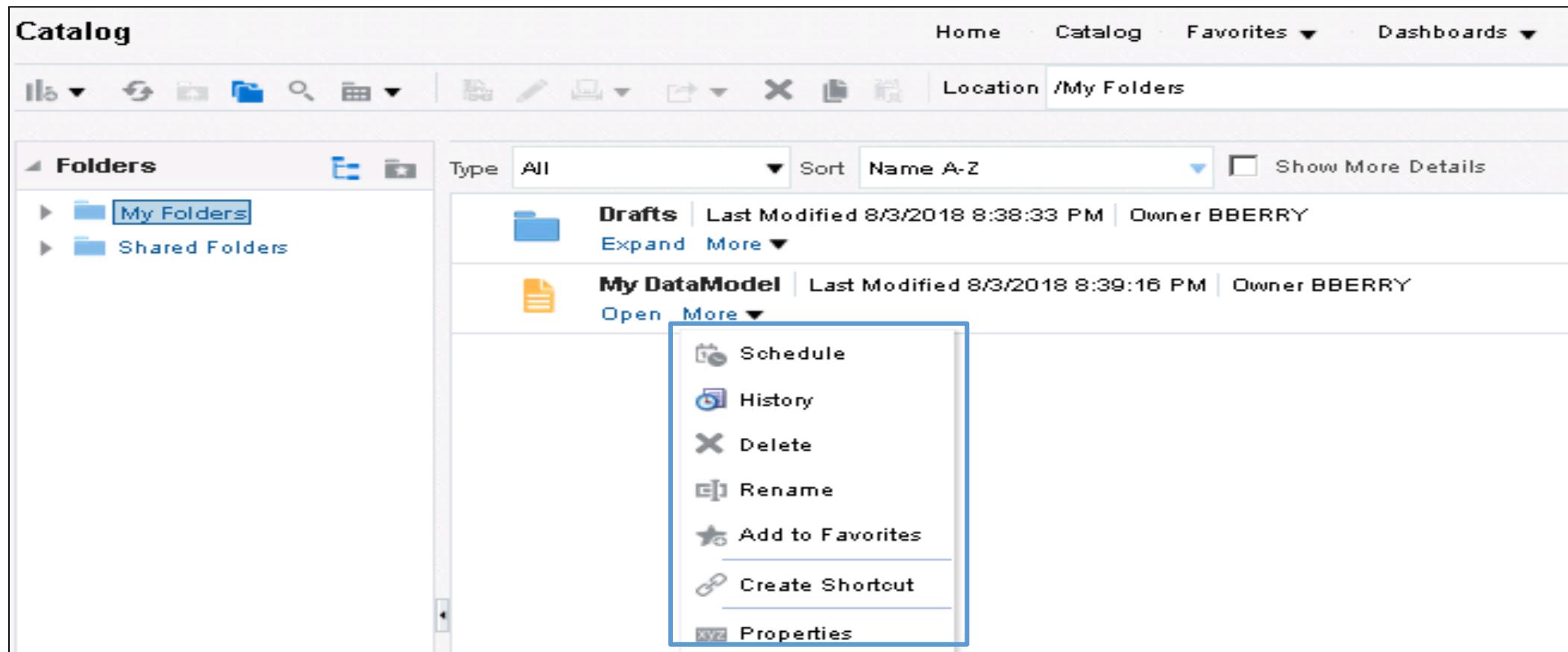
The screenshot shows the Oracle BI Publisher Enterprise application interface. The top navigation bar includes the ORACLE logo, BI Publisher Enterprise, Search (All), Administration, Help, and Sign Out. The main menu bar has Home, Catalog, New, Open, Signed In As (weblogic), and My Account.

The left sidebar contains a 'Create...' section with Report, Report Job, and Data Model options, and a 'Browse/Manage...' section with Catalog Folders, Report Jobs, and Report Job History.

The central area displays a 'Catalog' view with a tree view of Folders (My Folders, Temp, Drafts, Learn, weblogic, Shared Folders, Components) and a list of reports. The 'Learn' folder is expanded. The report 'Copy of My Salary Report' is selected, and a context menu is open over it, showing options: Add To Favorites, Delete, Copy, Cut, Rename, Download, Permissions, and Customize. The 'More' link in the 'Create...' section and the 'More' link in the context menu are both highlighted with blue boxes.

Name	Last Modified	Created By
Copy of My Salary Report	8/3/18 6:16 PM	weblogic
Emp_Report	8/2/18 9:19 PM	weblogic
My Airlines Report	8/3/18 12:26 AM	weblogic
My Revenue Report	8/3/18 12:27 AM	weblogic

Fusion Middleware Security: BIConsumer Role



BI Publisher Roles and Permissions

- The preconfigured roles and permissions for the authenticated user appear on this page.

The screenshot shows the 'Administration' interface with the 'Roles and Permissions' tab selected. The page displays three pre-configured roles: BI Consumer, BI Content Author, and BI Service Administrator, each with a brief description and an 'Add Data Sources' button.

Role Name	Description	Add Data Sources
BI Consumer	Users granted this role can consume content but are restricted in what they can create.	
BI Content Author	Users with this role can create most types of content.	
BI Service Administrator	This role confers privileges required to administer the sample application.	

BI Publisher Folder Permissions

The screenshot shows the BI Publisher Catalog interface. The left sidebar displays a tree view of Folders and Tasks. In the main area, a 'Permissions' dialog is open for a folder located at /My Folders/Learn/Emp_Report, owned by weblogic. The 'Accounts' section lists 'weblogic'. The 'Permissions' section shows a dropdown menu set to 'Custom' with options: Full Control, Modify, Open, Schedule Publisher Report, View Publisher Output, No Access, and Custom. A blue arrow points from the 'Custom' option in the dropdown to a 'Custom Permissions' dialog box. This dialog lists several permissions with checkboxes: Read (checked), Traverse (checked), Write (checked), Delete (checked), Change Permissions (unchecked), Set Ownership (unchecked), Run Publisher Report (checked), Schedule Publisher Report (checked), and View Publisher Output (checked). At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Catalog

Home Catalog Favorites Dashboards New Open

User View Location /My Folders/Learn

Folders

- My Folders
 - My Dashboard
 - Temp
 - Drafts
 - Learn**
 - weblogic
- Shared Folders
 - Components
 - Sample Lite
 - Subject Area Contents
 - Dashboards
 - KPIs
 - Published Reporting**
 - Analyses
 - Data Models
 - JDE Samples

Tasks

- RSS Unarchive
- Delete Upload
- Copy Properties
- Rename Permissions
- Create Shortcut

Permissions

Location: /My Folders/Learn/Emp_Report
Owner: weblogic

Permissions

Accounts	Permissions	Owner
weblogic	Custom	Read,Traverse,Write,Delete..

Custom

- Full Control
- Modify
- Open
- Schedule Publisher Report
- View Publisher Output
- No Access
- Custom

Apply permissions to sub-folders. Replace Options

Apply permissions to items within folder.

Custom Permissions

- Read
- Traverse
- Write
- Delete
- Change Permissions
- Set Ownership
- Run Publisher Report
- Schedule Publisher Report
- View Publisher Output

OK Cancel

BI Publisher Report Object Permissions

The screenshot shows the BI Publisher Catalog interface. On the left, there's a sidebar with sections for Folders (My Folders, Shared Folders, Tasks) and a main workspace for Catalog, Favorites, Dashboards, New, Open, and Signed In As weblogic.

In the center, a list of items is displayed under the heading "Folders". One item, "Learn", is selected. A context menu is open over "Learn", showing options like RSS, Delete, Copy, Rename, Create Shortcut, Archive, Unarchive, Upload, Properties, and Permissions. The "Permissions" option is highlighted with a blue arrow pointing to a detailed permissions dialog box.

The permissions dialog box shows the following details:

- Location: /My Folders/Learn
- Owner: weblogic
- Permissions table:

Accounts	Permissions
weblogic	Custom Full Control Modify Open Traverse No Access Custom

At the bottom of the permissions dialog, there are two checkboxes:

- Apply permissions to sub-folders.
- Apply permissions to items within folder.

Buttons at the bottom right include OK and Cancel.

Digital Signature: Overview

- BI Publisher supports digital signatures on PDF output documents.
 - Digital signatures enable you to verify the authenticity of the documents that you send and receive.
 - BI Publisher can access your digital ID file from a central, secure location, and at run time, sign the PDF output with the digital ID.

Registering a Digital Signature

Administration Home Catalog New Open Signed In As **weblogic** ?

Administration > Digital Signature

Security Center Security Configuration Roles and Permissions **Digital Signature**

Digital ID

* Digital ID File: **webloaic**
* Password: *********

Security

Available Roles Allowed Roles

BI Consumer BI Content Author

Move Move All Remove Remove All

Apply Cancel

The screenshot displays the Oracle BI Administration interface for managing digital signatures. The top navigation bar includes links for Home, Catalog, New, Open, and signed-in user weblogic. Below the navigation is a breadcrumb trail: Administration > Digital Signature. The main content area has tabs for Security Configuration, Roles and Permissions, and Digital Signature, with Digital Signature being the active tab. Under the Digital Signature tab, there are two sections: Digital ID and Security. The Digital ID section contains fields for a Digital ID File (set to 'webloaic') and a Password (represented by masked asterisks). The Security section contains tabs for Available Roles and Allowed Roles. Under Available Roles, 'BI Consumer' and 'BI Content Author' are listed in a dropdown menu. Under Allowed Roles, there is a list box and several control buttons: Move, Move All, Remove, and Remove All. At the bottom right of the interface are Apply and Cancel buttons.

Practice 8-1 and 8-2: Overview

- These practices cover the following topics:
 - Defining a file data source
 - Reviewing the roles assigned to your user ID

Delivery Options

The screenshot shows the Oracle BI Publisher Enterprise Administration interface. The top navigation bar includes 'Search All', 'Administration', 'Help', and 'Sign Out'. Below the navigation is a main menu with 'Administration' selected. The left sidebar contains links for 'Data Sources' (JDBC, JNDI, File, LDAP, OLAP, Web Service, HTTP), 'Security Center' (Configuration, Roles and Permissions, Digital Signature), and a 'Delivery' section which is highlighted with a blue border. The 'Delivery' section includes links for Delivery Configuration, Printer, Fax, Email, WebDAV, HTTP, FTP, Content Server, and CUPS Server. The right side of the screen displays sections for 'System Maintenance' (Server Configuration, Scheduler Configuration, Diagnostics, Report Viewer Configuration, Manage Cache), 'Runtime Configuration' (Properties, Font Mappings, Currency Formats), and 'Integration' (Oracle BI Presentation Services).

- Search All
- Administration
- Help
- Sign Out

Administration

Data Sources

- JDBC Connection
- JNDI Connection
- File
- LDAP Connection
- OLAP Connection
- Web Service Connection
- HTTP Connection

Security Center

- Security Configuration
- Roles and Permissions
- Digital Signature

Delivery

- Delivery Configuration
- Printer
- Fax
- Email
- WebDAV
- HTTP
- FTP
- Content Server
- CUPS Server

System Maintenance

- Server Configuration
- Scheduler Configuration
- Scheduler Diagnostics
- Report Viewer Configuration
- Manage Cache

Runtime Configuration

- Properties
- Font Mappings
- Currency Formats

Integration

- Oracle BI Presentation Services

Delivery: Delivery Configuration

- Use the Delivery Configuration page to set general properties for email deliveries from BI Publisher, and for defining your SSL certificate file.

The screenshot shows the 'Delivery Configuration' page within the Oracle BI Publisher administration interface. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (set to 'weblogic'), and a help icon. Below the navigation is a breadcrumb trail: Administration > Delivery Configuration. A 'Delivery' tab is selected, and the sub-tab 'Delivery Configuration' is highlighted in blue. A tip message at the top states, 'TIP Any changes will only take effect after the application is restarted.' The configuration section contains several input fields:

- SSL Certificate File: An empty text input field.
- Email From Address: An empty text input field with a placeholder '(Default Value: bippublisher-report@oracle.com)'.
- Delivery Notification Email From Address: An empty text input field with a placeholder '(Default Value: bippublisher-notification@oracle.com)'.
- Success Notification Subject: An empty text input field.
- Warning Notification Subject: An empty text input field.
- Failure Notification Subject: An empty text input field.
- Skipped Notification Subject: An empty text input field.
- Use System Proxy Settings: A checked checkbox indicated by a grey square.

At the bottom right are 'Apply' and 'Cancel' buttons.

Delivery: Print or Fax

- Printing is supported only through Internet Printing Protocol (IPP).

Administration Home Catalog New Open Signed In As weblogic

Administration > Printer > Add Server

Add Server Apply Cancel

General

* Server Name: * URI:
(Example: ipp://myhost:631/printers/myPrinter)
Filter: PDF to PostScript Filter Command: oracle.xdo.delivery.filter.PDF2PSFilterImpl
(Example: ps2ps {infile} {outfile})

Security

Username: weblogic Password:
Authentication Type: None Encryption Type: None

Proxy Server

Host: Port:
Username: Password:
Authentication Type: None

Delivery: Printing PDF

Administration Home Catalog New Open Signed In As weblogic

administration > Printer > Add Server

Add Server

General

* Server Name: * URI:
(Example: ipp://myhost:631/printers/myprinter)
Filter: PDF to PostScript Filter Command: oracle.xdo.delivery.filter.PDF2PSFilterImpl
(Example: ps2ps {infile} {outfile})
PDF to PostScript
PDF to PCL
None
Custom Filter

Security

Username: weblogic Password:
Authentication Type: None Encryption Type: None

Proxy Server

Host: Port:
Username: Password:
Authentication Type: None

Apply Cancel

Delivery: Email

- Email option:

The screenshot shows the Oracle WebLogic Administration Console interface. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (set to weblogic), and Help. The main title is "Administration > Email > Add Server". Below the title, the page title is "Add Server". On the right side, there are three buttons: "Test Connection", "Apply", and "Cancel". The configuration is divided into two tabs: "General" and "Security". The "General" tab is active, displaying fields for "Server Name" (with a required asterisk), "Port", "Host" (with a required asterisk), "Secure Connection" (set to "None"), and a dropdown menu. The "Security" tab shows "Username" set to "weblogic" and "Password" masked as "*****".

General	
* Server Name	<input type="text"/>
Port	<input type="text"/>
* Host	<input type="text"/>
Secure Connection	None

Security	
Username	weblogic
Password	*****

Delivery: WebDAV

Administration Home Catalog New Open Signed In As **weblogic** ?

Administration > WebDAV > Add Server

Add Server

General

* Server Name:
Port: * Host:
Filter Command:

Security

Username: Password:
Authentication Type: Encryption Type:

Proxy Server

Host: Port:
Username: Password:
Authentication Type:

Apply **Cancel**

Delivery: HTTP Server

Administration Home Catalog New Open Signed In As **weblogic** ?

Administration > HTTP > Add Server

Add Server **Apply** **Cancel**

General

* Server Name * URL
(Example: http://example.sample.com/)

Security

Username Password
Authentication Type Encryption Type

Proxy Server

Host Port
Username Password
Authentication Type

This screenshot shows the Oracle WebLogic Administration Console interface for adding a new HTTP server. The top navigation bar includes links for Home, Catalog, New, Open, and Signed In As (weblogic). The current path is Administration > HTTP > Add Server. The main form is titled 'Add Server' with 'Apply' and 'Cancel' buttons. The 'General' tab is active, containing fields for 'Server Name' and 'URL'. The 'Security' tab shows 'Username' (weblogic), 'Authentication Type' (None), 'Password' (redacted), and 'Encryption Type' (None). The 'Proxy Server' tab shows fields for 'Host', 'Port', 'Username', 'Password', and 'Authentication Type' (None).

Delivery: FTP Server

Administration

Administration > FTP > Add Server

Add Server

General

* Server Name: [] * Host: []

Port: [] Use Secure FTP:

Create files with Part extension when copy is in process: Use Passive Mode:

Filter Command: []

Security

Authentication Type: Password

Username: [] Private Key File: []

Password: [] Private Key Password: []

Proxy Server

Host: [] Port: []

Username: [] Password: []

Authentication Type: None ▾

Test Connection Apply Cancel

Delivery: Content Server

ORACLE® BI Publisher Enterprise

Administration Search All Administration Help Sign Out

Administration > Content Server > Add Server

Add Server Test Connection Apply Cancel

General

* Server Name * URI
(Example: http://hostport/cql/cql | OR) tachy/host:1444
| OR) http://hostport/tenantviews |

Security

Username weblogic Password *****

Additional Configuration

Enable Custom Metadata

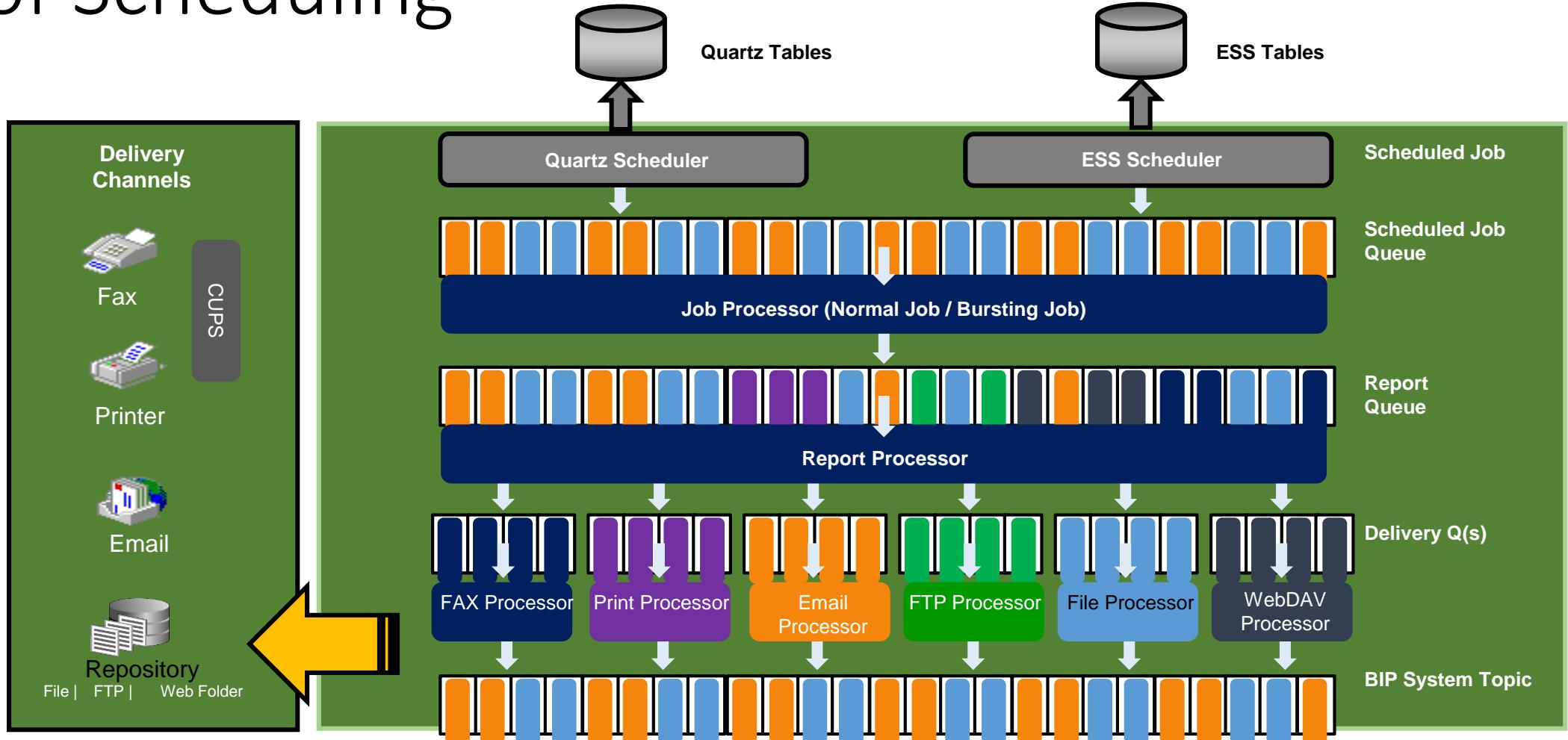
This screenshot shows the Oracle BI Publisher Enterprise administration interface. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (weblogic), and Sign Out. The main content area is titled 'Add Server' under 'Content Server'. It contains three tabs: General, Security, and Additional Configuration. The General tab has fields for 'Server Name' and 'URI'. The Security tab shows 'Username' as 'weblogic' and 'Password' as a masked string. The Additional Configuration tab has a checkbox for 'Enable Custom Metadata'. A toolbar at the top right includes 'Test Connection', 'Apply', and 'Cancel' buttons.

Delivery: CUPS Server

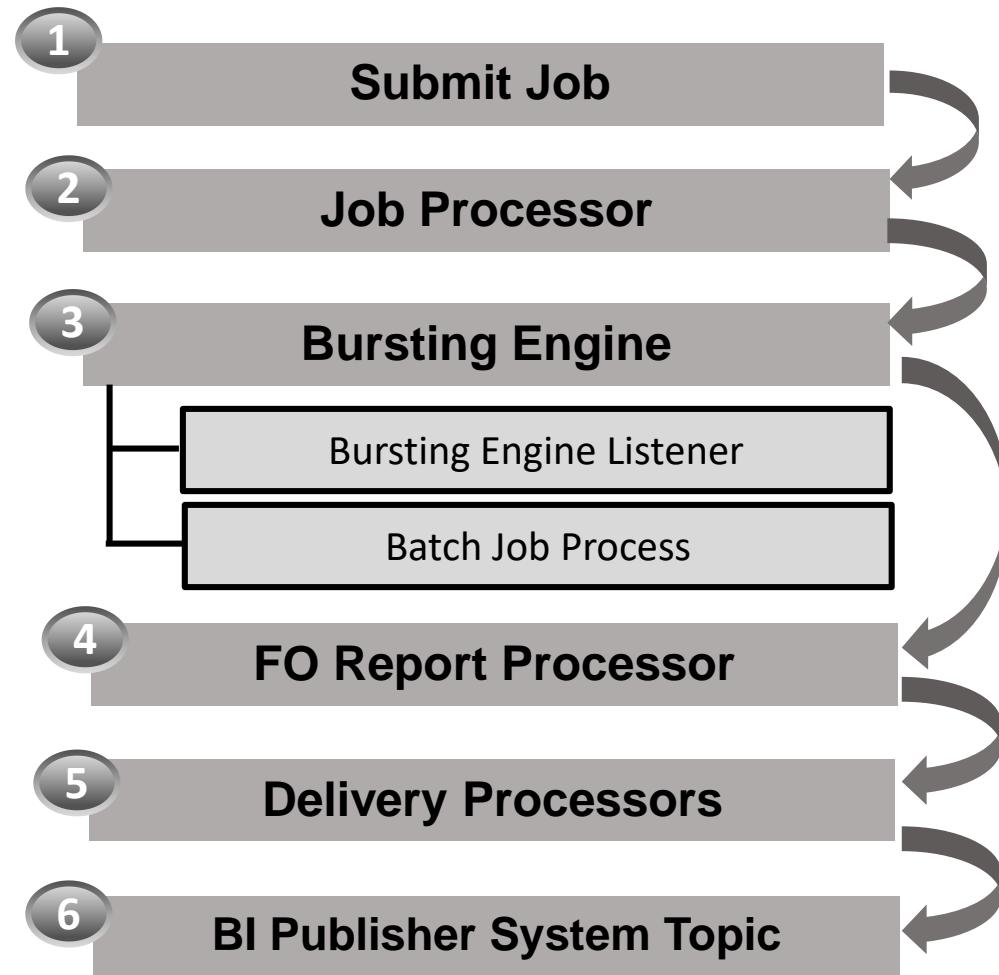
- CUPS Server option:

The screenshot shows the Oracle WebLogic Administration Console interface. The top navigation bar includes 'Administration', 'Home', 'Catalog', 'New ▾', 'Open ▾', 'Signed In As weblogic ▾', and a help icon. The left sidebar shows the path 'Administration > CUPS Server > Add Server'. The main content area is titled 'Add Server' and contains three input fields: '* Server Name' (empty), '* Host' (empty), and '* Port' (empty). At the bottom right are 'Apply' and 'Cancel' buttons.

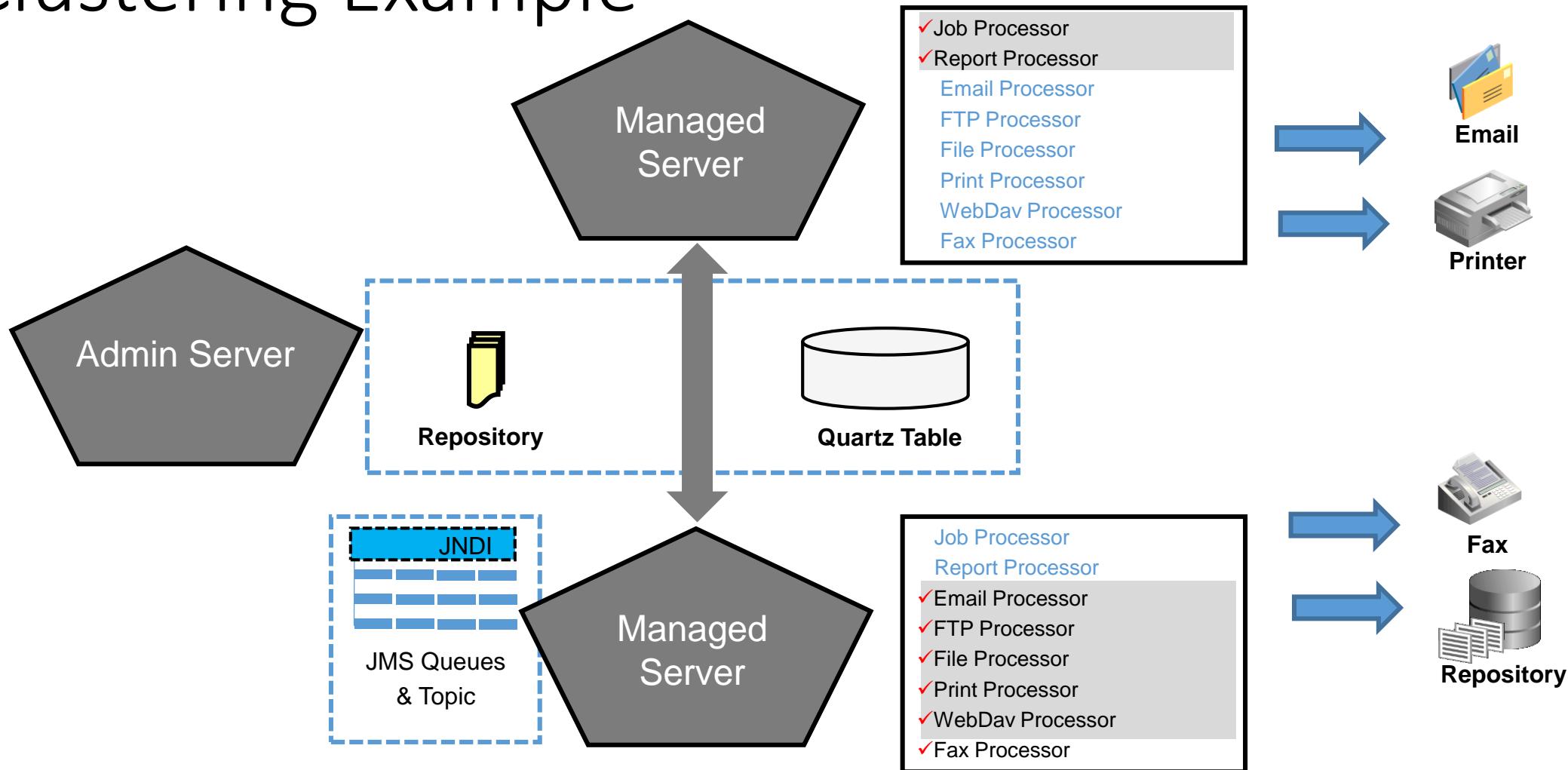
System Maintenance: Architecture Overview of Scheduling



BI Publisher Scheduler Process Flow



System Maintenance: Scheduling – Clustering Example



Scheduler Configuration: Overview

- BI Publisher Scheduler Configuration page:

The screenshot shows the Oracle BI Publisher Enterprise administration interface. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (weblogic), Help, and Sign Out. The main menu has tabs for Administration, Server Configuration, Scheduler Configuration, Scheduler Diagnostics, Report Viewer Configuration, and Manage Cache. The Scheduler Configuration tab is currently selected.

The configuration page is divided into several sections:

- Scheduler Selection:** A dropdown menu set to "Quartz". Below it are two checkboxes: Enable Public Output Option and Quartz Clustering.
- Database Connection:** A section for configuring database connections. It includes a dropdown for "Database Connection Type" set to "jndi", a text input for "JNDI Name" containing "jdbc/BIPublisherDatasource", and two buttons: "Test Connection" and "Install Schema".
- JMS Configuration:** A section for configuring JMS providers. It includes a dropdown for "JMS Provider" set to "WebLogic", a text input for "WebLogic JNDI URL" containing "cluster:t3://bi_cluster", a text input for "Threads Per JMS Processor" containing "5", and a text input for "Shared Directory". A "Test JMS" button is also present.

At the bottom right of the configuration area are "Apply" and "Cancel" buttons.

Scheduler Diagnostics: Overview

- The Scheduler Diagnostics page provides the runtime status of the Scheduler.

Diagnostic Item	Value	Status	Details
Enterprise Scheduler		Passed	
--JMS		Passed	
----JMS Cluster Config	D:/Oracle/Middleware/Oracle_Home/user_projects/domains/bi_foundation/bidata/components/bipublisher/repository/Admin/Scheduler/jms_cluster_config.properties	Passed	
-----JMS_PROVIDER_TYPE	WebLogic	Info	WebLogic JMS is selected.
-----JMS_WEBLOGIC_VERSION	10.3	Info	
-----JMS_WEBLOGIC_JNDI_FACTORY	weblogic.jndi.WLInitialContextFactory	Info	
-----JMS_WEBLOGIC_JNDI_URL	cluster:t3://bi_cluster	Info	
-----JMS_WEBLOGIC_SECURITY_MODE	Oracle BI	Info	weblogic
-----BIP_CONNECTION_FACTORY_NAME	BIP.JMS.CF	Info	
-----BIP_SYSTEM_TOPIC_NAME	BIP.System.T	Info	
-----BIP_BURST_JOB_QUEUE_NAME	BIP.Burst.Job.Q	Info	
-----BIP_BURST_REPORT_QUEUE_NAME	BIP.Burst.Report.Q	Info	
-----BIP_DELIVERY_FTP_QUEUE_NAME	BIP.Delivery.FTP.Q	Info	
-----BIP_DELIVERY_WCC_QUEUE_NAME	BIP.Delivery.WCC.Q	Info	
-----BIP_DELIVERY_FILE_QUEUE_NAME	BIP.Delivery.File.Q	Info	
-----BIP_DELIVERY_FAX_QUEUE_NAME	BIP.Delivery.Fax.Q	Info	
-----BIP_DELIVERY_WEBDAV_QUEUE_NAME	BIP.Delivery.WebDAV.Q	Info	
-----BIP_DELIVERY_PRINT_QUEUE_NAME	BIP.Delivery.Print.Q	Info	

Scheduler Diagnostics: Overview

- The Scheduler Diagnostics page provides information about the following components:
 - JMS
 - Cluster
 - Database
 - Quartz

Result: Passed	
Diagnostic Item	Value
Enterprise Scheduler	
--JMS	
----JMS Cluster Config	/scratch/kshekhar/bi/user_projects/ms_cluster_config.properties
----JMS_PROVIDER_TYPE	WebLogic
----NUMBER_THREADS_PER_PROCESSOR	5
----JMS_Shared_Temp_Directory	
----JMS Runtime	
-----Topic - BIP.System.T	
-----Queue - BIP.Burst.Job.Q	0 pending
--Cluster	
----Instance - adc2110437.1284570467943	
-----JMS Instance Config	/scratch/kshekhar/bi/user_projects/1.1.1.3.0/rww81x/war//WEB-INF/jr
-----JMSWrapper	Started (Tue Feb 22 16:25:40 PST 2011)
--Database	
----Database Config	/scratch/kshekhar/bi/user_projects/database-config.xml
-----Connection Type	jndi
----Toplink Config	/scratch/kshekhar/bi/user_projects/database-config.xml
-----Toplink Mapping File	META-INF/toplink_mappings.xml
----Database Schema	
--Quartz	
----Quartz Config	/scratch/kshekhar/bi/user_projects/

Report Viewer Configuration: Overview

- You can set the report viewer configuration on the Administration page under System Maintenance.

The screenshot shows the Oracle Reports Administration interface. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (weblogic), and Help. Below the navigation is a breadcrumb trail: Administration > Report Viewer Configuration. A sub-navigation bar labeled 'System Maintenance' contains tabs for Server Configuration, Scheduler Configuration, Scheduler Diagnostics, Report Viewer Configuration (which is highlighted in blue), and Manage Cache. On the left, a sidebar titled 'Properties' shows 'Report Viewer' is selected. The main content area displays a table with two columns: 'Server Value' and 'Default Value'. The 'Show Apply Button' row has a dropdown menu set to 'True' for both columns. At the bottom right are 'Apply' and 'Cancel' buttons.

	Server Value	Default Value
Show Apply Button	True ▾	True

Apply Cancel

Manage Cache

- Clearing Report Objects from the Server Cache

The screenshot shows the Oracle WebLogic Administration Console interface. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (weblogic), and a user icon. Below the navigation is a breadcrumb trail: Administration > Manage Cache. A secondary navigation bar under System Maintenance lists several tabs: Server Configuration (selected), Scheduler Configuration, Scheduler Diagnostics, Report Viewer Configuration, and Manage Cache. On the right side of this bar is a 'Return' button. The main content area has a blue header bar labeled 'Clear Object Cache'. Below it, a message reads 'Clear report object and data model object cache'. At the bottom left of this area is a blue rectangular button labeled 'Clear Object Cache'.

Runtime Configuration: Overview

- The Runtime Configuration page enables you to set runtime properties at the server level.

The screenshot shows the Oracle WebLogic Server Administration Console interface. The title bar reads "Administration". The top navigation bar includes links for "Home", "Catalog", "New", "Open", "Signed In As weblogic", and a help icon. The main content area is titled "Runtime Configuration" and has three tabs: "Properties" (selected), "Font Mappings", and "Currency Formats". On the left, a tree view shows "Properties" expanded, with "PDF Output" selected. The main panel displays a table with two columns: "Server Value" and "Default Value". The table rows represent various PDF output properties. The "Properties" section of the table is collapsed, showing the following expanded items:

	Server Value	Default Value
Compress PDF output	▼	True
Hide PDF viewer's menu bars	▼	False
Hide PDF viewer's tool bars	▼	False
Replace smart quotes	▼	True
Disable opacity and gradient shading for DVT chart	▼	False
Enable PDF Security	▼	False
Open document password	*****	
Modify permissions password		
Encryption level		High
Disable document modification	▼	False
Disable printing	▼	False
Disable adding or changing comments and form fields	▼	False
Disable context copying, extraction, and accessibility	▼	False
Enable text access for screen readers	▼	True
Enable copying of text, images, and other content	▼	False
Allowed change level		None
Allowed printing level		None

Buttons for "Apply" and "Cancel" are located in the bottom right corner of the table area.

Setting Runtime Properties

- Many of the Runtime properties for BI Publisher are shown here.

The screenshot shows the BI Publisher Administration interface for Runtime Configuration. The top navigation bar includes Home, Catalog, New, Open, Signed In As (weblogic), and a help icon. The main title is "Runtime Configuration". Below it, there are three tabs: Properties (selected), Font Mappings, and Currency Formats. A sidebar on the left lists categories: Properties, PDF Output, and several specific settings like "Compress PDF output" and "Hide PDF viewer's menu bars". The main content area is a table with columns "Server Value" and "Default Value". The table rows correspond to the settings in the sidebar. The "Properties" section has 10 rows, and the "PDF Output" section has 10 rows. The "Default Value" column contains values like True, False, and High. At the bottom right of the table are "Apply" and "Cancel" buttons. A red vertical line highlights the right edge of the table area.

	Server Value	Default Value
Properties		
PDF Output		
Compress PDF output	▼	True
Hide PDF viewer's menu bars	▼	False
Hide PDF viewer's tool bars	▼	False
Replace smart quotes	▼	True
Disable opacity and gradient shading for DVT chart	▼	False
Enable PDF Security	▼	False
Open document password	*****	
Modify permissions password		
Encryption level		High
Disable document modification	▼	False
Disable printing	▼	False
Disable adding or changing comments and form fields	▼	False
Disable context copying, extraction, and accessibility	▼	False
Enable text access for screen readers	▼	True
Enable copying of text, images, and other content	▼	False
Allowed change level		None
Allowed printing level	▼	None

Setting Runtime Properties PDF/A and PDF/X Output

- BI Publisher now supports PDF/A and PDF/X types of output.

PDF/A Output			
PDF/A ICC profile data			
PDF/A ICC profile info			sRGB IEC61966-2.1
PDF/A file identifier			
PDF/A document ID			
PDF/A version ID			
PDF/A rendition class			
PDF/X Output			
PDF/X ICC profile data			
PDF/X output condition identifier			
PDF/X output condition			
PDF/X registry name			http://www.color.org
PDF/X version			PDF/X-1a:2003
DOCX Output			

Defining Font Mappings

- BI Publisher has a font-mapping feature to map the fonts in RTF and

The screenshot shows the BI Publisher Administration interface. The top navigation bar includes Home, Catalog, New, Open, Signed In As (weblogic), and Help. The main content area is titled "Administration > Font Mappings". It displays two sections: "RTF Templates" and "PDF Templates".

RTF Templates: This section contains a table with four rows, each representing a font mapping for an RTF template. The columns are: Font Family, Style, Weight, Target Font Type, Target Font, and Delete.

Font Family	Style	Weight	Target Font Type	Target Font	Delete
Default Code 128	Normal	Normal	Truetype	128R00.TTF	
Default UPC-EAN	Normal	Normal	Truetype	UPCR00.TTF	
Default Micr MT	Normal	Normal	Truetype	MICR____.TTF	
Default BC 3of9	Normal	Normal	Truetype	B39R00.TTF	

PDF Templates: This section contains a table with three columns: Font Family, Target Font Type, and Target Font. It also includes an "Add Font Mapping" button.

Font Family	Target Font Type	Target Font	Delete

Creating a Font Mapping

The screenshot illustrates the process of creating a font mapping in the Oracle BI Administration interface.

Left Panel (Administration > Font Mappings):

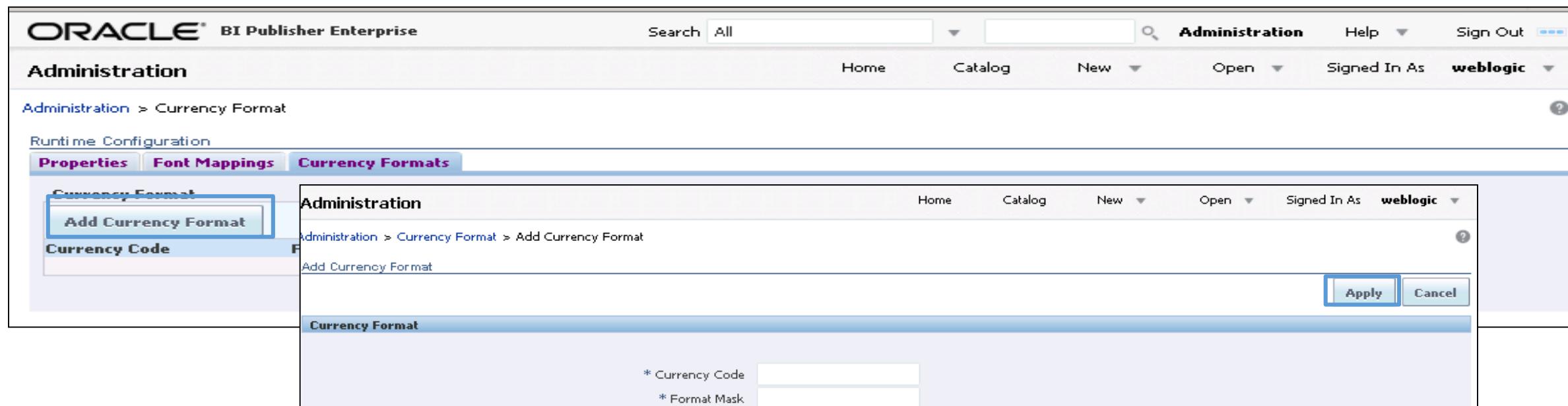
- RTF Templates:** Shows a table with four rows: Default Code 128, Default UPC-EAN, Default Micr MT, and Default BC 3of9. Each row has columns for Font Family, Style, and Weight.
- Add Font Mapping:** A button under RTF Templates.
- PDF Templates:** Shows a table with two columns: Font Family and Target Font Type. It also has an Add Font Mapping button.

Right Panel (Administration > Font Mappings > Add Font Mapping):

- Base Font:** Fields for * Base Font, * Style (Normal), and * Weight (Normal).
- Target Font:** Fields for * Target Font Type (Truetype) and * Target Font (128R00.TTF). A dropdown menu lists various font files:
 - 128R00.TTF
 - ALBANWTT.ttf
 - UPCR00.TTF
 - ADUOTCB.ttf
 - ADUOK.ttf
 - ADUOSCB.ttf
 - ALBANWTS.ttf
 - ADUOB.ttf
 - ADUO.ttf
 - ALBANWTK.ttf
 - ADUOJ.ttf
 - ADUOKB.ttf
 - ADUOSC.ttf
 - ADUOTC.ttf
 - ADUOBJ.ttf
 - ALBANWTJ.ttf
 - B39R00.TTF
 - ALBANYWT.ttf
- Buttons:** Apply and Cancel.

Defining Currency Formats

- Currency formats enable you to map a number format mask to a specific currency, so that your reports can display multiple currencies with their own corresponding formats.



Integrating with Oracle BI Presentation Services: Overview

The screenshot shows the Oracle BI Publisher Enterprise Administration interface. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (weblogic), Administration, Help, and Sign Out. The left sidebar is titled "Administration" and contains sections for Data Sources, Security Center, and Delivery. The main content area is divided into several sections: System Maintenance, Runtime Configuration, and Integration. The "Integration" section is highlighted with a blue box and contains the link "Oracle BI Presentation Services".

ORACLE® BI Publisher Enterprise

Search All

Administration Help Sign Out

Administration

Data Sources

- JDBC Connection
- JNDI Connection
- File
- LDAP Connection
- OLAP Connection
- Web Service Connection
- HTTP Connection

Security Center

- Security Configuration
- Roles and Permissions
- Digital Signature

Delivery

- Delivery Configuration
- Printer
- Fax
- Email
- WebDAV
- HTTP
- FTP
- Content Server
- CUPS Server

System Maintenance

- Server Configuration
- Scheduler Configuration
- Scheduler Diagnostics
- Report Viewer Configuration
- Manage Cache

Runtime Configuration

- Properties
- Font Mappings
- Currency Formats

Integration

- Oracle BI Presentation Services

Quiz: Overview

- This quiz examines your knowledge of the concepts discussed in the lesson.

Quiz

- Identify the data sources for which BI Publisher can be configured.
 - JDBC, JNDI, and email server
 - JDBC, JNDI, LDAP, OLAP, and file
 - JDBC, JNDI, LDAP, and OLAP only
 - Email server, HTTP, FTP, and Fax

Quiz

- Which of the following security models are supported for BI Publisher?
 - Server Security, SIEBEL, and OLAP
 - Oracle Fusion Middleware and Oracle Database
 - Oracle Fusion Middleware, BI Publisher, LDAP, Oracle BI Server, Oracle E-Business Suite, Oracle Siebel, and Oracle Database
 - LDAP, Siebel, Database, and OLAP

Quiz

- Users and groups are maintained outside of BI Publisher and they are created through the WebLogic Administration Console.
 - True
 - False

Quiz

- Scheduler Diagnostics enable you to view how many scheduled report requests have been received by the JMS queues.
 - a.True
 - b.False

Quiz

- In BI Publisher, runtime properties that are set at the server level take precedence over properties set at the report level.
 - a.True
 - b.False

Quiz

- Currency formatting is supported only for RTF and XSLFO templates.
 - a.True
 - b.False

Quiz

- When you install Oracle BI Enterprise Edition, the integration with BI Publisher is automatically configured. This means that the Oracle BI platform installer sets the Presentation Services host name, port, and URL suffix values.
 - True
 - False

Quiz

- BI Publisher can be integrated only with the BI Presentation services.
 - a.True
 - b.False

Practice 8-3: Overview

- In this practice, you will configure the Email server as a delivery option.

Summary

- In this lesson, you should have learned how to:
 - Describe BI Publisher administration tasks
 - Configure data sources
 - Identify BI Publisher supported security models
 - Configure security settings
 - Verify user roles and permissions
 - Configure delivery options
 - Verify the Scheduler configuration
 - Manage the runtime configuration
 - Configure the integration settings

9. Scheduling and Bursting Reports

Objectives

After completing this lesson, you should be able to:

- Schedule reports
- View report jobs and job history
- Edit and manage the scheduled reports
- Schedule a report with triggers
- Provide an overview of bursting
- Add a bursting definition
- Schedule reports for bursting
- View the details of job history when bursting is defined

Scheduling BI Publisher Reports

In BI Publisher Server, you can:

- Verify the Scheduler configuration
- Schedule reports
- View the saved output and history
- Edit and manage scheduled reports

Schedule Report Job: Overview

You can schedule a report job in many ways:

The screenshot shows the Oracle BI Publisher interface with several ways to schedule a report job highlighted by red boxes.

- Home Screen:** Under the "Create..." section, the "Report Job" icon is highlighted.
- Catalog View:** In the top navigation bar, the "Schedule" tab is highlighted for the "Company Sales Report".
- Context Menu:** A context menu is open over a report, with the "Schedule" option highlighted.
- Report Preview:** In the preview area, the "Salary Report - No Parameters" page has its own "Schedule" button.
- Report Job Context Menu:** A context menu for a report job shows the "Schedule" option highlighted.

Salary Report - No Parameters

Name	Job Title	Manager	Department	Salary
Donald O'Connell	Shipping Clerk	Kevin Mourgos	Shipping	2,600.0
Douglas Grant	Shipping Clerk	Kevin Mourgos	Shipping	2,600.0
Jennifer Whalen	Administration Assistant	Neena Kochhar	Administration	4,400.0
Michael Hartstein	Marketing Manager	Steven King	Marketing	13,000.0

General Options Tab

General options for report jobs:

The screenshot shows the 'Schedule Report Job' interface. At the top, there's a navigation bar with links for Home, Catalog, New, Open, Signed In As (weblogic), and a sign-out link. Below the navigation is a section titled 'Overview' with fields for General (Created by weblogic), Report Name (/Sample Lite/Published Reporting/Reports/Salary Report.xdo), and Schedule (Start immediately). To the right of these are buttons for Outputs, View bursting definition, Destination, and Notification. A 'Return' button and a 'Submit' button are also present. Below the overview is a tabbed menu with 'General' (selected), Output, Schedule, Notification, and Diagnostic tabs. The 'Report' field is set to /Sample Lite/Published Reporting and contains a magnifying glass icon. Under the 'Parameters' section, there are two dropdown menus: 'Department' set to All and 'Employee' set to All. Both of these dropdowns are highlighted with a red rectangle.

Output Options Tab

Schedule Report Job

Home Catalog New Open Signed In As weblogic

Return Submit

Outputs Output1

Destination

Notification

General Output Schedule Notification Diagnostic

General Output Schedule Notification Diagnostic

Make Output Public
 Save Data for Republishing

+ Output

Name	Layout	Format	Locale	Timezone	Calendar	Save Output
Output1	Simple	PDF	English (United States)	[GMT+00:00] Casablanca	Gregoria	<input checked="" type="checkbox"/>

Destination

There are five destination types: Email, Printer, Fax, FTP and Web folder. You can add multiple destinations as you need.

Destination Type Add Destination

This is an output without any bursting defined.

General Output Schedule Notification Diagnostic

Use Bursting Definition to Determine Output & Delivery Destination
 Make Output Public
 Save Data for Republishing

+ Output

Output is determined by bursting definition.

+ Destination

Destination is determined by bursting definition.

Schedule Options Tab

Schedule options:

Schedule Report Job

Home Catalog New Open Signed In As weblogic

Overview General Created by weblogic Report Name /Sample Lite/Published Reporting/Reports/Salary Report.xdo Schedule Start immediately

Outputs View bursting definition Destination Notification

Return Submit ?

General Output Schedule Notification Diagnostic

Define Schedule Time

Frequency Once

Run Now Once

Start 2:35:12 AM [GMT+00:00] Casablanca

Define Specific Dates

Use Trigger

Select Date and Time

November 2012

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	1
2	3	4	5	6	7	8

06 : 30 AM

[GMT+00:00] Casablanca

OK Cancel

The date picker allows you to select a date and a time zone.

Notification Options Tab

Notification options for report jobs:

The screenshot shows the 'Schedule Report Job' interface. At the top, there's a navigation bar with links for Home, Catalog, New, Open, Signed In As (weblogic), and buttons for Return and Submit. Below the navigation, there's an 'Overview' section with fields for General (Report Name: /Sample Lite/Published Reporting/Reports/Salary Report.xdo), Created by (weblogic), and a note that it was created 'Start immediately'. To the right of this are links for Outputs, View bursting definition, Destination, and Notification Email. The main content area has tabs for General, Output, Schedule, **Notification**, and Diagnostic. The Notification tab is active, showing settings for email notifications. Under 'Notify By', there's a checked checkbox for Email and an input field containing 'user@localhost'. Below this, under 'When', there are five checkboxes: Report completed (checked), Report completed with warnings (checked), Report failed (checked), and Report skipped (checked).

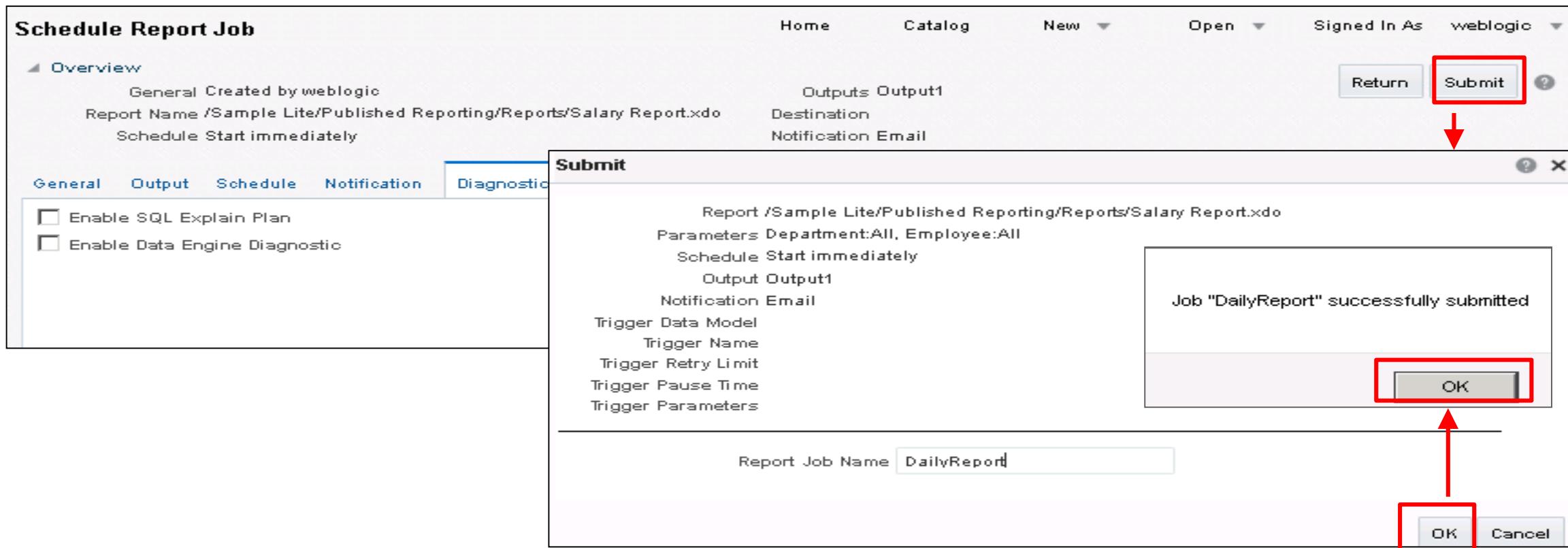
Diagnostic Tab

BI Publisher can generate a SQL Explain Plan.

The screenshot shows the 'Schedule Report Job' interface in BI Publisher. At the top, there are navigation links: Home, Catalog, New ▾, Open ▾, Signed In As (weblogic), and a user dropdown. Below the navigation is a section titled 'Overview' with fields for General (Created by weblogic), Report Name (/Sample Lite/Published Reporting/Reports/Salary Report.xdo), and Schedule Start immediately. To the right of these fields are buttons for Outputs (Output1), Destination, and Notification Email, along with 'Return' and 'Submit' buttons. A question mark icon is also present. Below the overview is a tab bar with tabs: General, Output, Schedule, Notification, and Diagnostic. The Diagnostic tab is selected and highlighted with a blue border. Under the Diagnostic tab, there are two checkboxes: 'Enable SQL Explain Plan' and 'Enable Data Engine Diagnostic'. The 'Enable SQL Explain Plan' checkbox is checked, while 'Enable Data Engine Diagnostic' is unchecked.

Submitting the Job and Reviewing the Confirmation Details

Submission:



Manage Report Jobs: Overview

The Manage Report Jobs page enables you to:

- View the recurring and currently running scheduled jobs
- Filter jobs displayed on the page
- See the jobs displayed in your own time zone
- Sort data by column names
- Monitor the status of a job
- Delete, suspend, or resume a job
- View job details
- Refresh the page to see the latest jobs and their corresponding statuses
- Edit the submitted jobs

Manage Report Jobs: Editing a Report Job

Typical view of a Manage Report Jobs page:

The screenshot shows the 'Manage Report Jobs' page with the following interface elements:

- Header:** Home, Catalog, New, Open, Signed In As weblogic.
- Time Zone:** Last Refreshed Aug 04, 2018 12:01:01 AM Western European Summer Time.
- Filters Section:** A red box highlights the filter area:
 - Report Job Name: Contains [text input]
 - Report Name: Contains [text input]
 - Status: All [dropdown]
 - Start Time: Equals Or Later Than [date/time input]
 - End Time: Equals Or Earlier Than [date/time input]
 - Owner: Equals [dropdown]
 - Scope: All [dropdown]
- Search and Reset Buttons:** Search, Reset.
- Report Jobs Section:** A blue box highlights the table:

Report Job Name	Report Name	Status	Start Time	End Time	Frequency	Owner	Scope	Edit	History
DailyJob	/Sample Lite/Published Reporting/Reports/Sala...	Active	Aug 04, 2018 01:00:00 AM		Single Job	weblogic	Public		History

A callout bubble points to the filters section with the text: "Filters to search a specific report job".

Manage Report Jobs: Editing a Report Job

Detailed view of an active report job:

Manage Report Jobs

Generated Fri Aug 03, 2018 11:04:05 PM Greenwich Mean Time

Home Catalog New Open Signed In As weblogic

Return ?

DailyJob

Report Job ID	1003
Owner	weblogic
Report Name	/Sample Lite/Published Reporting/Reports/Salary Report.xdo
Notification	Email when successful,Email when has warning,Email when failed,Email when skipped
Report Job Schedule	Once
Report Scope	Public
Active Start Date	Aug 4, 2018 12:00:00 AM GMT
Active End Date	
Trigger Data Model	
Trigger Name	
Trigger Retry Limit	
Trigger Pause Time	
Trigger Parameters	

Report Parameters

Employee	All
Department	All

Output & Delivery

Name	Format	Locale	Time Zone	Calendar
Output1	pdf	English (United States)	[GMT+00:00] Casablanca	Gregorian

Manage Report Jobs: Editing a Report Job

Editing the parameters display and schedule frequency:

The image displays two side-by-side screenshots of the Oracle BI Schedule Report Job interface.

Left Screenshot (Parameters):

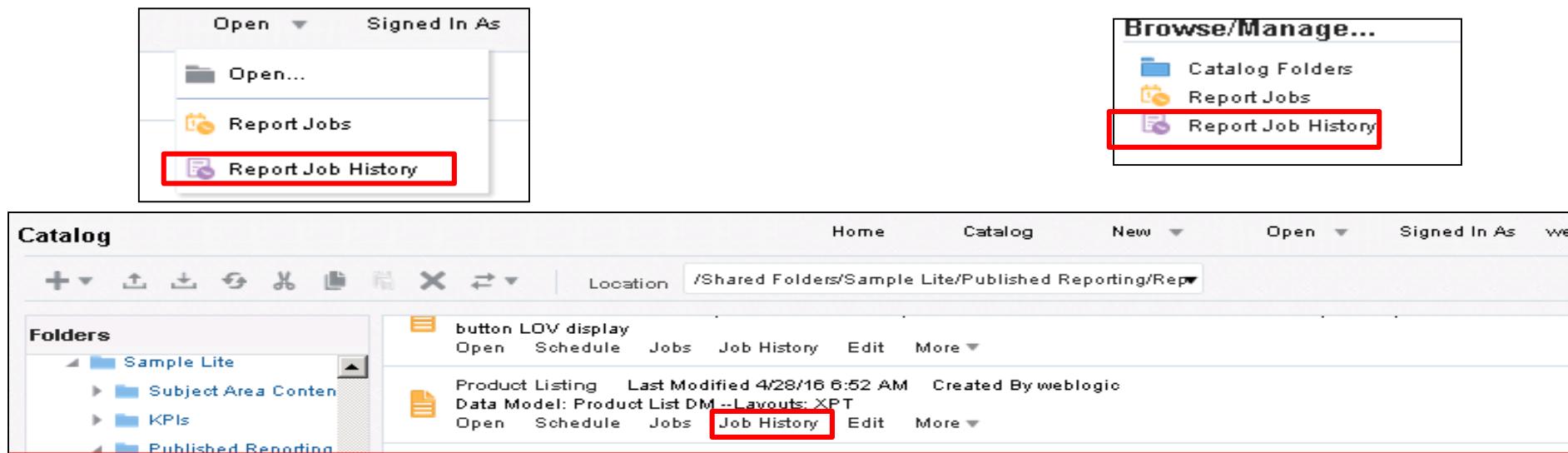
- Overview:** General Created by weblogic, Report Name /Sample Lite/Published Reporting/Reports/Salary Report.xdo, Schedule Start on Aug 4, 2018 12:00:00 AM.
- Outputs:** Output1
- Destination:** Notification
- Buttons:** Return, Submit, Submit As New, ?
- Report:** /Sample Lite/Published Reporting
- General Tab:** Selected.
- Output Tab:** Output
- Schedule Tab:** Selected.
- Notification Tab:** Notification
- Diagnostic Tab:** Diagnostic
- Parameters:** Department dropdown set to Marketing;Purchasing.
 - All
 - Administration
 - Marketing
 - Purchasing
 - Human Resources
 - ShippingSearch ... F12

Right Screenshot (Schedule):

- Overview:** General Created by weblogic, Report Name /Sample Lite/Published Reporting/Reports/Salary Report.xdo, Schedule Start immediately.
- Outputs:** Output1
- Destination:** Notification
- Buttons:** Return, Submit, **Submit As New**, ?, **?**
- Report:** /Sample Lite/Published Reporting
- General Tab:** General
- Output Tab:** Output
- Schedule Tab:** Selected.
- Notification Tab:** Notification
- Diagnostic Tab:** Diagnostic
- Define Schedule Time:** Frequency Once, Run Now **Run Now** (radio button selected), Start Aug 4, 2018 12:00:00 AM, [GMT+00:00] Casablanca
- Define Schedule Trigger:** Use Trigger

Report Job History: Overview

- The Report Job History page displays information about running and completed report jobs.
- You can access the Report Job History page, and then search for a specific report job history. You can also navigate to this page while viewing the report job history for a selected report from the catalog.



Report Job History: Overview

Select and click a report job name to view the details of scheduling and delivery.

Report Job History

Last Refreshed Sat Aug 04, 2018 12:14:29 AM Western European Summer Time

Time Zone used for filters and display [GMT+00:00] Casablanca

Filters

Report Job Name	Contains	Start Processing	Equals Or Later	Jul 28, 2018 12:14:29 AM	Owner	Equals	weblogic
Report Path	Contains	End Processing	Equals Or Earlier		Scope	All Histories	
Schedule Context	Contains	Status	All				

Report Job Histories

Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
DailyJobNow	Salary Report.xdo	Success	Aug 04, 2018 12:09:12 AM	Aug 04, 2018 12:09:12 AM	weblogic	Public
DailyReport	Salary Report.xdo	Success	Aug 03, 2018 11:55:17 PM	Aug 03, 2018 11:55:18 PM	weblogic	Private

[2 Total Report Output]

Report Job History: Details

- The selected report job is displayed.
- You can explore the Output and Delivery table results to get more details.

The screenshot shows the 'Report Job History' details page. On the left, a sidebar lists 'Report Job Histories' with entries for 'DailyJobNow' and 'DailyReport'. The 'DailyJobNow' entry is highlighted with a red box and an arrow points from it to the main content area. The main content area displays the following information:

General Information

Report Job ID	1005
Report Job Name	DailyJobNow
Owner	weblogic
Report Name	Salary Report
Report Scope	Public
Report Job Schedule	8/4/18 12:09:12 AM WEST
Active Start Date	
Active End Date	
Trigger Data Model	
Trigger Name	
Trigger Retry Limit	
Trigger Pause Time	
Trigger Parameters	

Report Job Execution Information

Report Job Status	Success
Start Processing Time	8/4/18 12:09:12 AM WEST
End Processing Time	8/4/18 12:09:12 AM WEST
Time Elapsed	0.578 seconds

Report Parameters

Employee	All
Department	Marketing;Purchasing

Output & Delivery

XML Data Diagnostic Log Republish

Status	All						
Output Name	Template	Format	Locale	Time Zone	Calendar	Status	Send
Output1	Simple	PDF	English (United States)	[GMT+00:00] Casablanca	Gregorian	✓	

Downloading and Republishing

Output and delivery details for job history:

Report Job History

Last Refreshed Fri Aug 03, 2018 11:16:27 PM Western European Summer Time

Home Catalog New Open Signed In As weblogic Return ?

General Information

Report Job ID	1005
Report Job Name	DailyJobNow
Owner	weblogic
Report Name	Salary Report
Report Scope	Public
Report Job Schedule	8/4/18 12:09:12 AM WEST
Active Start Date	
Active End Date	
Trigger Data Model	
Trigger Name	
Trigger Retry Limit	
Trigger Pause Time	
Trigger Parameters	

Report Job Execution Information

Report Job Status	Success
Start Processing Time	8/4/18 12:09:12 AM WEST
End Processing Time	8/4/18 12:09:12 AM WEST
Time Elapsed	0.578 seconds

Output Delivery

Download the data.

Download Explain Plan.

Republish the report.

XML Data Diagnostic Log Republish

Status	All						
Output Name	Template	Format	Locale	Time Zone	Calendar	Status	Send
Output1	Simple	PDF	English (United States)	[GMT+00:00] Casablanca	Gregorian	✓	

Sending the Output to a New Destination

Report Job History

Last Refreshed Fri Aug 03, 2018 11:16:27 PM Western European Summer Time

General Information

Report Job ID	1005
Report Job Name	DailyJobNow
Owner	weblogic
Report Name	Salary Report
Report Scope	Public
Report Job Schedule	8/4/18 12:09:12 AM WEST
Active Start Date	
Active End Date	
Trigger Data Model	
Trigger Name	
Trigger Retry Limit	
Trigger Pause Time	
Trigger Parameters	

Report Job Execution Information

Report Job Status	Success
Start Processing Time	8/4/18 12:09:12 AM WEST
End Processing Time	8/4/18 12:09:12 AM WEST
Time Elapsed	0.678 seconds

Report Parameters

Employee	All
Department	Marketing,Purchasing

Output & Delivery

XML Data Diagnostic Log Republish

Status	All
Output Name	Output1
Template	Simple
Format	PDF
Locale	English (United States)
Time Zone	[GMT+00:00] Casablanca
Calendar	Gregorian
Status	Send

Send

There are five destination types: Email, Printer, Fax, FTP and Web folder. You can add multiple destinations as you need.

Destination Type Email Add Destination

Email

Email

*To:

Cc:

Reply to:

Subject:

Message:

Scheduling a Report with Trigger: Overview

- The execution of a scheduled report job can now be conditionally based on an event.
- You will need to include a Schedule Trigger in the Data Model of the report. When the report job is scheduled to run, the trigger is executed.

Setting a Schedule Trigger

To enable a schedule trigger, perform the following:

1. Review the data model that contains the trigger.
2. Create a job that uses the trigger.
3. Choose the trigger.
4. Submit the job.
5. Open Report Job History.

Reviewing the Data Model That Contains the Trigger

The screenshot shows the DMTrigger application interface. The left sidebar lists various data models: employees, Event Triggers (with salaryTrig selected), Flexfields, List of Values, deptList, empList, Parameters (dept, emp, sal), and Bursting. The main area displays the 'Event Triggers' list, which includes a table with columns: *Name, Type, Language, and Reorder. A new trigger 'salaryTrig' is listed with 'Schedule' as the type and 'SQL Query' as the language. Below the table, a callout box points to the 'salaryTrig' entry with the text: 'Open the data model and select the trigger.' To the right, a detailed view for 'salaryTrig' is shown under 'Language: SQL Query'. It includes an 'Options' section with a 'Cache Result' checkbox, a 'Data Source' dropdown set to 'demo', and an 'SQL Query' text area containing the code: 'select 1 from dual where :sal > 2000'.

DMTrigger

Home Catalog New Open

Manage Private Data Sources | View Data

Data Model

Properties

- Data Sets
 - employees
- Event Triggers
 - salaryTrig
- Flexfields
- List of Values
 - depList
 - empList
- Parameters
 - dept
 - emp
 - sal
- Bursting

Event Triggers

*Name	Type	Language	Reorder
salaryTrig	Schedule	SQL Query	▲▼

Open the data model and select the trigger.

salaryTrig: Language: SQL Query

Options Cache Result

Data Source demo

SQL Query

```
select 1 from dual where :sal > 2000
```

Creating a Job That Uses a Trigger

The screenshot illustrates the process of creating a scheduled report job in Oracle BI EE.

Step 1: Navigating to the Report Job Page

The left panel shows a navigation menu with options: New, Open, Report, Report Job (highlighted with a red box), Data Model, Style Template, and Sub Template. An arrow points from the "Report Job" option to the main "Schedule Report Job" page on the right.

Step 2: Overview Page

The main page displays the "Schedule Report Job" configuration. The "General" tab is selected. Key details shown include:

- Report Name: /Sample Lite/Published Reporting/Reports/Salary Report.xdo
- Schedule: Start immediately
- Outputs: View bursting definition
- Destination: Notification

A search bar for "Report" is present, with the value "/Sample Lite/Published Reporting" highlighted by a red box. Below it, parameters are set to Department: Marketing;Purchasing;Hum and Employee: All.

Step 3: Schedule Tab Configuration

The "Schedule" tab is selected. The "Define Schedule Time" section includes:

- Frequency: Once
- Run Now: Selected (radio button)
- Start: Aug 4, 2018 11:54:45 PM
- Time Zone: [GMT+00:00] Casablanca

The "Define Schedule Trigger" section contains a checkbox labeled "Use Trigger", which is highlighted with a red box.

Choosing the Trigger and Submitting the Job

Schedule Report Job

Home Catalog New Open Signed In As weblogic

General Created by weblogic
Report Name /Sample Lite/Published Reporting/Reports/Salary Report.xdo
Schedule Start immediately

Outputs Output1
Destination
Notification

Return Submit

Overview

General Output Schedule Notification Diagnostic

Define Schedule Time

Frequency Once

Run Now

Start Aug 4, 2018 11:54:45 PM

Define Schedule Trigger

Use Trigger

A schedule trigger allows you to conditionally execute an occurrence of a job. When the schedule time occurs, the schedule trigger is checked. If the schedule trigger returns data, the job will proceed. If no data is returned the occurrence of that job is skipped.

Retry Limit 1

Pause Time 1 Minute(s)

Data Model Use Data Model specified in the report /~weblogic/Learn/DMTrigger.xdm

Trigger salaryTrig

Parameters salaryTrig

Schedule Report Job

Home Catalog New Open Signed In As weblogic

General Created by weblogic
Report Name /Sample Lite/Published Reporting/Reports/Salary Report.xdo
Schedule Start immediately

Outputs Output1
Destination
Notification

Return Submit

Overview

General Output Schedule Notification Diagnostic

Define Schedule Time

Frequency Once

Run Now

Start Aug 4, 2018 11:54:45 PM [GMT+00:00] Casablanca

Define Schedule Trigger

Use Trigger

A schedule trigger allows you to conditionally execute an occurrence of a job. When the schedule time occurs, the schedule trigger is checked. If the schedule trigger returns data, the job will proceed. If no data is returned the occurrence of that job is skipped.

Retry Limit 1

Pause Time 1 Minute(s)

Data Model Use Data Model specified in the report /~weblogic/Learn/DMTrigger.xdm

Trigger salaryTrig

Parameters salary 2000

Opening Job Histories

The screenshot shows the Oracle BI interface with the following details:

Top Left Panel: A sidebar with "Open" dropdown and "Signed In As" section. Options include "Open...", "Report Jobs", and "Report Job History".

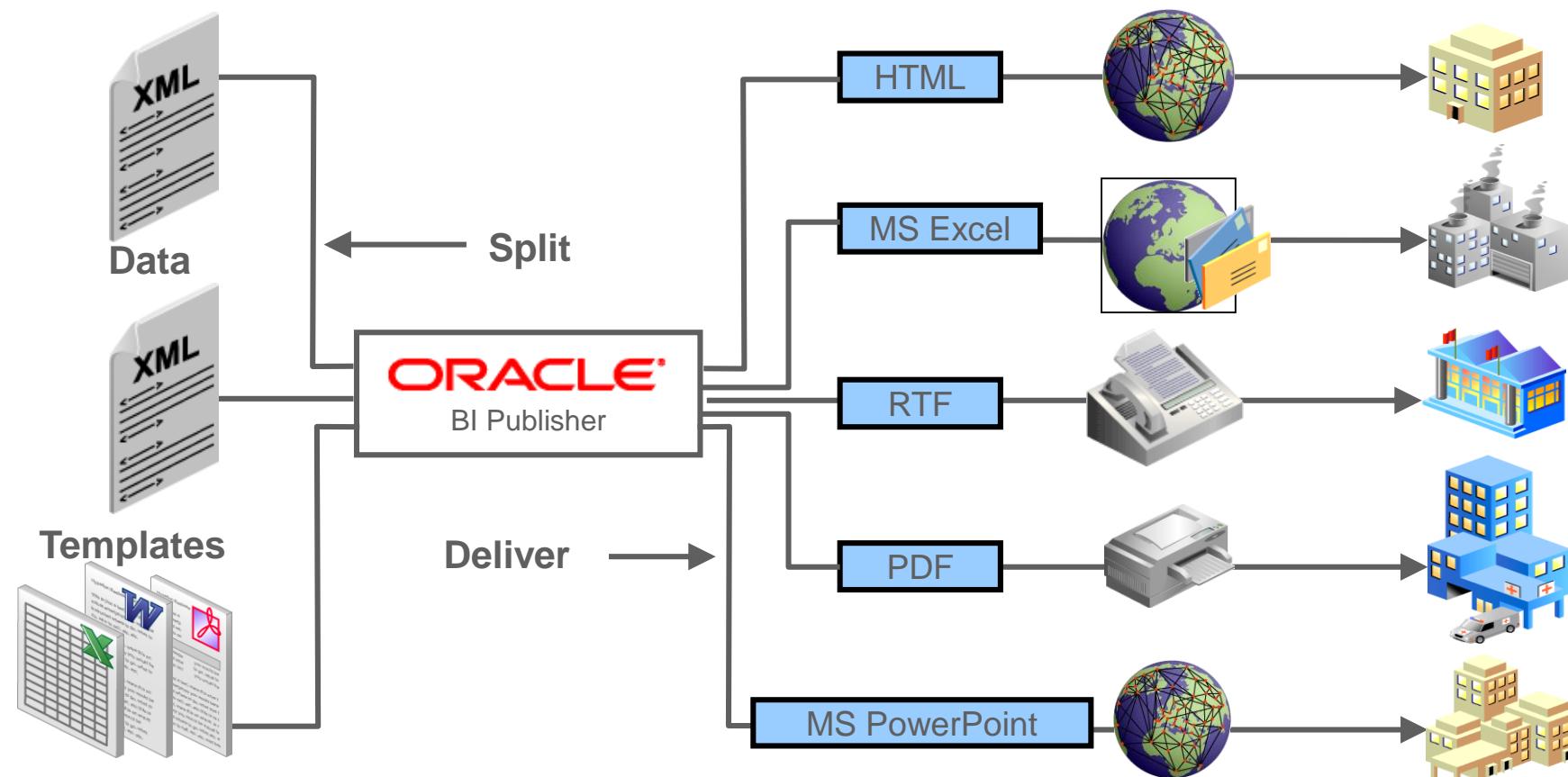
Main Screen: "Report Job History" page.

- Header:** Home, Catalog, New, Open, Signed In As (weblogic).
- Time Zone:** Last Refreshed Sat Aug 04, 2018 11:10:25 PM Western European Summer Time.
- Filters:** Report Job Name (Contains), Start Processing (Equals Or Later), Jul 28, 2018 11:10:25 PM, Owner (Equals), Report Path (Contains), End Processing (Equals Or Earlier), Scope (All Histories), Schedule Context (Contains), Status (All). Buttons: Search, Reset.
- Report Job Histories:** A table titled "[4 Total Report Output]".

Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
Skipped	Salary Report.xdo	Skipped	Aug 04, 2018 11:09:34 PM	Aug 04, 2018 11:09:34 PM	weblogic	Public
DailyJob	Salary Report.xdo	Success	Aug 04, 2018 01:00:00 AM	Aug 04, 2018 01:00:00 AM	weblogic	Public
- Callout:** A purple callout points to the "Skipped" status in the first row of the table, with the text "This job was skipped."

Bursting a Report

Bursting is the process of generating multiple documents from the same report, and delivering each document to a different destination.



Bursting: Key Concepts

A bursting definition is a component of the data model. After you define the data sets for the data model, you can set up one or more bursting definitions. When you set up a bursting definition, you define the following:

- Split By key
- Deliver By key
- Delivery query

The screenshot shows a software interface for defining data models, specifically focusing on a bursting definition. The top navigation bar includes tabs for 'Diagram', 'Structure' (which is selected), and 'Code'. Below this, there are two main panes: 'Table View' on the left and 'XML View' on the right.

Table View: This pane displays the 'Data Source' hierarchy. A red box highlights the 'Office Sales – Bi Server' node, which contains several child nodes: D1 OFFICE, D4 COMPANY, D3 ORGANIZATION, D2 DEPARTMENT, R3 ORDER CURRENCY, 1- REVENUE, and 2- BILLED QUANTITY.

XML View: This pane lists XML tags corresponding to the data source structure. The columns are 'XML Tag Name' and 'Sorting'. The sorting column for each row contains a blue downward arrow icon, except for the first row where it is red. A red circle highlights the sorting icon for the 'OFFICE' row.

XML Tag Name	Sorting
DATA_DS	
G_1	
OFFICE	▼ (highlighted)
G_2	
COMPANY	▼
ORGANIZATION	▼
DEPARTMENT	▼
ORDER_CURRENCY	▼
REVENUE	▼
BILLED_QUANTITY	▼

Adding a Bursting Definition

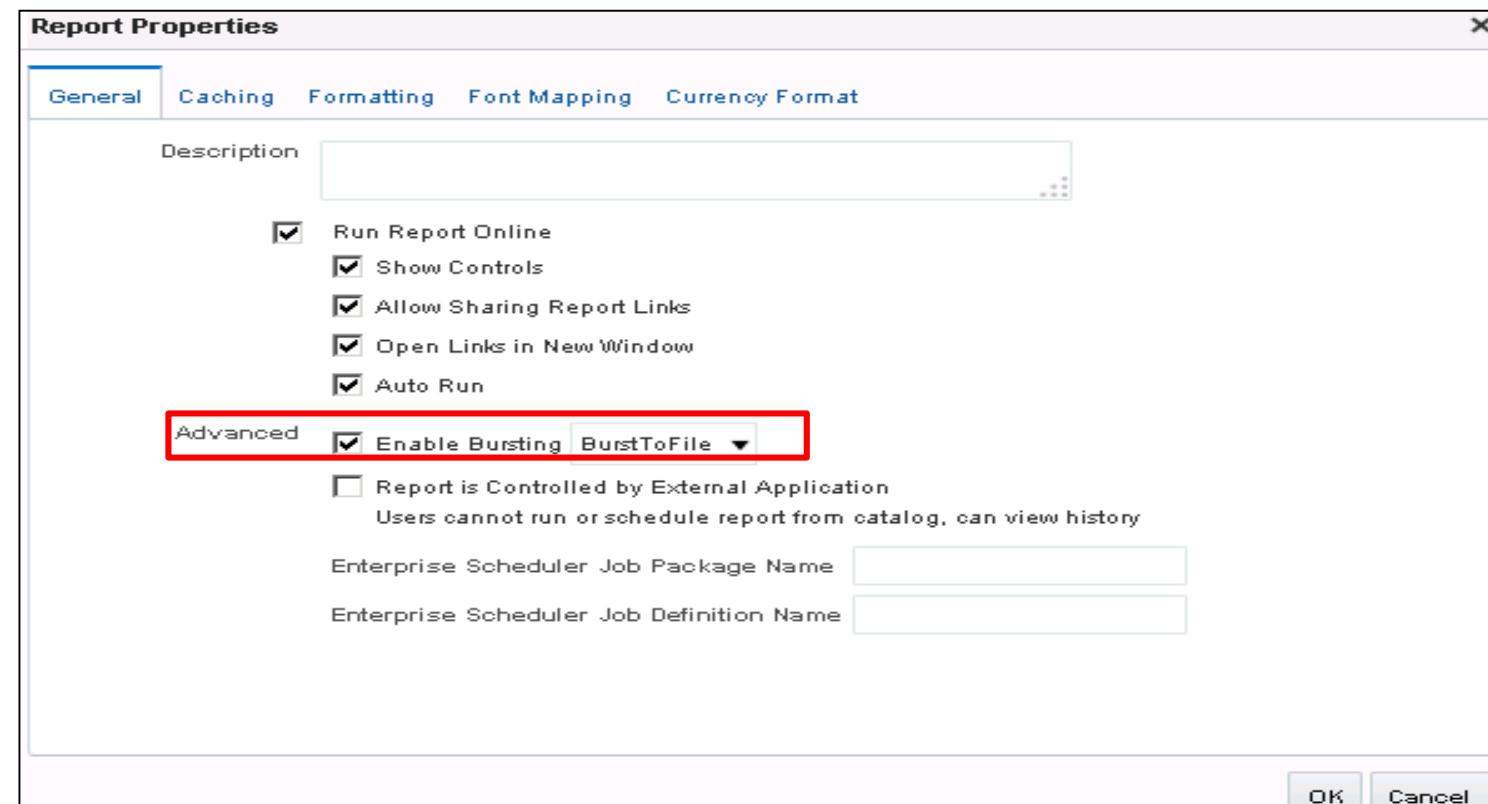
Adding a bursting definition where the data set is already defined:

The screenshot shows the Oracle Data Modeler application window titled "BurstingDM". The left sidebar lists various data model components under "Data Model", including "Properties", "Data Sets" (with entries like "employees", "deptList", "empList"), "Event Triggers", "Flexfields", "List of Values", "Parameters" (with entries like "dept", "emp"), and "Bursting" (which is highlighted with a red box). The main workspace displays a "Bursting" section with a "+" icon. A callout bubble points to this icon with the text "Create New Bursting icon". Below this, a "BurstToFile" configuration panel is shown with fields for "Source" (set to "SQL Query") and "Actions" (set to "demo"). The "BurstToFile" panel also includes settings for "Split By" and "Deliver By", both set to "/ROWSET/ROW/DEPARTME". The SQL query for the bursting definition is displayed in a code editor:

```
select
d.department_name KEY,
'SimpleRTF' TEMPLATE,
'RTF' TEMPLATE_FORMAT,
'en-US' LOCALE,
'PDF' OUTPUT_FORMAT,
'FILE' DEL CHANNEL,
'D:\TEMP\PARAMETER1,
d.department_name || '.pdf' PARAMETER2
from departments d
```

Enabling a Report to Use a Bursting Definition

Use the Report Properties Option of Report Editor to enable a report to use a bursting definition.



Scheduling a Bursting Job

Selecting the bursting option while scheduling a report:

The screenshot shows two instances of the 'Schedule Report Job' interface side-by-side.

Left Instance (Bursting Disabled):

- General Tab:** Report Name: /Sample Lite/Published Reporting/Reports/Salary Report.xdo, Schedule Start: immediately.
- Output Tab:** Contains a checkbox for 'Save Data for Republishing' which is checked. A callout bubble says: "The bursting option is not enabled."
- Destination Tab:** Shows 'Output1' selected under 'Layout'.

Right Instance (Bursting Enabled):

- General Tab:** Report Name: ~/weblogic/Learn/BurstRD.xdo, Schedule Start: immediately.
- Output Tab:** Contains a checkbox for 'Use Bursting Definition to Determine Output & Delivery Destination' which is checked. A callout bubble says: "The bursting option is enabled."
- Destination Tab:** Shows 'View bursting definition' selected under 'Delivery'.

Viewing Report Job History After Bursting

Report Job History

Last Refreshed Sat Aug 04, 2018 10:45:48 PM Western European Summer Time

Home Catalog New Open Signed In As weblogic

Return ?

General Information

General Information

Report Job ID	1010
Report Job Name	Burst
Owner	weblogic
Report Name	BurstRD
Report Scope	Private
Report Job Schedule	8/4/18 11:44:41 PM WEST
Active Start Date	
Active End Date	
Trigger Data Model	
Trigger Name	
Trigger Retry Limit	
Trigger Pause Time	
Trigger Parameters	

Report Job Execution Information

Report Job Status	Success
Start Processing Time	8/4/18 11:44:41 PM WEST
End Processing Time	8/4/18 11:44:42 PM WEST
Time Elapsed	0.828 seconds

Report Parameters

Employee	All
Department	Marketing;Purchasing

Bursting Definitions

Split by /ROWSET/ROW/DEPARTMENT_NAME

Output & Delivery

XML Data Diagnostic Log Publish

Status All

Output Name	Template	Format	Locale	Time Zone	Calendar	Status	Send	XML Data	Republish
Burst	SimpleRTF	PDF	English (United States)						
Burst	SimpleRTF	PDF	English (United States)						

Click to view the details.

You can send or republish the report.

Viewing Job History Details After Bursting

Report Job History

Owner: weblogic
Report Name: BurstRD
Report Scope: Private
Report Job Schedule: 8/4/18 11:44:41 PM WEST
Active Start Date
Active End Date
Trigger Data Model
Trigger Name
Trigger Retry Limit
Trigger Pause Time
Trigger Parameters

End Processing Time: 8/4/18 11:44:42 PM WEST
Time Elapsed: 0.828 seconds

Report Parameters

Employee: All
Department: Marketing;Purchasing

Bursting Definitions

Split by: /ROWSET/ROW/DEPARTMENT_NAME

Output & Delivery

XML Data Diagnostic Log Republish

Status	All	▼							
Output Name	Template	Format	Locale	Time Zone	Calendar	Status	Send	XML Data	Republish
Burst	SimpleRTF	PDF	English (United States)						

Split Key and Value:
Split by Value: Purchasing

Delivery 1: File

Directory: D:\MyFiles
File Name: Purchasing.pdf

Last Updated: 8/4/18 11:44:42 PM WEST

This delivery output was split into Purchasing.

Quiz

In BI Publisher, which feature enables you to schedule long-running queries or reports to be run at a specified time and date?

- a. Publishing
- b. Administration
- c. Scheduling
- d. Reporting

Quiz

You can edit a scheduled job that is currently in active status.

- a. True
- b. False

Quiz

Each scheduled job can have multiple output files with distinct characteristics, and each output file can have a separate destination.

- a. True
- b. False

Quiz

The four notification statuses for the reports in BI Publisher are “Report completed,” “Report completed with warnings,” “Report failed,” and “Report skipped.” BI Publisher supports two methods of notifications. What are the two methods of notification?

- a. Print and PDF
- b. Email and HTTP
- c. Text and charts
- d. PPT and XLS

Quiz

Bursting is enabled at the report level and used when you schedule reports.

- a. True
- b. False

Quiz

You can enable “Use Bursting Definition to Determine Output and Delivery Destination” in the delivery options only if the bursting definition has been configured to that specific data model.

- a. True
- b. False

Summary

In this lesson, you should have learned how to:

- Schedule reports
- View report jobs and job history
- Edit and manage the scheduled reports
- Schedule a report with triggers
- Provide an overview of bursting
- Add a bursting definition
- Schedule reports for bursting
- View the details of job history when bursting is defined

Practice 9: Overview

This practice covers the following topics:

- Examining the BI Publisher Scheduler
- Scheduling a BI Publisher report
- Editing a scheduled report job
- Scheduling a report with trigger
- Reviewing the report and job history
- Bursting the report to a file location

10. Integrating BI Publisher with Oracle BI Enterprise Edition

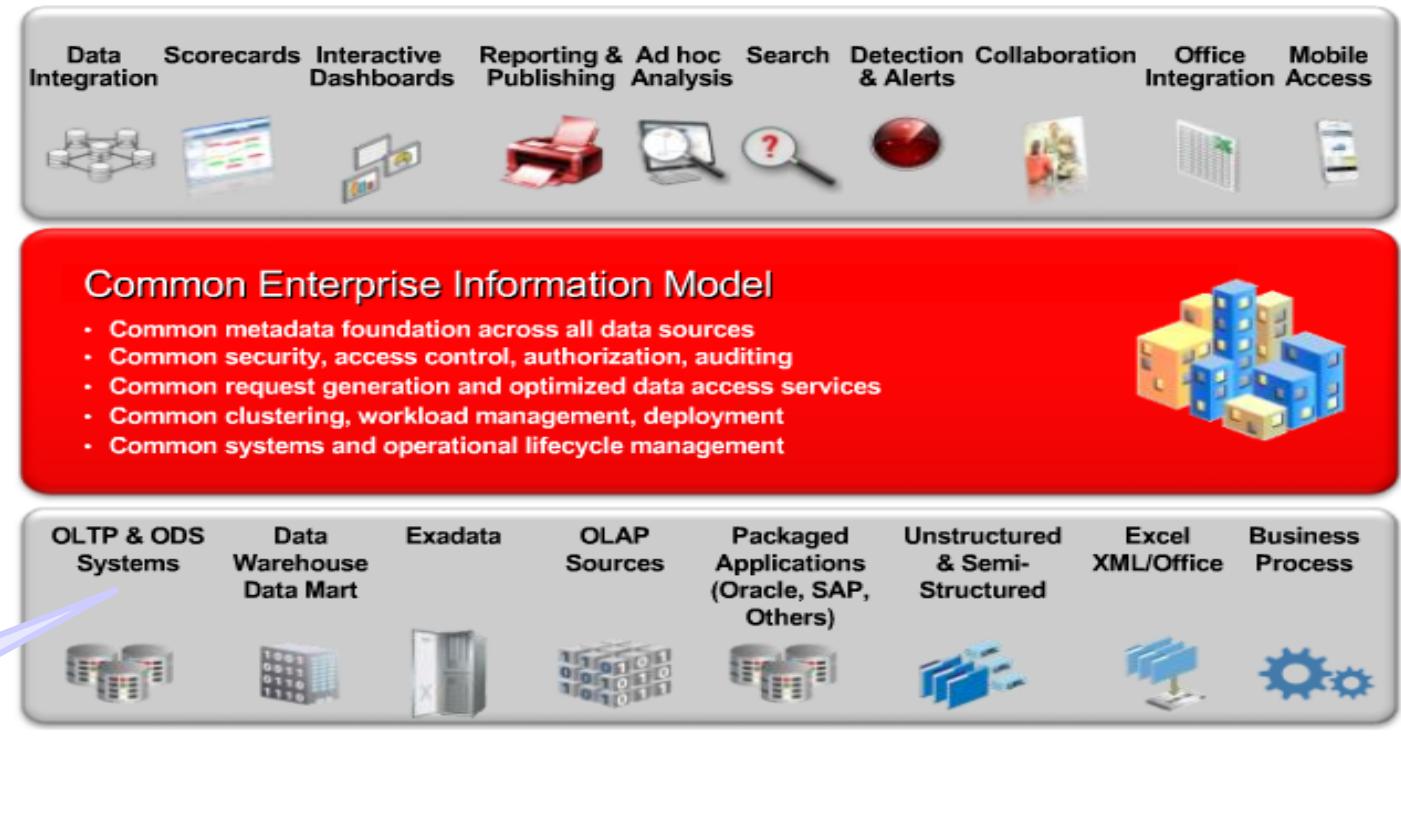
Objectives

- After completing this lesson, you should be able to:
 - Explain how BI Publisher integrates with Oracle BI EE
 - Create a report against Oracle BI EE subject area
 - Edit the parameters for the report based on the Oracle BI EE subject area
 - Create a report based on BI Server SQL Query data set
 - Create a BI Publisher report based on a BI analysis by using web services
 - Add a BI Publisher report to a dashboard

Revisiting the BI Foundation Suite Model

- BI Publisher:

- Resides in the Foundation Suite layer
- Installs as part of Oracle BI EE Plus Suite
- Provides the option to install BI Publisher only



Oracle BI Publisher and Oracle BI EE Integration

- Out-of-the-box integration with Oracle BI EE comes preconfigured with the following options:
 - BI Publisher reports, data models, and other artifacts stored directly in the Presentation Services Catalog
 - A common fully integrated BI Publisher UI with menus for creating reports and data models, scheduling report jobs, and managing user preferences and catalog permissions
 - JDBC connection to BI Server (Oracle BI EE) for querying data using logical SQL against BI Server
 - BI Presentation Services integration via Web Services for using OBI EE Analyses as a data source and publishing reports to OBI EE dashboards
 - Direct access to OBI EE Semantic Layer subject areas through the JBIPS layer
 - Common security model (Fusion Middleware Security)

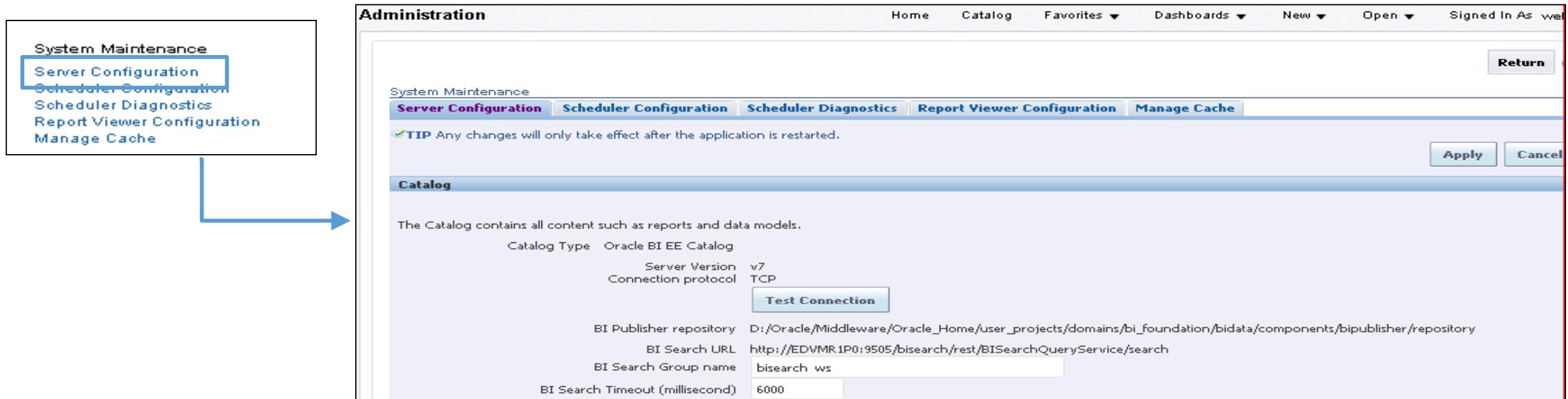
Configuring a JDBC Connection to BI Server

- The JDBC connection provides direct access to the semantic layer.

The screenshot shows the Oracle Business Intelligence Administration interface. On the left, a modal dialog titled "Update Data Source: Oracle BI EE" is open, allowing configuration of a JDBC connection. The "General" tab is selected, displaying fields for "Data Source Name" (set to "Oracle BI EE"), "Driver Type" (set to "Oracle BI Server" with "oracle.bi.jdbc.AnajdbcDriver" selected), "Connection String" (containing "jdbc:oracle:thin://EDVMR1P0:9514/"), and "Use System User" (checkbox checked). Below these are fields for "Username" and "Password", and dropdowns for "Pre Process Function" and "Post Process Function". At the bottom are "Test Connection" and "Cancel" buttons. In the background, the main administration interface shows sections for "Map Data Management", "Marketing", and "BI Publisher", each with its own sub-links.

Configuring Presentation Catalog Integration

- Presentation Catalog is automatically configured.
- You can edit the configuration from Administration > System Maintenance > Server Configuration link.



Configuring Presentation Services Integration

- 1.On the Administration page, on the Integration section, select Oracle BI Presentation Services.
- 2.Enter the required details for server protocol, server version, server host name, port, administrator username and password, URL suffix, and session time out.



Navigating Oracle BI EE

The screenshot shows the Oracle BI EE Home page. On the left, there's a sidebar titled "Create..." with icons and links for various features: Data Exploration & Discovery (Visual Analyzer Projects), Analysis and Interactive Reporting (Analysis Dashboard More), Mobile Application (Mobile App), Published Reporting (Report Report Job More), Actionable Intelligence (Agent Action), Performance Management (Scorecard KPI KPI Watchlist), and Marketing (Segment Segment Tree List Format). Below this is a section titled "Jobs" with links for Marketing Jobs, Report Jobs, and Report Job History.

The main content area has a "Recent" section with a note about recently opened or edited items. It also has a "Most Popular" section with a note about recommendations and a link to download BI Desktop Tools. At the top right, there are navigation links for Home, Catalog, Favorites, Dashboards, New, Open, and Signed In As weblogic. A search bar at the top is set to "All".

Three callout boxes with arrows point from the text in the "Recent" and "Most Popular" sections to the corresponding UI elements:

- An arrow points from the "Recently opened or edited items will be displayed here." note to the "Recent" section header.
- An arrow points from the "No recommendations are currently available. Most popular items will be displayed here when results become available." note to the "Most Popular" section header.
- An arrow points from the "Create a new object." callout to the "Create..." sidebar.

Another callout box points from the "Go to the New Home Page" link to the "New" link in the top navigation bar.

Annotations in the screenshot:

- A callout box with a purple border and white background contains the text "Search the Catalog." pointing to the search bar.
- A callout box with a purple border and white background contains the text "Create a new object." pointing to the "Create..." sidebar.
- A callout box with a purple border and white background contains the text "Classify the regularly accessed objects as favorites" pointing to the "Favorites" link in the top navigation bar.

Navigating Oracle BI EE

The screenshot shows the Oracle BI EE Home page. On the left, there's a 'Create...' section with icons for Data Exploration & Discovery, Analysis and Interactive Reporting, Mobile Application, Published Reporting, Actionable Intelligence, Performance Management, and Marketing. Below this is a 'Jobs' section with links for Marketing Jobs, Report Jobs, and Report Job History. In the center, there's a 'Recent' section with a note about recently opened or edited items and a 'Most Popular' section with a note about recommendations. A dropdown menu for 'Download BI Desktop Tools' is open, showing options like Smart View for MS Office, Financial Reporting Studio, Essbase Studio Console, Essbase Administrative Services..., Oracle BI Client Installer (64 bit), and Template Builder For Word (64 ...). A purple callout box points to the 'Published Reporting' section with the text 'Create BI Publisher objects from Published Reporting.' Another purple callout box points to the 'Report Job History' link with the text 'Navigate to Job History'. A blue callout box points to the 'Download BI Desktop tools' section with the text 'Download BI Desktop tools' and an arrow pointing to the 'Go to the New Home Page' link.

ORACLE Business Intelligence

Search All Advanced Administration Help Sign Out

Home Catalog Favorites Dashboards New Open Signed In As weblogic

Create...

Recent

Recently opened or edited items will be displayed here.

Most Popular

No recommendations are currently available. Most Popular items will be displayed here when results become available.

Download BI Desktop Tools ▾

Download BI Desktop tools

Go to the New Home Page

Create BI Publisher objects from Published Reporting.

Download BI Desktop Tools ▾

- Smart View for MS Office
- Financial Reporting Studio
- Essbase Studio Console
- Essbase Administrative Services...
- Oracle BI Client Installer (64 bit)
- Template Builder For Word (64 ...)

Jobs

Marketing Jobs

Report Jobs

Report Job History

Navigate to Job History

Creating Objects from the Global Header

The screenshot shows the Oracle Business Intelligence Home page. A purple callout box labeled "New (global header)" points to the "New" button in the top right corner. Another purple callout box labeled "Published Reporting" points to the "Published Reporting" section in the sidebar.

Home

Create...

- Data Exploration & Discovery
Visual Analyzer Projects
- Analysis and Interactive Reporting
Analysis Dashboard More ▾
- Mobile Application
Mobile App
- Published Reporting
Report Report Job More ▾
- Actionable Intelligence
Agent Action
- Performance Management
Scorecard KPI KPI Watchlist
- Marketing
Segment Segment Tree List Format

Jobs

- Marketing Jobs
- Report Jobs

Search All Advanced Administration Help Sign Out

Home Catalog Favorites Dashboards New Open Signed In As weblogic Data Exploration & Discovery Visual Analyzer Projects 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

New (global header) displayed here.

Most Popular

No recommendations are currently available. Most Popular items will be Download BI Desktop Tools

Published Reporting

Reporting Against Oracle BI EE's Common Metadata Layer Using BI Publisher

- You can create reports against data sources modeled into an RPD by using the following methods:
 - Connect directly to a subject area via the JBIPS layer (no BI Publisher data model required).
 - Query data from the source by issuing logical SQL via a JDBC connection to BI Server.
 - Use existing OBI Analyses as a data source over Web Services.

Creating a Report Based on a BI EE Subject Area

- 1.Create a new report.
- 2.Select an Oracle BI EE subject area.
- 3.Select the layout.
- 4.Save and view the report.
- 5.Edit the report to include parameters.

Creating a Report Based on BI EE Subject Area

- Create a new report with the BI EE subject area:

The image shows two screenshots of a BI reporting application interface.

Left Screenshot (Navigation Bar):

- New ▾
- Open ▾
- Signed In As

Data Exploration & Discovery

- Visual Analyzer Projects

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

The "Report" item is highlighted with a blue border.

Right Screenshot (Create Report Wizard):

Create Report

Progress: Select Data → Select Layout → Create Chart → Create 2nd Chart → Create Table → Save Report

Select Data

- Use Data Model
- Upload Spreadsheet
- Use Subject Area

The "Use Subject Area" option is highlighted with a blue border.

Create a report using a BI Subject Area

Subject Area: A - Sample Sales ▾

- A - Sample Sales
- B - Sample Costs

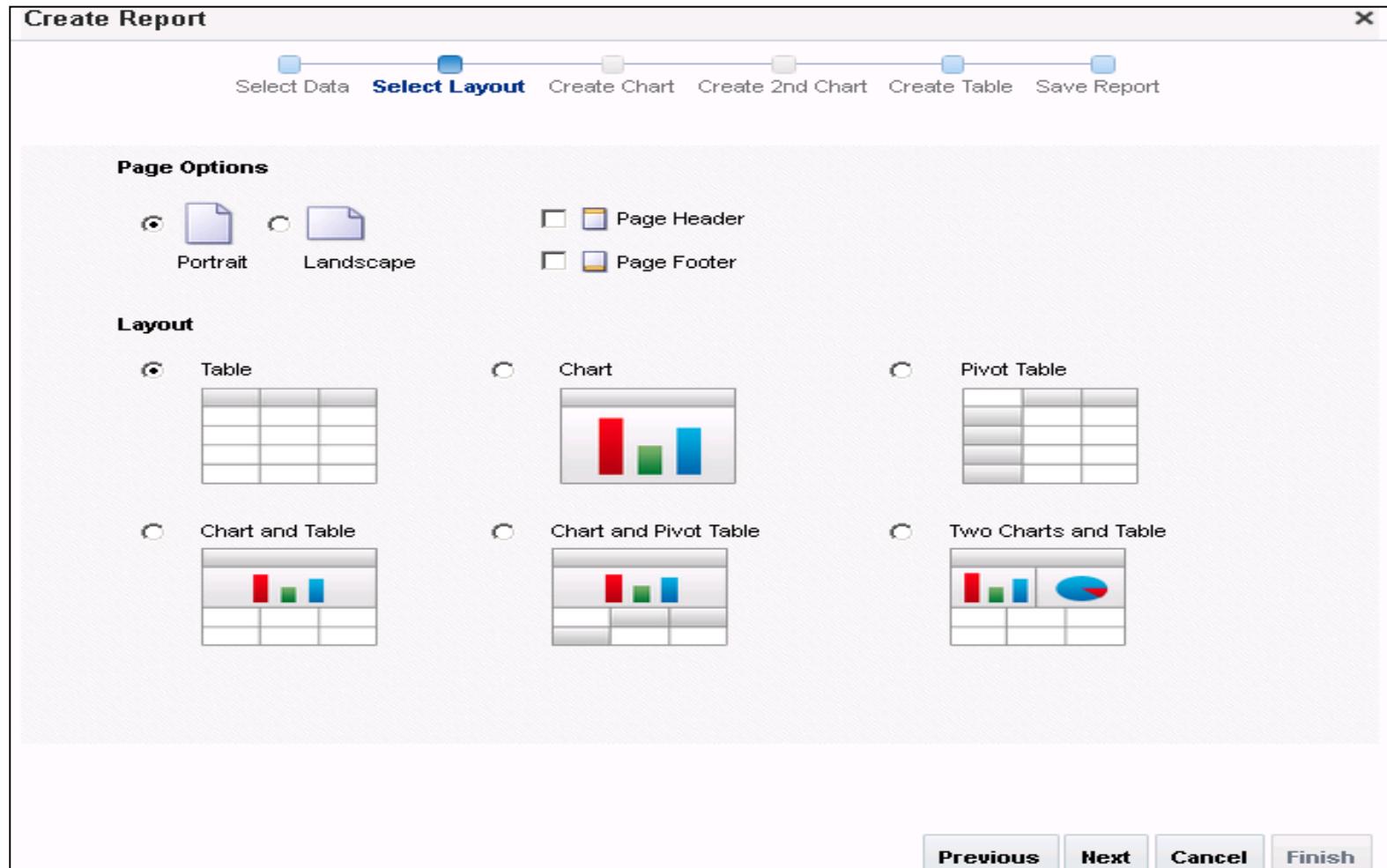
How do you want to create your report?

Guide Me

Use Report Editor

Creating a Report Based on a BI EE Subject Area

- Select the Layout:



Creating a Report Based on a BI EE Subject

Create Report

Select Data Select Layout **Create Chart** Create 2nd Chart Create Table Save Report

Drag fields from the Data Source to create the chart. Sa

Create Graph

Data Source

- A - Sample Sales
- Time
- Products
 - P1 Product
 - P2 Product Type
 - P3 LOB
 - P4 Brand
 - PO Product Numt
 - P5 Attribute 1
 - P6 Attribute 2
 - Product Ragged S
 - Double Column F
- Offices

1- Revenue

Drop Value Here

5,000K
4,000K
3,000K
2,000K
1,000K

OK Drop Label Here 1- Rev

Create Report

Select Data Select Layout Create Chart Create 2nd Chart **Create Table** Save Report

Drag fields from the Data Source to create the table. Sample data is displayed.

Data Source

- Customers
- Orders
 - R1 Order Status
 - R2 Order Type
 - R3 Order Currenc
 - R5 Order Discoun
 - R6 Transactional
- Ship To Regions
- Orders Dates
- Calculated Attribu
- Other Objects
- Facts

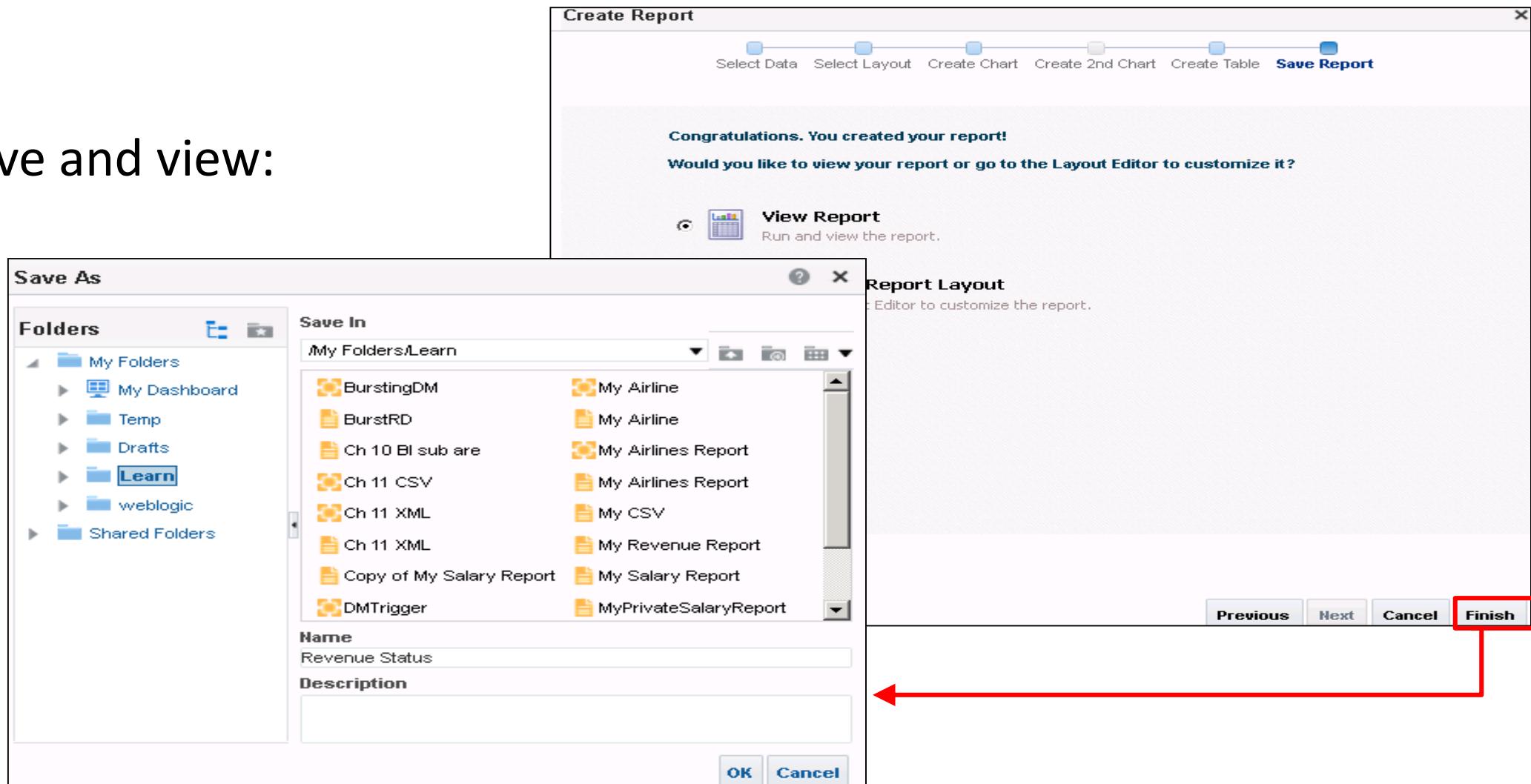
P1 Product	D4 Company	R1 Order Status	1- Revenue
7 Megapixel Digital Camera	Genmind Corp	1-Booked	104092.9300000000
7 Megapixel Digital Camera	Genmind Corp	2-Fulfilled	265955.36
7 Megapixel Digital Camera	Genmind Corp	3-Shipped	158215.81
7 Megapixel Digital Camera	Genmind Corp	4-Billed	205483.42
7 Megapixel Digital Camera	Genmind Corp	5-Paid	460036.38
7 Megapixel Digital Camera	Genmind Corp	6-Cancelled	107116.98
7 Megapixel Digital Camera	Genmind Corp	9-On Hold	105903.6500000000
7 Megapixel Digital Camera	Stockplus Inc.	1-Booked	35385.92
7 Megapixel	Stockplus Inc.	2-Fulfilled	168924.97

Show Grand Totals Row Previous Report

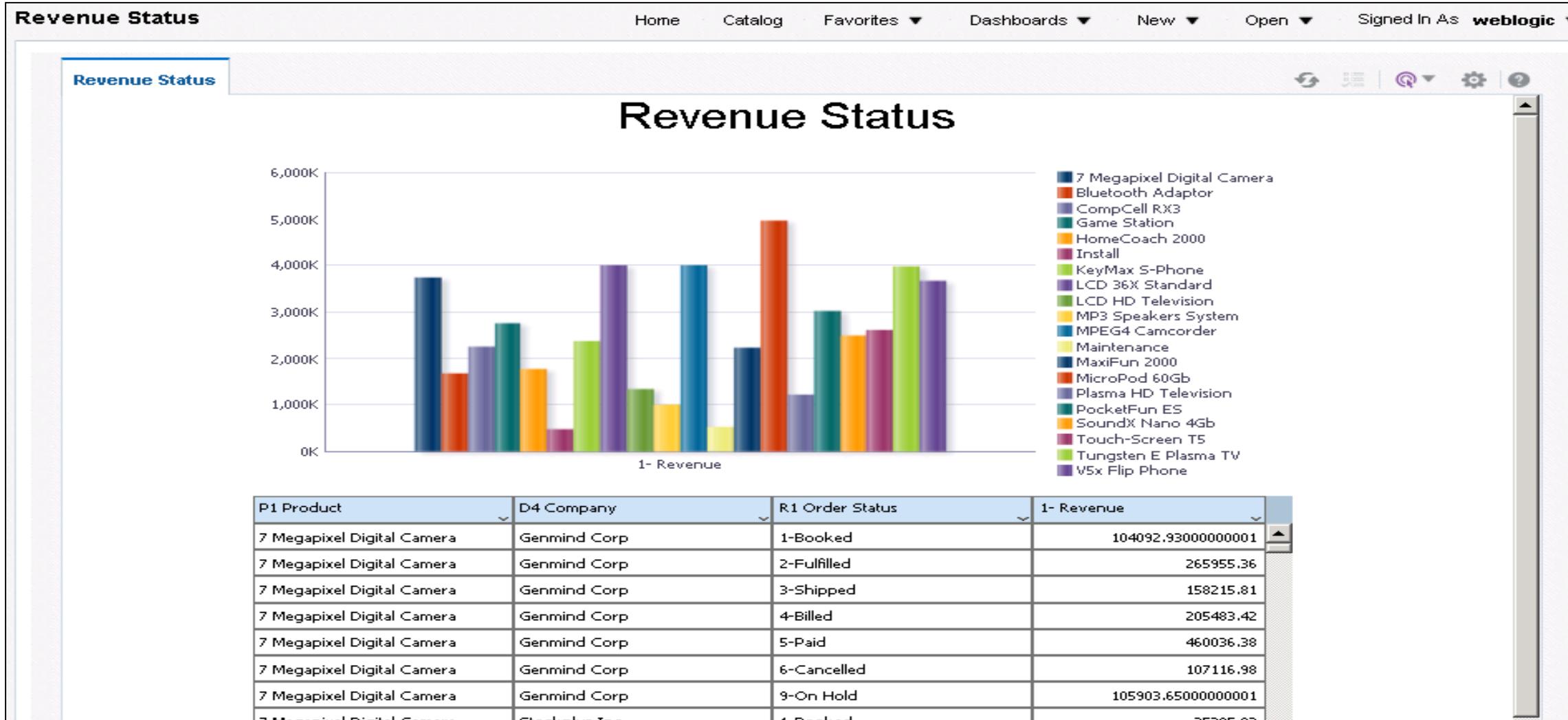
Create Table

Creating a Report Based on a BI EE Subject Area

- Save and view:



Viewing a Report Based on a BI EE Subject



Adding Parameters to BI EE Subject Area Reports

The screenshot displays two windows of a BI EE application, both titled "Revenue Status".

Top Window: This is the main report view. It shows a chart with a single data point labeled "6,000K". The chart area has a light blue background with a grid. To the right of the chart, there is a legend with three items: "7 Megapixel Digital Camera" (blue square), "Bluetooth Adaptor" (orange square), and "CD ROM" (grey square). The top navigation bar includes links for Home, Catalog, Favorites, Dashboards, New, Open, and Signed In As (weblogic). On the far right, there is a toolbar with icons for Edit Report, Edit Layout, and Export, with the "Edit Report" icon highlighted by a red box.

Bottom Window: This is the report configuration window. It shows the same "Revenue Status" title and subject area information ("A - Sample Sales"). It features a toolbar with buttons for Parameters, Properties, View Report, View Thumbnails, and View a list, with the "Parameters" button highlighted by a red box. Below the toolbar is a large empty rectangular area, likely a placeholder for report components. At the bottom of this window, there is a link to "Revenue Status" with options to Edit, Properties, or Delete.

Adding Parameters to BI EE Subject Area

Parameter

Display Options

Parameter Location: Horizontal Region ▾

Parameter Label Location: Place label on side ▾

Show Apply Button: True ▾

Parameters

Show	Name
[No Parameter Defined]	

Select A Column to Define Parameter

Columns

- ▲ A - Sample Sales
- ▶ Time
- ▶ Products
- ▲ Offices
 - D1 Office
 - D2 Department
 - D3 Organization
 - D4 Company**
 - Office Regions
 - More Office Objects

OK Cancel

Edit Parameter

Parameter for Column: D4 Company

Label: D4 Company

Display: Choice List ▾

Operator: is equal to / is in ▾

OK Cancel

The screenshot illustrates the process of adding a parameter to a BI EE Subject Area. In the main 'Parameter' window, the 'Display Options' section is visible, along with settings for 'Parameter Location' (Horizontal Region), 'Parameter Label Location' (Place label on side), and 'Show Apply Button' (True). The 'Parameters' table is empty, indicated by the message '[No Parameter Defined]'. A red box highlights the green '+' button in the top-left corner of this table. A modal dialog titled 'Select A Column to Define Parameter' lists various columns under 'Columns', including 'A - Sample Sales', 'Time', 'Products', and 'Offices'. Under 'Offices', several sub-options are listed: 'D1 Office', 'D2 Department', 'D3 Organization', and 'D4 Company'. The 'D4 Company' option is also highlighted with a red box. Finally, the 'Edit Parameter' dialog is open, showing the configuration for the selected 'D4 Company' column. The 'Label' is set to 'D4 Company', 'Display' is set to 'Choice List', and the 'Operator' is set to 'is equal to / is in'. Both the 'Edit Parameter' and 'Select A Column' dialogs have 'OK' and 'Cancel' buttons at the bottom.

Adding Parameters to BI EE Subject Area Reports

Parameter X

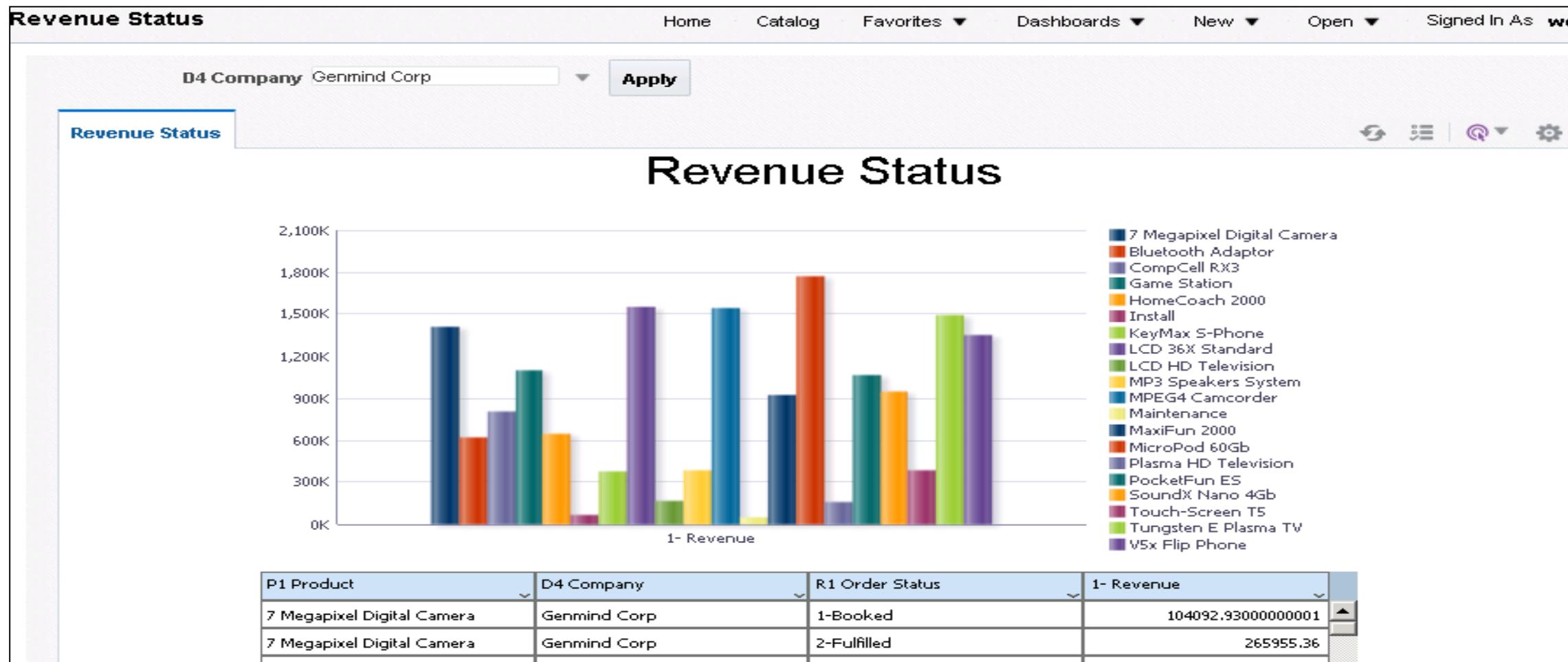
Display Options

Parameter Location: Horizontal Region ▾
Parameter Label Location: Place label on side ▾
Show Apply Button: True ▾

Parameters

+	-	Show	Name	Display	Multiple	Label	Default Value	Row Placement	Edit		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	D4 Company	Choice List	▼	False	▼	D4 Company	Genmind Corp	▼	1	

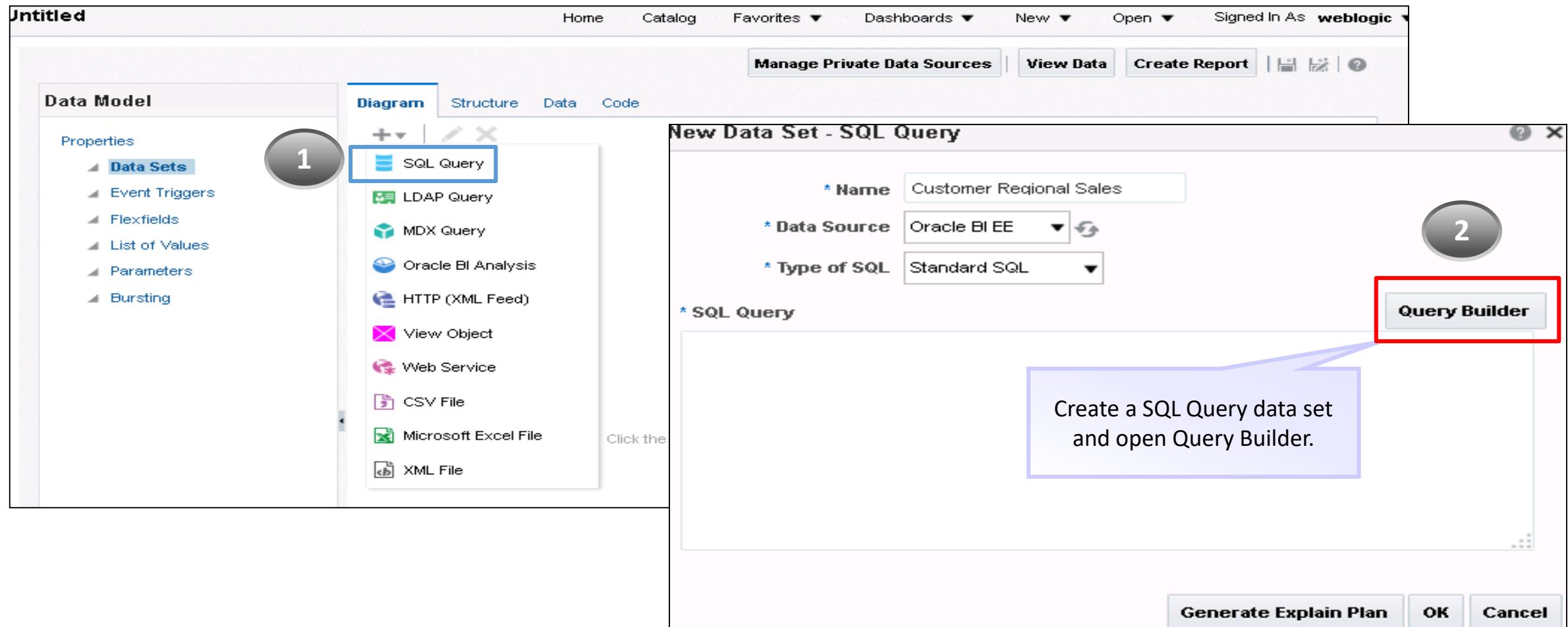
Viewing BI EE Subject Area Reports with Parameters



Creating a Data Model and Report Based on a BI Server SQL Query: Process Overview

- 1.Add a SQL Query data set.
- 2.Select the objects for the query.
- 3.View and save the results.

Step 1: Adding a SQL Query Data Set



Step 2: Selecting the Objects for the Query

The screenshot shows the Oracle BI Administration Tool interface with the following components:

- Catalog:** A - Sample Sales
- Schema:** Search
- Model:** Conditions, SQL, Results, 10 dropdown.
- Selected column:** C1 Customer Name (selected in the Customers list).
- Presentation:** SupplierSales subject area. It includes a tree view of dimensions (Customer, Time, Product, Employee) and facts (Fact-Sales). The Fact-Sales node has many child items like Dollars, Net Weight Shipped, etc.
- Business Model and Mapping:** SupplierSales business model. It shows Customer, Employee, Product, and Time dimensions, along with Fact-Sales and Dim-Customer fact tables.
- Physical:** Oracle database schema (orcl). It lists various tables and objects such as D1_CUSTOMER2, D1_CALENDAR2, D1_ORDERS2, etc.
- Annotations:**
 - A callout points to the Customers list with the text: "These are the tables stored in the Presentation Catalog."
 - A callout points to the left sidebar with the text: "This is the repository (.rpd) used for the data source."

Step 2: Selecting the Objects for the Query

The screenshot illustrates the Oracle BI Query Builder interface, divided into two main tabs: **Conditions** and **SQL**.

Conditions Tab: This tab allows users to define conditions for their query. It features a grid where each row represents a selected object. The columns include **Column**, **Alias**, **Object**, **Condition**, **Sort Type**, **Sort Order**, **Show**, and **Function**. A red box highlights the **Condition** column, which contains the value "in (:P_Year)". Another red box highlights the **Sort Type** and **Sort Order** columns, specifically the "DESC" entry in the second row.

SQL Tab: This tab displays the generated SQL code. The code is as follows:

```
select "Customers"."C1 Customer Name" as "C1 Customer Name",
       "Time"."T05 Per Name Year" as "T05 Per Name Year",
       "Base Facts"."1- Revenue" as "1- Revenue",
       "Base Facts"."2- Billed Quantity" as "2- Billed Quantity",
       "Products"."P4 Brand" as "P4 Brand",
       "Cust Regions"."C50 Region" as "C50 Region"
  from "A - Sample Sales"."Cust Regions" "Cust Regions",
       "A - Sample Sales"."Products" "Products",
       "A - Sample Sales"."Base Facts" "Base Facts",
       "A - Sample Sales"."Time" "Time",
       "A - Sample Sales"."Customers" "Customers"
 where "Time"."T05 Per Name Year" in (:P_Year)
 order by "Cust Regions"."C50 Region" ASC, "Base Facts"."1- Revenue" DESC
```

Two callout boxes provide instructions: one pointing to the **Condition** column in the Conditions tab, and another pointing to the **Sort Type** and **Sort Order** columns in the same tab. Both callouts contain the text "Add a condition." and "Add a sort type and sort order." respectively.

Step 3: Viewing the Results and Saving the Query

The screenshot illustrates the process of viewing query results and saving them.

Top Window: A modal dialog box is displayed, prompting the user to "Enter a prompt value." for parameter "P_Year". The "OK" button is highlighted with a red border.

Bottom Window: The main application window shows a query results grid. The results are for "C1 Customer Name T05 Per Name Year 1- Revenue". The columns are labeled: 1- Revenue, 2- Billed Quantity, P4 Brand, and C50 Region. The data includes rows for various years and brands like BizTech, FunPod, and AMERICAS.

Annotations:

- A red arrow points from the "Save" button in the top window to the "Save" button in the bottom window.
- A blue box highlights the "Results" section of the bottom window.
- A red box highlights the "OK" button in the top window.
- A red box highlights the "Save" button in the bottom window.
- A red arrow points from the "OK" button in the top window to the "OK" button in the bottom window.

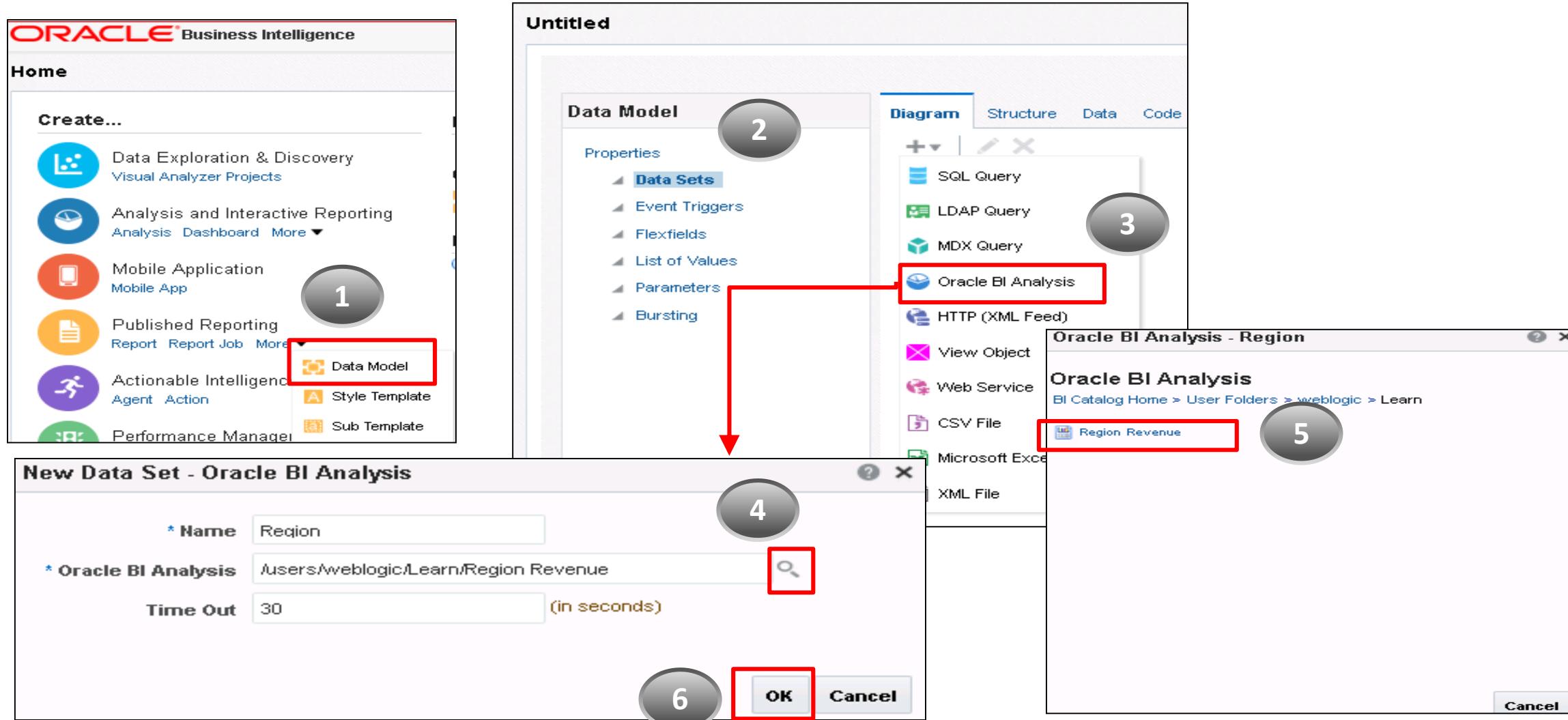
Code Snippet (SQL Query):

```
select "Customers"."C1_Customer Name" as "C1_Customer Name",
       "Time"."T05 Per Name Year" as "T05 Per Name Year",
       "Base Facts"."1- Revenue" as "1- Revenue",
       "Base Facts"."2- Billed Quantity" as "2- Billed Quantity",
       "Products"."P4_Brand" as "P4_Brand",
       "Cust Regions"."C50_Region" as "C50_Region"
  from "A - Sample Sales"."Cust Regions"."Cust Regions",
       "A - Sample Sales"."Products"."Products",
       "A - Sample Sales"."Base Facts"."Base Facts",
       "A - Sample Sales"."Time"."Time",
       "A - Sample Sales"."Customers"."Customers"
 where "Time"."T05 Per Name Year" in (:P_Year)
 order by "Cust Regions"."C50_Region" ASC, "Base Facts"."1- Revenue" DESC
```

Creating a Data Model and Report Based on an Oracle BI Analysis

1. Add an Oracle BI Analysis data set.
2. Define the XML tag and display names.
3. View and save sample XML data.
4. Create a report.
5. Select a layout and build your BI Publisher report.
6. Save and view your report.

Step 1: Adding an Oracle BI Analysis Data Set



Step 2: Defining XML Tag and Display Names

The screenshot illustrates the process of defining XML Tag and Display Names for a data source structure.

Top Panel (Diagram View):

- Properties sidebar shows "Region" selected under "Data Sets".
- Toolbar tabs: Diagram (selected), Structure, Data, Code.
- Global Level Functions panel: "Drop here for aggregate function".
- Data structure panel: A table named "G_1" with columns Column0, Column1, and Column2.
- Header bar: Manage Private Data Sources, View Data, Create Report, and other navigation icons.

A red box highlights the "Structure" tab, and a red arrow points from the "Structure" tab to the "G_1" table.

Bottom Panel (Structure View):

- Properties sidebar shows "Region" selected under "Data Sets".
- Toolbar tabs: Diagram, Structure (selected), Data, Code.
- Table View: XML View and Business View sections.
- XML View:** Shows the "Data Source" hierarchy and corresponding "XML Tag Name" mappings:

Data Source	XML Tag Name	Sorting	Value If Null	Display Name	Data Type
Report Data					
Data Structure	DATA_DS				
Region	G_1				
A c135de9b781766112	Column0			"Cust Regions"."C"	A
A cb492a728293b5bde	Column1			"Products"."P3_LC"	A
#E c88dbf2502ac7f085	Column2			"Base Facts"."1_F"	#E
#E cb9823f79b603ecb7	Column3			"Base Facts"."2_E"	#E

A purple callout box with the text "Change the XML tag and display names." points to the "XML Tag Name" column in the XML View table.

Step 3: Viewing and Saving Sample XML Data

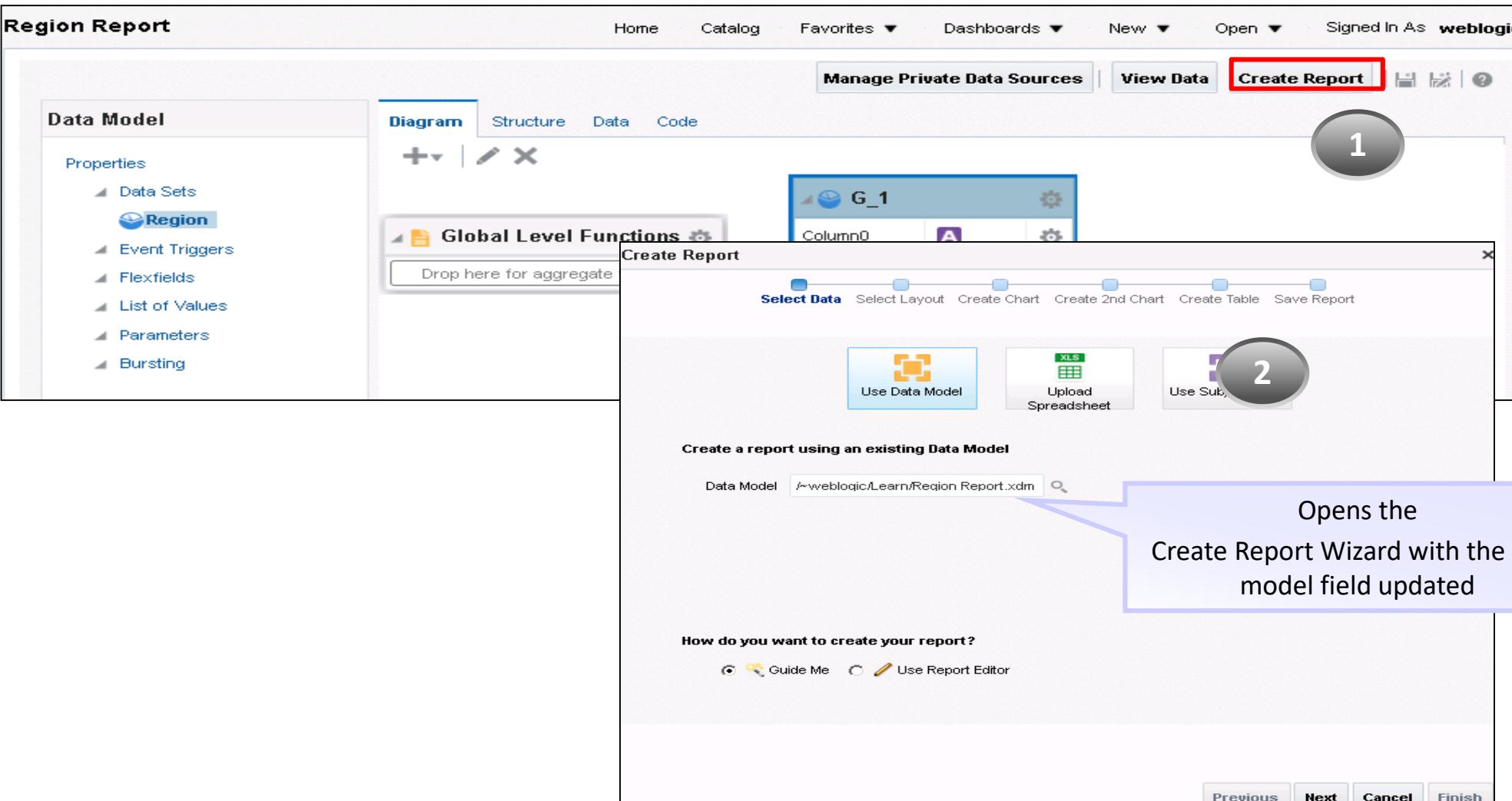
The screenshot shows the Oracle BI Data Modeler interface with the following steps highlighted:

- 1**: A red box highlights the "View Data" button in the top navigation bar.
- 2**: A red box highlights the "View" button in the toolbar below the navigation bar.
- 3**: A red box highlights the "Save As Sample Data" button in the toolbar below the navigation bar.
- 4**: A red box highlights the "Save As" dialog box.

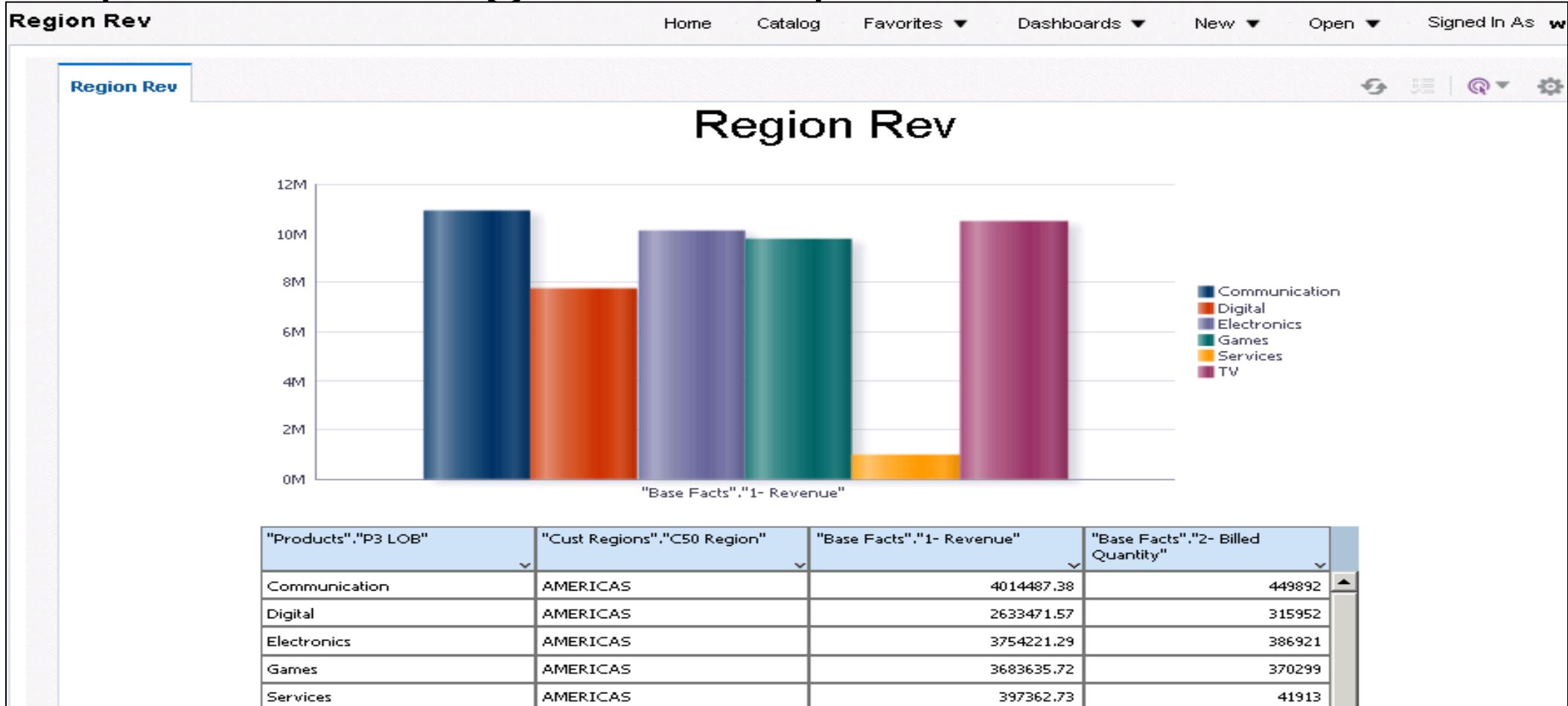
The "Save As" dialog box contains the following fields and options:

- Folders:** My Folders>Learn>Region Report
- Save In:** /My Folders/Learn>Region Report
- Name:** Region Report
- Description:** (empty)
- OK** and **Cancel** buttons at the bottom right

Step 4: Creating a Report for the Analytic Data Source



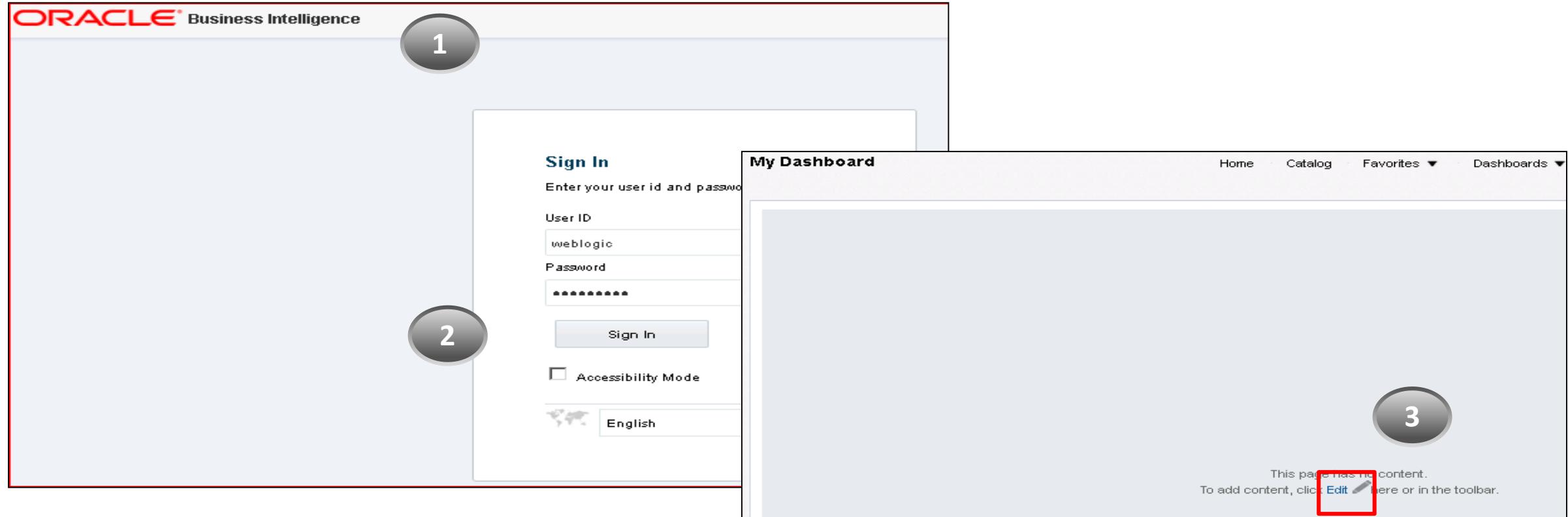
Step 5: Viewing Your Report



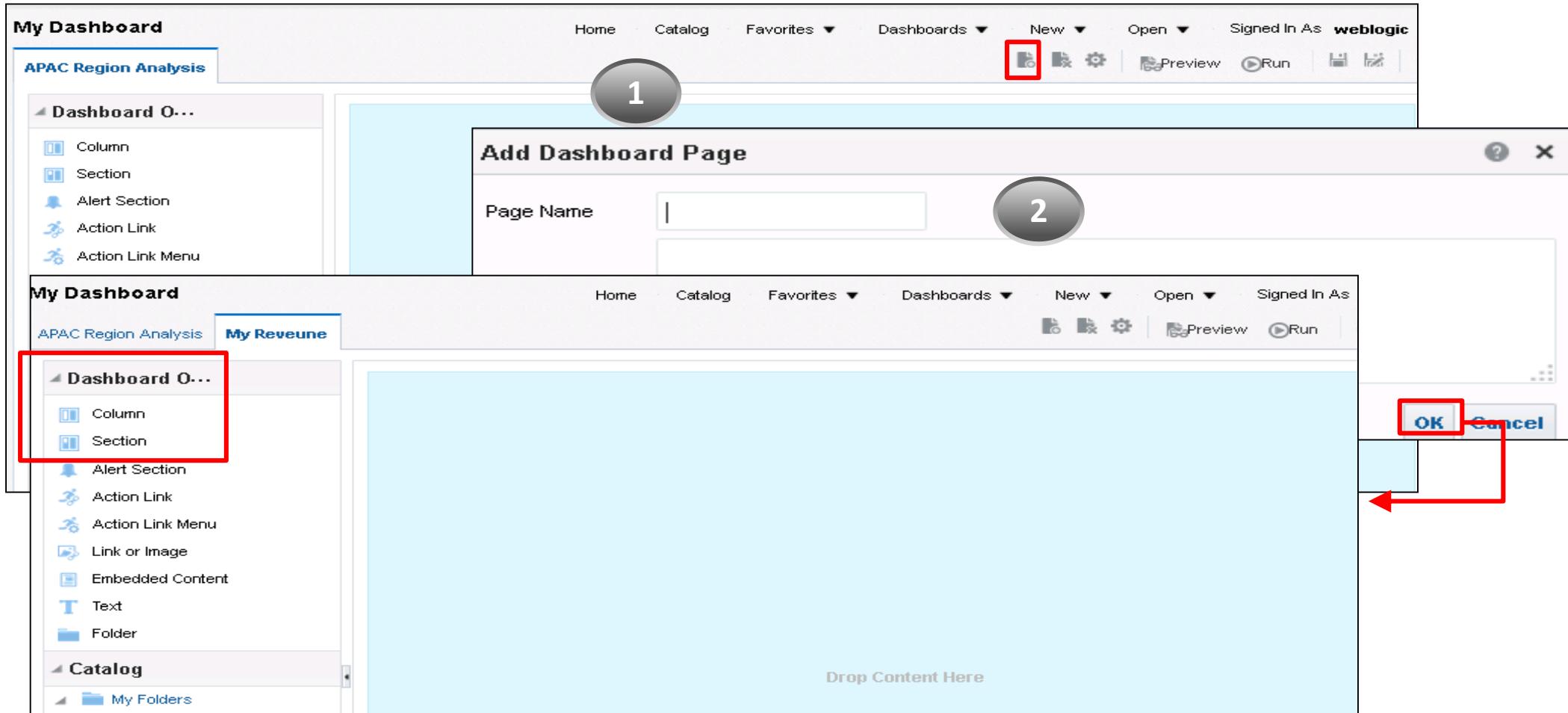
Adding a BI Publisher Report to an Oracle BI EE Dashboard

1. Log in to Oracle BI EE and edit your dashboard.
2. Add BI Publisher reports to your dashboard.
3. Run the dashboard.

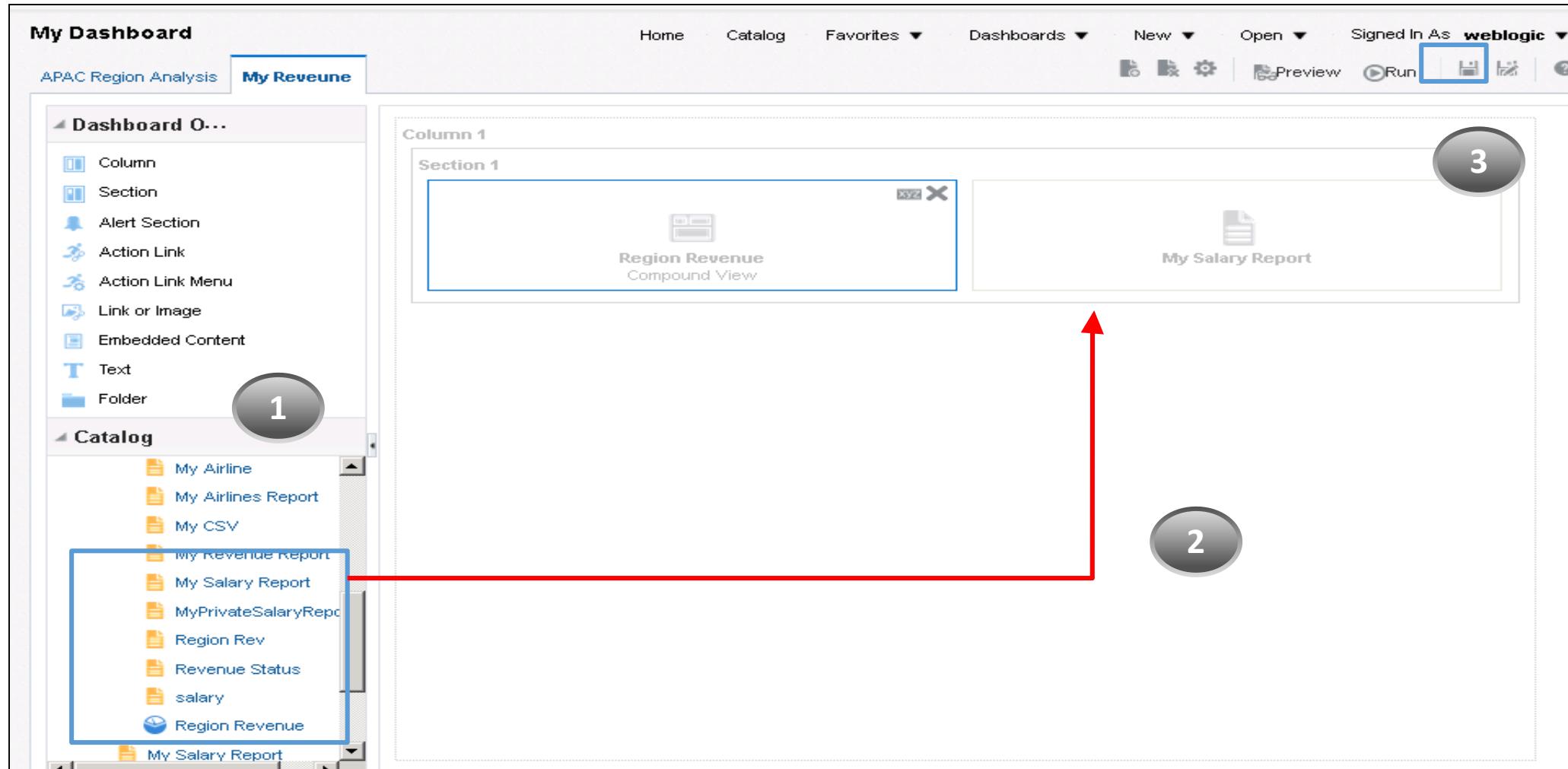
Step 1: Logging In to Oracle BI EE and Editing Your Dashboard



Step 2: Adding a BI Publisher Report to Your Dashboard



Adding BI Publisher Reports to Your Dashboard



Running Your Dashboard

The screenshot shows two Oracle BI Publisher dashboards. The top dashboard has a header bar with 'My Dashboard' and navigation links like Home, Catalog, Favorites, Dashboards, New, Open, and Signed In As (weblogic). A red box highlights the 'Run' button in the top right. The bottom dashboard also has a similar header. It features a 'Region Revenue' report (C50 Region) and a 'My Salary Report'. A callout box points from the text 'The BI Publisher reports appear on your dashboard.' to the 'My Salary Report' section. The 'Region Revenue' report table data is as follows:

C50 Region	P3 LOB	1- Revenue	2- Billed Quantity
AMERICAS	Communication	4,014,487	449892
	Digital	2,633,472	315952
	Electronics	3,754,221	386921
	Games	3,683,636	370299
	Services	397,363	41913
	TV	3,633,826	375372
APAC	Communication	2,743,088	309726
	Digital	2,122,109	243666
	Electronics	2,641,538	276037
	Games	2,397,367	247422
	Services	227,852	26712
	TV	2,757,129	282389
EMEA	Communication	4,127,842	464577

Analyze - Edit - Refresh - Copy

The 'My Salary Report' section contains a bar chart titled 'My Salary Report' showing annual salaries. The chart has three bars: one orange bar reaching approximately 2,000K, one purple bar reaching approximately 3,000K, and one yellow bar reaching approximately 1,000K. Below the chart is a table with columns: Department, Manager, and Full Name. The data is as follows:

Department	Manager	Full Name
Administration	Neena Kochhar	Jennifer Whalen
Marketing	Steven King	Michael Hartstein

Integrating BI Publisher Security: Roles and Groups

The screenshot shows the Oracle Business Intelligence interface. On the left, the 'Home' screen displays options like 'Create...', 'Recent', and 'Dashboards'. A red box highlights the 'My Account' link in the top right corner of the header. On the right, a modal dialog box titled 'My Account' is open. It shows the user ID 'weblogic' and display name 'weblogic'. Below these, there are tabs for 'Preferences', 'BI Publisher Preferences', 'Mobile Preferences', 'Delivery Options', and a red box highlighting the 'Roles and Catalog Groups' tab. Under this tab, a list of roles is shown: 'Authenticated User', 'BI Consumer', 'BI Content Author', and 'BI Service Administrator'. A purple callout box points to this list with the text 'Review the groups to which you belong.' At the bottom of the dialog are 'OK' and 'Cancel' buttons.

ORACLE Business Intelligence

Home

Create...

Recent

Dashboards

My Dashboard - My Revenue
Open Edit More

Search All Advanced Administration Help Sign Out

Signed In As weblogic My Account

User ID: weblogic

Display Name: weblogic

Preferences BI Publisher Preferences Mobile Preferences Delivery Options Roles and Catalog Groups

Authenticated User
BI Consumer
BI Content Author
BI Service Administrator

Review the groups to which you belong.

OK Cancel

Quiz: Overview

- This quiz examines your knowledge of the concepts discussed in the lesson.

Quiz

- BI Publisher integrates with Oracle BI EE on which of the following levels?
(Select all that apply.)
 - a. Direct access to BI Server's semantic layer through JDBC
 - b. Security integration
 - c. Integration with BI Presentation Server through web services

Quiz

- All BI Publisher reporting objects must be created within BI Publisher.
 - a. True
 - b. False

Quiz

- You do not need to create joins when basing a query on objects that are stored in the Presentation Catalog.
 - a. True
 - b. False

Summary

- In this lesson, you should have learned how to:
 - Explain how BI Publisher integrates with Oracle BI EE
 - Create a report against Oracle BI EE subject area
 - Edit the parameters for the report based on the Oracle BI EE subject area
 - Create a report based on BI Server SQL Query data set
 - Create a BI Publisher report based on a BI analysis by using web services
 - Add a BI Publisher report to a dashboard

Practice 10: Overview

- This practice covers the following topics:
 - Reviewing the Server Configuration > System Maintenance page
 - Creating a BI Publisher report based on an Oracle BI Server SQL data set
 - Creating a BI Publisher report based on an Oracle BI Analysis and adding this report to an Oracle BI EE Dashboard

11. Creating Data Models and BI Publisher Reports Based on Other Data Sources

Objectives

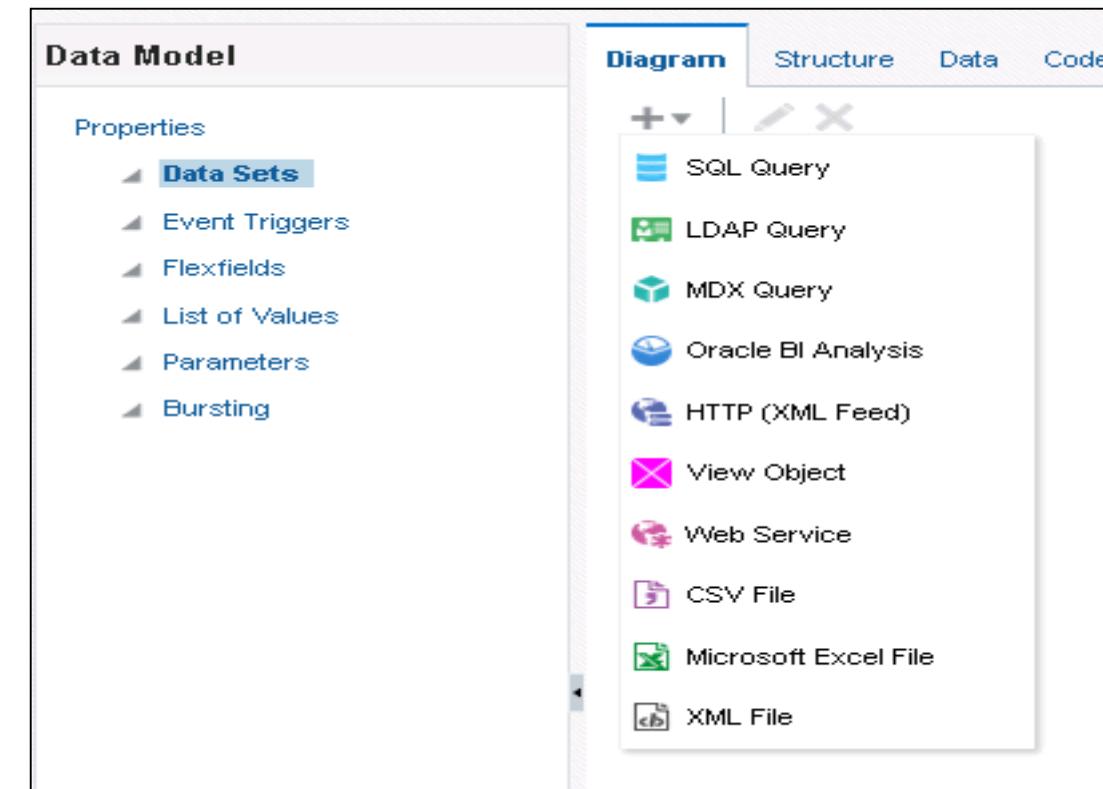
After completing this lesson, you should be able to create a BI Publisher report based on:

- Web services
- HTTP (XML/RSS feed)
- An XML file
- MS Excel spreadsheet
- A CSV file

Reviewing Supported Data Sources

BI Publisher supports the following data sources:

- SQL Query
- MDX Query (including Essbase)
- Oracle BI Analysis
- View Object
- LDAP Query
- XML File
- Microsoft Excel File
- Web Service
- HTTP(XML Feed)



Introduction to Web Services

- Web services:
 - Are open, standards-based web applications
 - Integrate applications across platforms to exchange data
 - Return valid XML data
- Web service standards include:
 - WSDL
 - SOAP
 - UDDI

HTTP (XML/RSS Feed) Data Source

- Websites provide XML, RSS, and other types of feeds.
- RSS feeds:
 - Support web content syndication or aggregation
 - Are popular for use with news and blogs

The screenshot shows a web-based application interface for Oracle BI Publisher Enterprise. At the top, there's a navigation bar with links for Home, Catalog, New, Open, and Signed In As (weblogic). Below the navigation bar, there are two main content areas:

- Business News**: A section titled "The New York Times" containing several news headlines:
 - Link
 - [Start-Ups Follow Twitter, and Become Neighbors](#)
 - [Obama's Trade Strategy Runs Into Stiff Resistance](#)
 - [U.S. and South Korea Fail to Agree on Trade](#)
 - [Wall St. Brings Its Misgivings to the World](#)
- Weather**: A section titled "KSFO" showing current weather conditions for San Francisco International Airport, CA. The data includes:

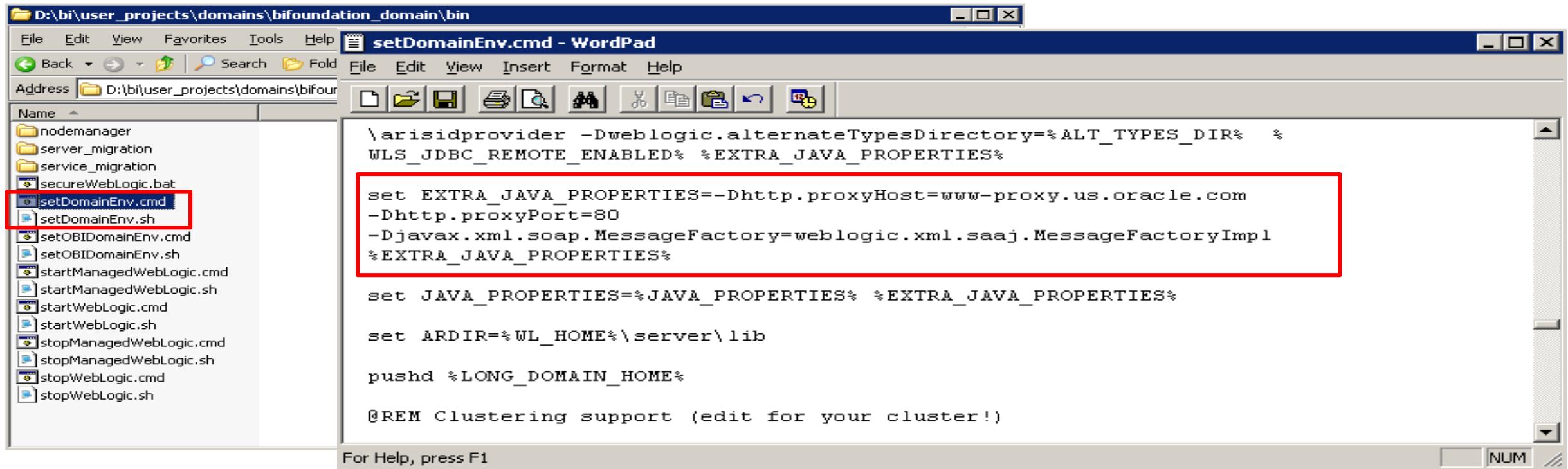
City	San Francisco Intl Airport, CA
Conditions	Fair
Temperature	54.0 F (12.2 C)
Wind	East at 6.9 MPH (6 KT)
Visibility (mi)	10.00

Last Updated: Last Updated on Feb 9 2011, 10:56 am PST

Proxy Settings for Web Services and HTTP Data Sources

When the WSDL or RSS/XML feed URLs are outside the firewall, you must:

- Configure Oracle WebLogic Server to recognize the proxy
- Restart the services



D:\bi\user_projects\domains\bifoundation_domain\bin

File Edit View Favorites Tools Help

Address D:\bi\user_projects\domains\bifour

Name

- nodemanager
- server_migration
- service_migration
- secureWebLogic.bat
- setDomainEnv.cmd** (highlighted)
- setDomainEnv.sh
- setOBIDomainEnv.cmd
- setOBIDomainEnv.sh
- startManagedWebLogic.cmd
- startManagedWebLogic.sh
- startWebLogic.cmd
- startWebLogic.sh
- stopManagedWebLogic.cmd
- stopManagedWebLogic.sh
- stopWebLogic.cmd
- stopWebLogic.sh

setDomainEnv.cmd - WordPad

File Edit View Insert Format Help

Address D:\bi\user_projects\domains\bifour

```
\varisidprovider -Dweblogic.alternateTypesDirectory=%ALT_TYPES_DIR% %
WLS_JDBC_REMOTE_ENABLED% %EXTRA_JAVA_PROPERTIES%

set EXTRA_JAVA_PROPERTIES=-Dhttp.proxyHost=www-proxy.us.oracle.com
-Dhttp.proxyPort=80
-Djavax.xml.soap.MessageFactory=weblogic.xml.saaj.MessageFactoryImpl
%EXTRA_JAVA_PROPERTIES%

set JAVA_PROPERTIES=%JAVA_PROPERTIES% %EXTRA_JAVA_PROPERTIES%

set ARDIR=%WL_HOME%\server\lib

pushd %LONG_DOMAIN_HOME%

REM Clustering support (edit for your cluster!)
```

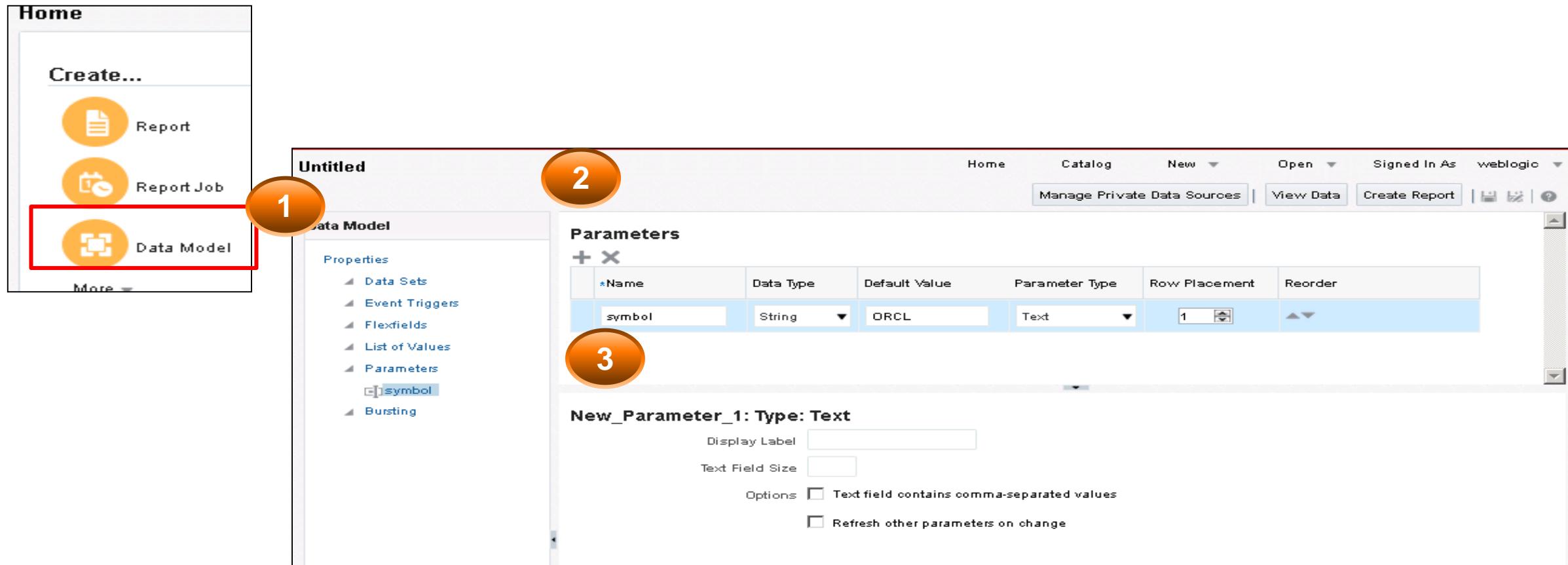
For Help, press F1

NUM

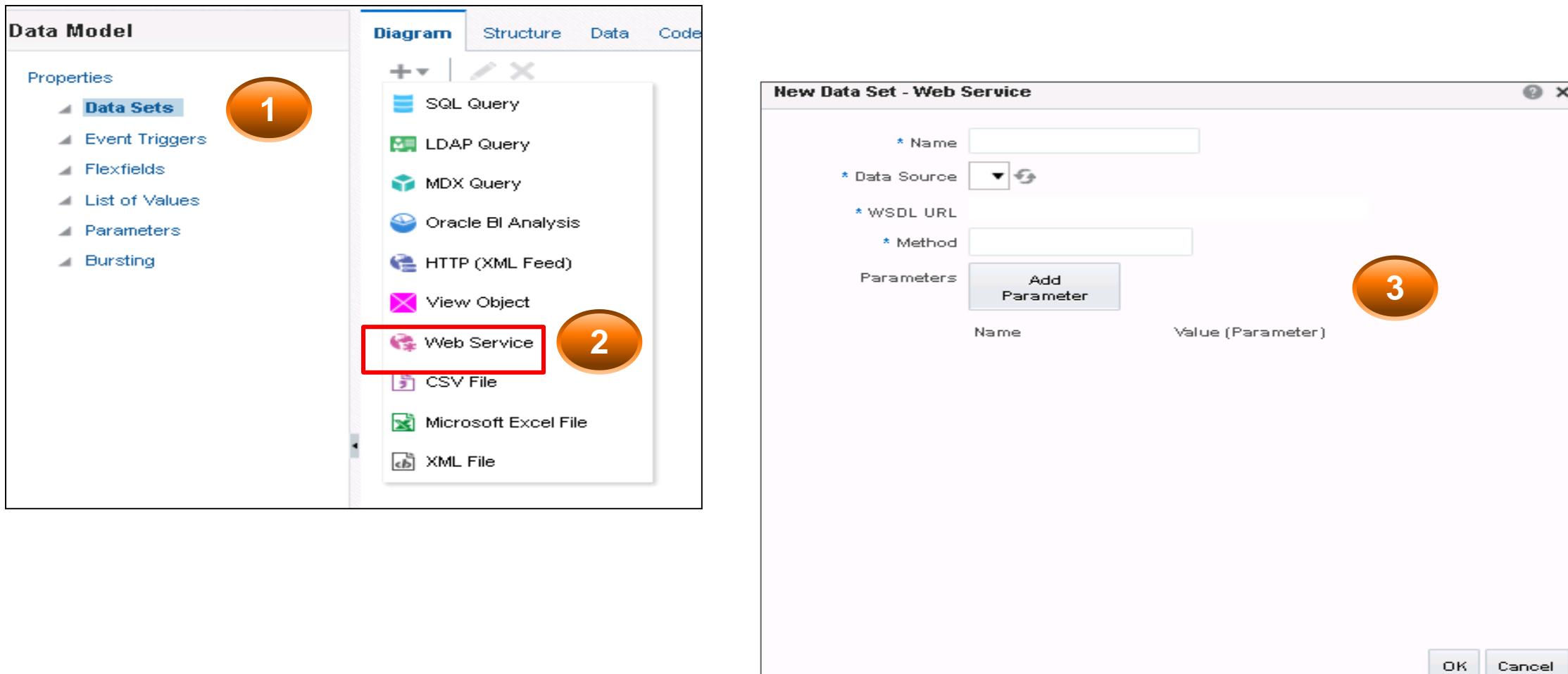
Creating a BI Publisher Report Based on External Web Services

1. Define a parameter.
2. Define a web service data set.
3. View the data for the web service data set.

Step 1: Defining a Parameter



Step 2: Defining a Web Service Data Set



Step 3: Viewing the Data

The screenshot shows a software application window titled "Data". At the top, there are tabs: "Diagram", "Structure", "Data" (which is selected), and "Code". Below the tabs, there is a search bar labeled "Enter Stock Symbol" with the value "ORCL". Underneath the search bar are buttons for "Rows" (set to "All") and "View" (disabled). There are also "Export" and "S" buttons.

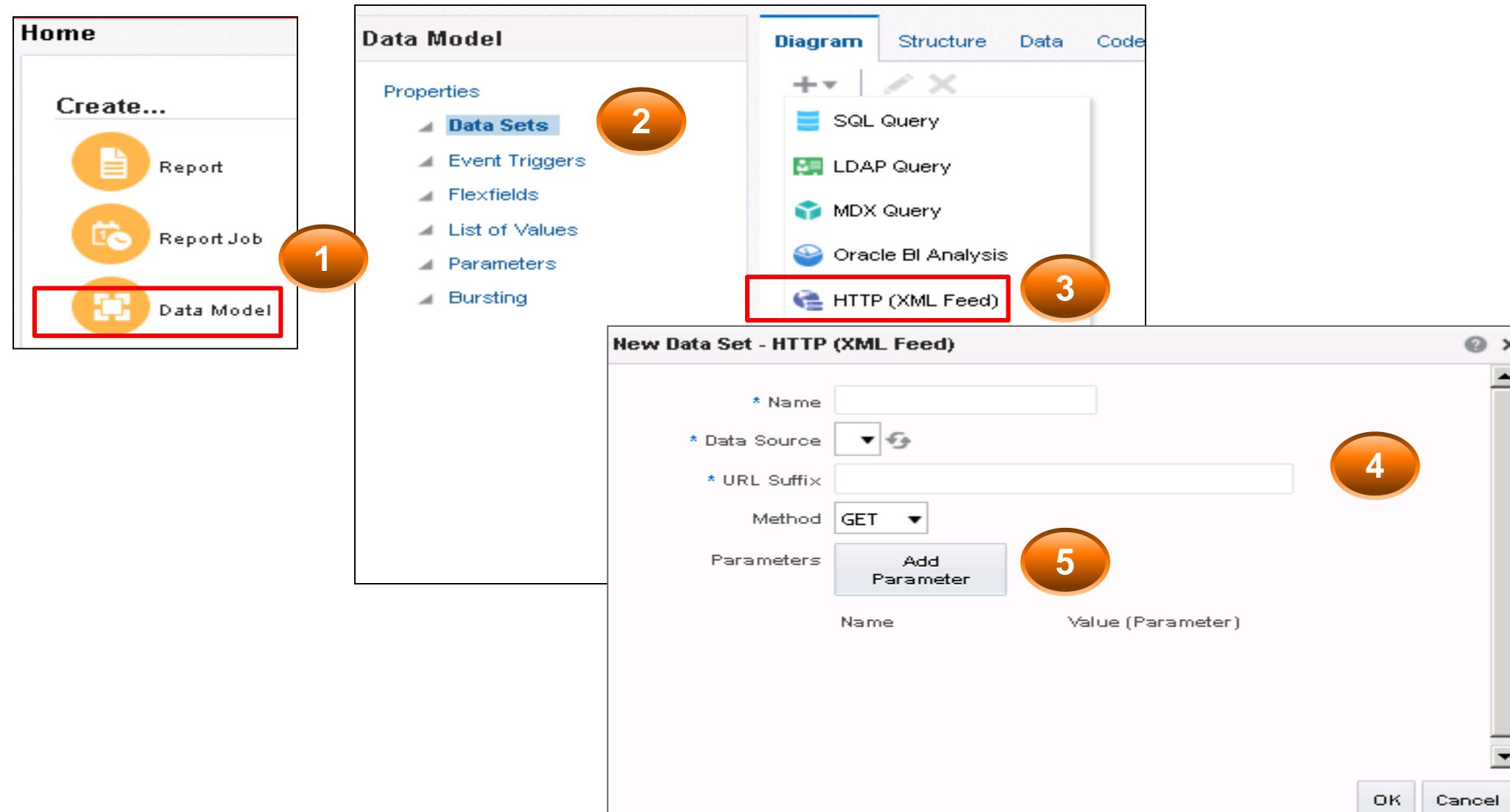
Below the toolbar, there are two navigation links: "Tree View" and "Table View". The main content area displays a tree view of stock quote data. The root node is "StockQuotes", which contains a single child node "Stock". The "Stock" node contains the following data items:

- Symbol (ORCL)
- Last (34.94)
- Date (1/24/2013)
- Time (4:00pm)
- Change (+0.25)
- Open (34.89)
- High (35.40)
- Low (34.815)
- Volume (18646660)
- MktCap (165.4B)
- PreviousClose (34.69)
- PercentageChange (+0.72%)
- AnnRange (25.33 - 35.20)
- Earns (2.127)
- P-E (16.31)
- Name (Oracle Corporatio)

Creating a BI Publisher Report Based on HTTP (XML/RSS Feed) Data Sources

1. Define an HTTP (XML/RSS feed) data set.
2. View the data.
3. Create a report for this data source.

Step 1: Defining an HTTP Data Set



Step 2: Viewing the Data

The screenshot shows a software interface for managing data sources. On the left, a sidebar titled 'Data Model' lists categories: Data Model, Data Sets (with 'News' selected), Event Triggers, Flexfields, List of Values, Parameters, and Bursting. The main area has tabs: Diagram, Structure, Data (selected), and Code. A toolbar above the tabs includes 'View Data', 'Create Report' (highlighted with a red box and orange circle labeled '1'), and other icons. Below the toolbar, buttons for 'Rows All' (highlighted with a red box and orange circle labeled '2'), 'View', 'Export', 'Save As Sample Data', and 'View Engine Log' are visible. The central pane displays a 'Tree View' of an RSS feed structure under the 'rss' node. The 'channel' node contains fields like title, link, atom:link, description, language, copyright, and lastBuildDate. The 'image' and 'item' nodes also contain their respective fields. The 'item' node is expanded to show a news item about start-ups following Twitter.

```
rss
  -> channel
    -> title (NYT > Business Day)
    -> link (http://www.nytimes.com/pages/business/index.html)
    -> atom:link [rel=self] [type=application/rss+xml] [href=http://www.nytimes.com]
    -> description
    -> language (en-us)
    -> copyright (Copyright 2010 The New York Times Company)
    -> lastBuildDate (Fri, 12 Nov 2010 07:30:53 GMT )
  -> image
    -> title (NYT > Business Day)
    -> url (http://graphics.nytimes.com/images/section/NytSectionHea)
    -> link (http://www.nytimes.com/pages/business/index.html)
  -> item
    -> title (Start-Ups Follow Twitter, and Become Neighbors)
    -> link (http://www.nytimes.com/2010/11/12/technology/12valley)
    -> guid (http://www.nytimes.com/2010/11/12/technology/12valley)
    -> description (Hoping some of Twitter's success will rub off on them,)
    -> dc:creator (By CLAIRE CAIN MILLER)
    -> pubDate (Fri, 12 Nov 2010 06:05:14 GMT )
```

Step 3: Viewing the Report

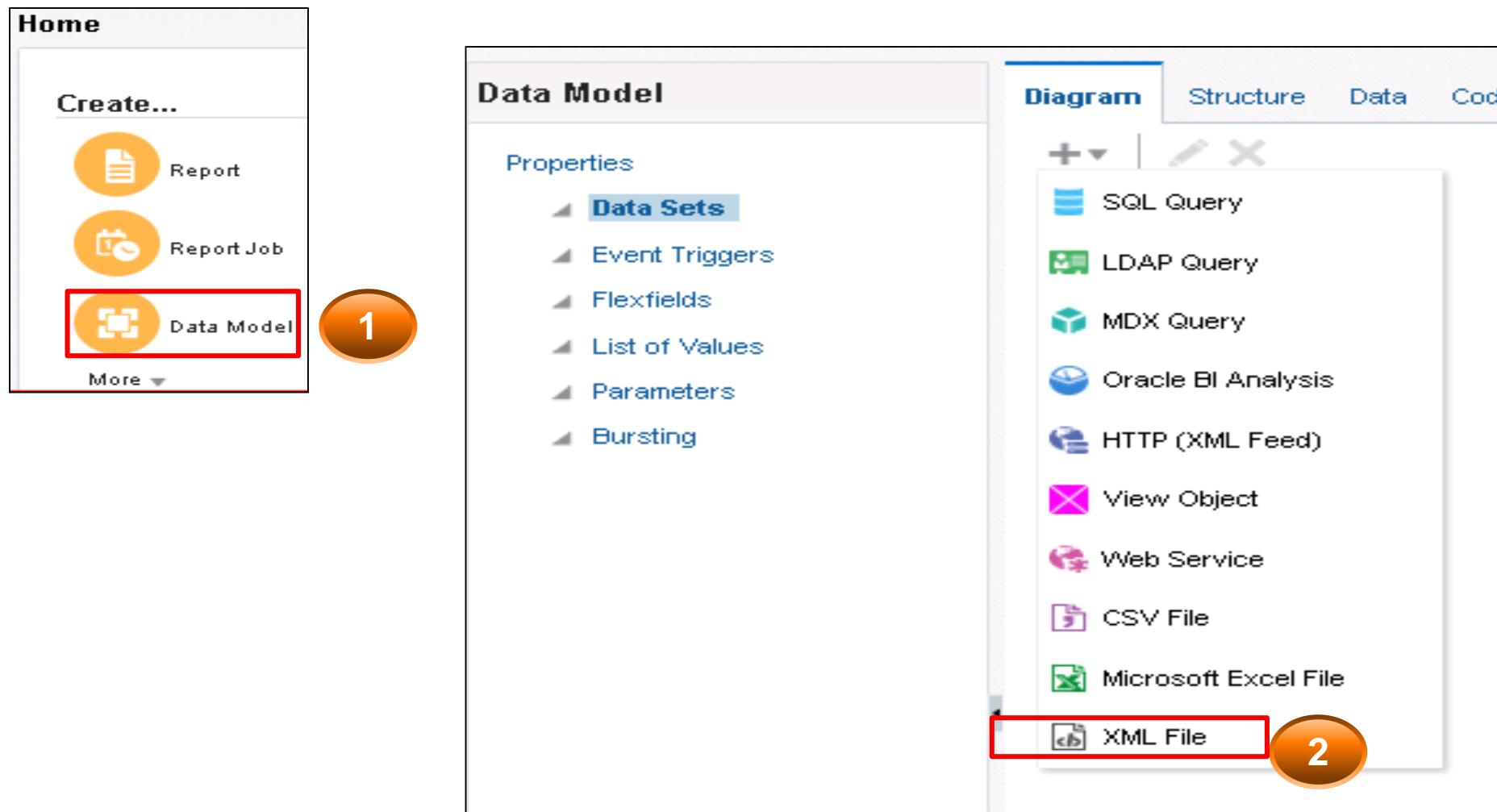
The image shows two windows side-by-side. On the left is the 'Create Report' wizard, step 1, titled 'Select Data'. It features a 'Use Data Model' button and a 'Data Model' dropdown set to '/~weblogic/Learn/Emp_DataMod'. A large orange circle labeled '1' highlights the 'Use Data Model' button. Below it, under 'How do you want to create your report?', there are two radio buttons: 'Guide Me' (selected) and 'Use Report Editor'. On the right is the 'NewsReport' application window, step 2. The title bar says 'NewsReport' and includes links for Home, Catalog, Favorites, Dashboard, New, Open, and Signed In. An orange circle labeled '2' highlights the 'New' button. The main content area is titled 'NewsReport' and displays a table of news articles:

Title	Category	Pubdate	Description
NYT > Business Day	Silicon Valley (Calif)	Fri, 12 Nov 2010 06:05:14 GMT	Hoping some of Twitter's success will rub off on their start-ups jostle to rent office in the same San Francisco building.
NYT > Business Day		Fri, 12 Nov 2010 06:21:26 GMT	The resistance to President Obama's approach puts him odds with his key allies and largest trading partners on fundamental issues of economic strategy.
NYT > Business Day	United States Interi Relations	Fri, 12 Nov 2010 03:28:46 GMT	President Obama and South Korea's leader gave negotiators more time to work out differences over Korean imports of American autos and beef.
NYT > Business Day	Ackermann, Josef	Fri, 12 Nov 2010 07:20:01 GMT	The daylong Seoul G-20 Business Summit led to an unusual juxtaposition of corporate and world leaders with some businessmen expressing concern for criticism aimed at them.
NYT > Business Day	Top Headline 1	Fri, 12 Nov 2010 03:07:25 GMT	Morgan Stanley and the quiet team led by Peter Muller are negotiating a spinoff, the latest retreat from proprietary trading by a Wall Street firm.
NYT > Business Day		Fri, 12 Nov 2010 05:52:16 GMT	Tina Brown is to become

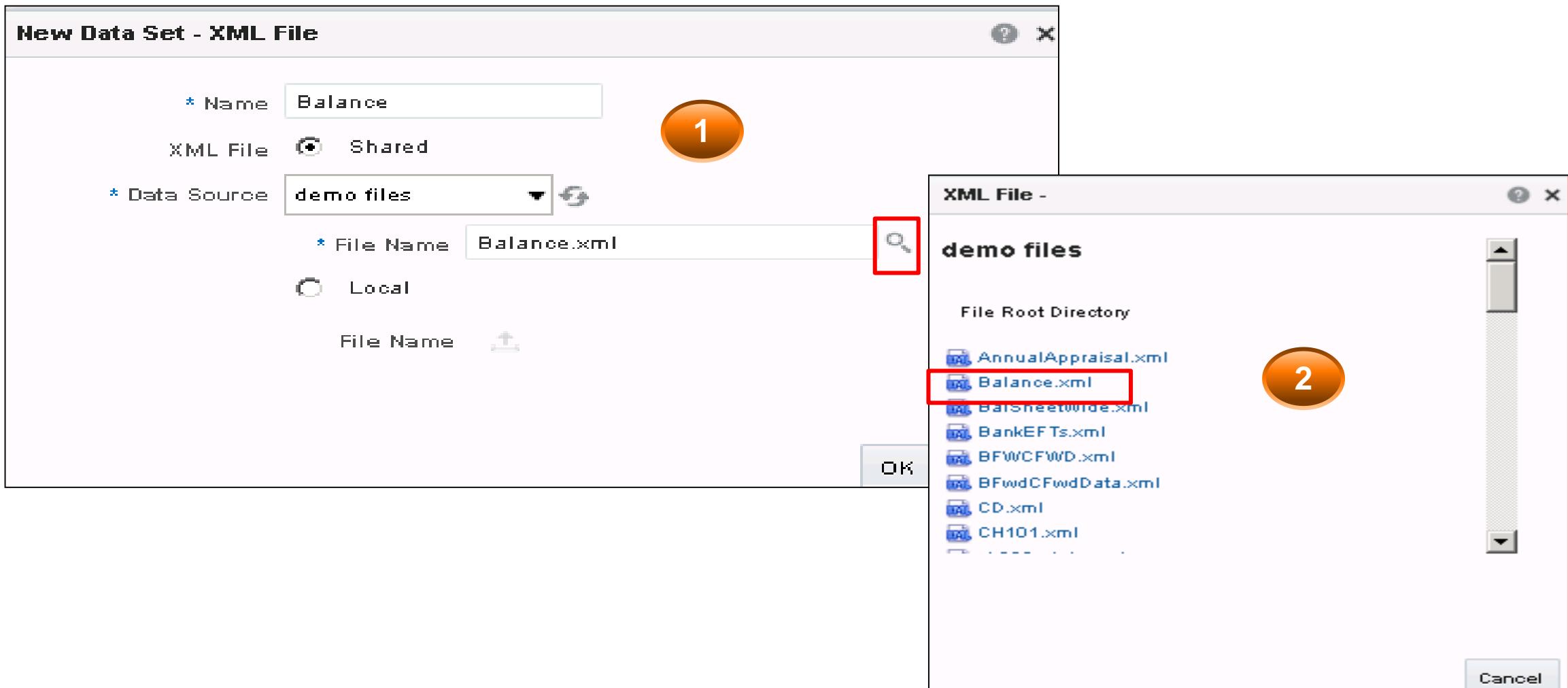
Creating a BI Publisher Report Based on an XML File

1. Define XML as a data set.
2. View the data.
3. Create and view the report.

Step 1: Defining an XML File as a Data Set



Step 1: Defining an XML File as a Data Set



Step 2: Viewing the Data

The screenshot shows the SAP Data Modeler interface. On the left, the 'Data Model' sidebar lists properties like Data Sets, Event Triggers, Flexfields, etc. The main area displays an ARXCOBLX schema with G_CUSTOMER and G_CURRENCY tables. The G_CUSTOMER table contains fields such as CUSTOMER_NUMBER, CUSTOMER_NAME, ADDRESS_LINE1, ADDRESS_LINE2, ADDRESS_LINE3, ADDRESS_LINE4, CITY, STATE, ZIP, COUNTRY, AS_OF_DATE, TAX_REFERENCE_NUM, and ORGANIZATION_NAME. The G_CURRENCY table contains TRX_CURRENCY_CODE. The G_INVOICES table contains TRX_NUMBER. At the top, tabs for Diagram, Structure, Data (selected), and Code are visible. Below the tabs, there are buttons for Rows (set to 5), View (highlighted with a red box and orange circle 1), Export, Save As Sample Data (highlighted with a red box and orange circle 2), and View Engine Log. In the top right, buttons for Manage Private Data Sources, View Data, Create Report, and a refresh icon are shown. A red box highlights the refresh icon, and an orange circle labeled 3 points to it.

Step 3: Creating a Report

The screenshot illustrates the process of creating a report. It shows two windows: the "Create Report" dialog box and the resulting report view.

Create Report Dialog:

- Toolbar buttons: Select Data, Select Layout, Create Chart, Create 2nd Chart, Create Table, Save Report.
- Buttons: Use Data Model (highlighted with a red box), Upload Spreadsheet, Use Subject Area.
- Text area: "Create a report using an existing Data Model".
- Text input: "Data Model /~weblogic/Learn/Ch 11 XML.xdm" with a search icon.

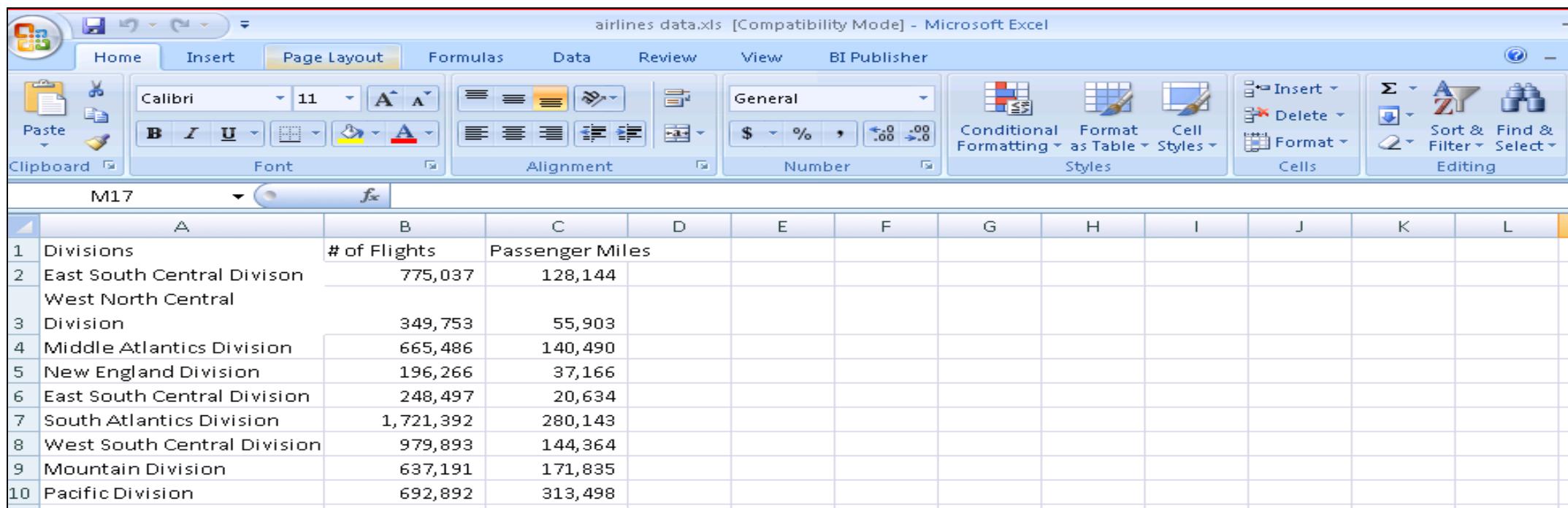
Report View:

- Header: "Ch 11 XML" (highlighted with a red arrow pointing from the dialog).
- Sub-header: "Ch 11 XML".
- Navigation: Home, Catalog, New, Open, Signed In As weblogic.
- Table:

Customer Name	Trans Amount Remaining	C Inv Open Balance	C As Of Date Display
Vision Operations	19125	31500	01 January 2004
Vision Operations	12375	31500	01 January 2004
Vision Operations	132733.84	3365647.81	01 January 2004
Vision Operations	71577.42	3365647.81	01 January 2004
Vision Operations	89344.81	3365647.81	01 January 2004
Vision Operations	11250	3365647.81	01 January 2004
Vision Operations	128654.96	3365647.81	01 January 2004
Vision Operations	120653.2	3365647.81	01 January 2004
Vision Operations	147328.21	3365647.81	01 January 2004
Vision Operations	53.35	3365647.81	01 January 2004
	3397147.81	9.430113868000004E7	

Creating a BI Publisher Report Based on an MS Excel Spreadsheet

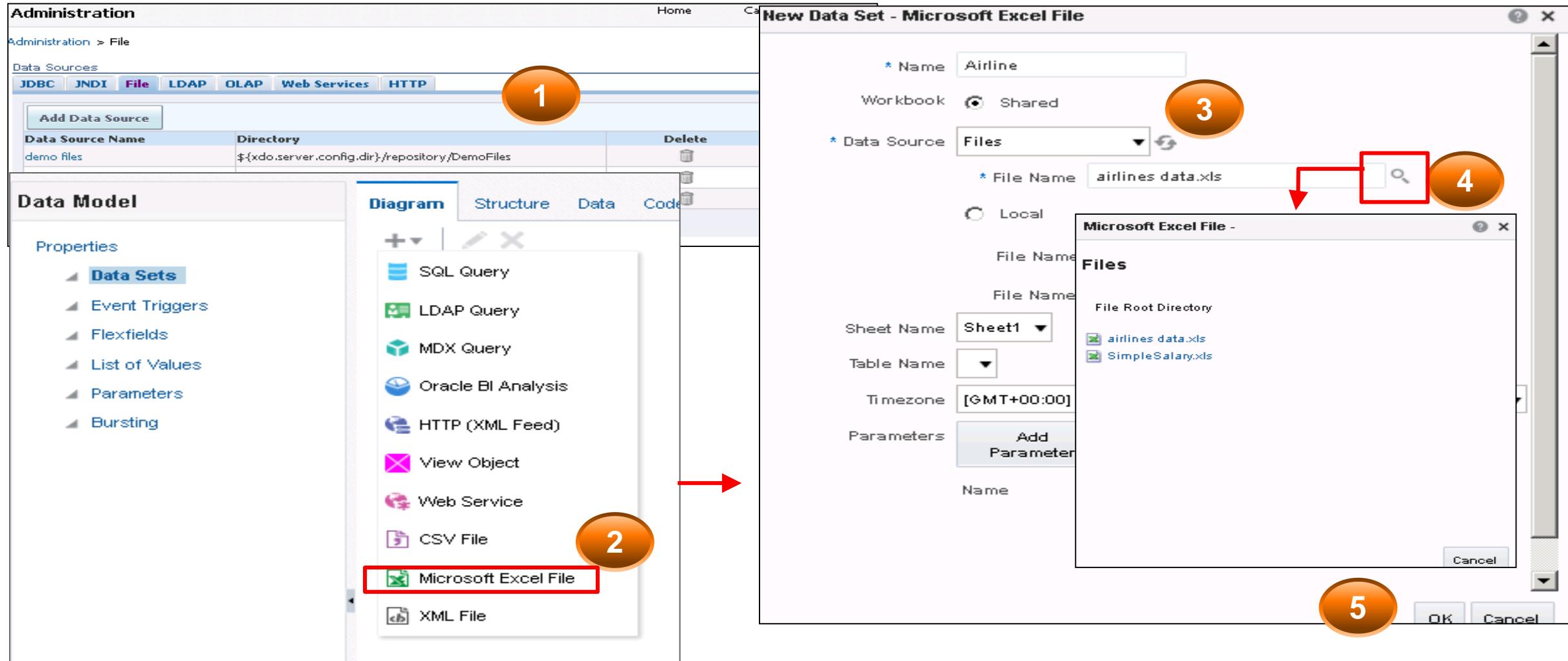
1. Define an MS Excel spreadsheet as a data set.
2. View the data.
3. Create a report.



The screenshot shows a Microsoft Excel spreadsheet titled "airlines data.xls [Compatibility Mode] - Microsoft Excel". The ribbon menu includes Home, Insert, Page Layout, Formulas, Data, Review, View, and BI Publisher. The BI Publisher tab is selected. The data is presented in a table with columns A through L. The first row contains column headers: "Divisions", "# of Flights", and "Passenger Miles". Rows 2 through 10 list different airline divisions with their respective flight counts and passenger miles.

	A	B	C	D	E	F	G	H	I	J	K	L
1	Divisions	# of Flights	Passenger Miles									
2	East South Central Division	775,037	128,144									
3	West North Central Division	349,753	55,903									
4	Middle Atlantics Division	665,486	140,490									
5	New England Division	196,266	37,166									
6	East South Central Division	248,497	20,634									
7	South Atlantics Division	1,721,392	280,143									
8	West South Central Division	979,893	144,364									
9	Mountain Division	637,191	171,835									
10	Pacific Division	692,892	313,498									

Step 1: Defining an MS Excel Spreadsheet as a Data Set



Step 2: Viewing the Data

The screenshot shows a Data Model interface titled "Untitled". The top navigation bar includes "Home", "Catalog", "New", "Open", "Signed In As weblogic", and buttons for "Manage Private Data Sources", "View Data", "Create Report", and a help icon. Below the navigation is a toolbar with "Diagram", "Structure", "Data" (highlighted with a red box and orange circle 1), and "Code". The toolbar also includes "Rows 5", "View" (highlighted with a red box and orange circle 2), "Export", "Save As Sample Data" (highlighted with a red box and orange circle 3), and "View Engine Log". The main content area displays a hierarchical data structure under "DATA_DS". The structure consists of four groups, each containing a "DIVISIONS" node and two "OF_FLIGHTS" nodes. The groups are labeled G_1 through G_4. Group G_1 has DIVISIONS (East South Central Division) with OF_FLIGHTS (775037) and PASSENGER_MILES (128144). Group G_2 has DIVISIONS (West North Central Division) with OF_FLIGHTS (349753) and PASSENGER_MILES (65903). Group G_3 has DIVISIONS (Middle Atlantics Division) with OF_FLIGHTS (665486) and PASSENGER_MILES (140490). Group G_4 has DIVISIONS (New England Division) with OF_FLIGHTS (196266) and PASSENGER_MILES (37166). Group G_5 has DIVISIONS (East South Central Division) with OF_FLIGHTS (248497) and PASSENGER_MILES (20634).

Division	OF_FLIGHTS	PASSENGER_MILES
East South Central Division	775037	128144
West North Central Division	349753	65903
Middle Atlantics Division	665486	140490
New England Division	196266	37166
East South Central Division	248497	20634

Step 3: Creating a Report

Create Report

Select Data Select Layout Create Chart Create 2nd Chart Create Table Save Report

Use Data Model Upload Spreadsheet Use Subject Area

Create a report using an existing Data Model

Data Model: /~weblogic/Learn/My Airline.xdm

My Airline

How do you want to create your report?

Guide Me

My Airline

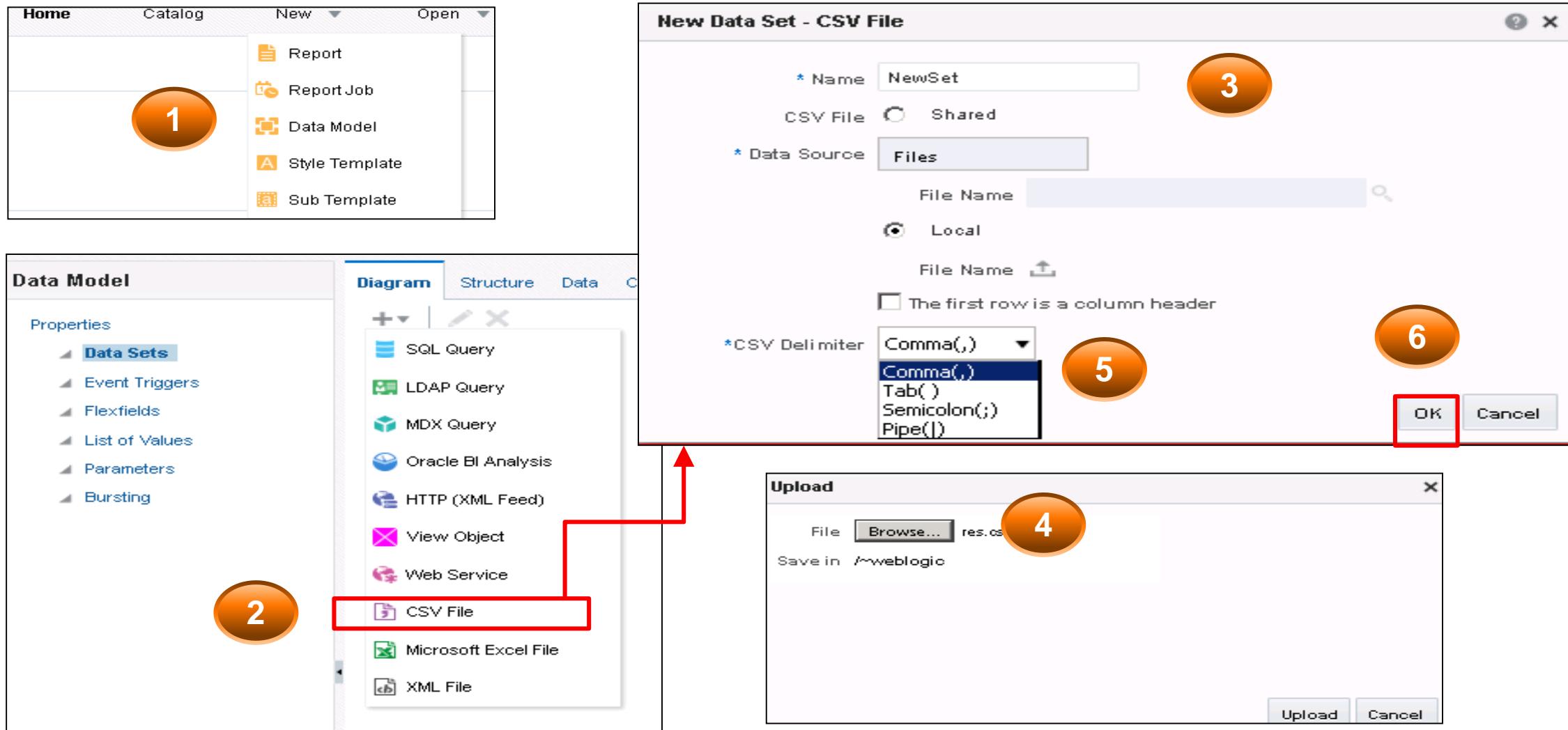
My Airline

Divisions	# of Flights	Passenger Miles
East South Central Division	775037	128144
West North Central Division	349753	55903
Middle Atlantics Division	665486	140490
New England Division	196266	37166
East South Central Division	248497	20634
South Atlantics Division	1721392	280143
West South Central Division	979893	144364
Mountain Division	637191	171835
Pacific Division	692892	313498
	6266407	1292177

Creating a BI Publisher Report Based on CSV Data Set

1. Define a CSV file as a data set.
2. View the data.
3. Create a report

Step 1: Defining a CSV File as a Data Set



Step 2: Viewing the Data

The screenshot shows a data modeling application window titled "Untitled". The interface includes a top navigation bar with "Home", "Catalog", "New", "Open", "Signed In As weblogic", and buttons for "Manage Private Data Sources", "View Data", "Create Report", and a help icon. Below the navigation is a toolbar with "Diagram", "Structure", "Data" (which is selected and highlighted with a red box), and "Code". The main area displays a data set named "DATA_DS" with 5 rows. The columns are labeled "COLUMN1", "COLUMN2", and "COLUMN3". The data is organized into four groups (G_1) and one individual row.

Row	COLUMN1	COLUMN2	COLUMN3
1	COLUMN1 (ID)	COLUMN2 (NAME)	COLUMN3 (BIRTHDAY)
2	COLUMN1 (1)	COLUMN2 (fred)	COLUMN3 (1-Jan-2012)
3	COLUMN1 (2)	COLUMN2 (sally)	COLUMN3 (1-Sep-2012)
4	COLUMN1 (3)	COLUMN2 (sue)	COLUMN3 (1-May-2012)
5			

Annotations with orange circles and numbers:

- Annotation 1: A red box highlights the "Data" tab in the toolbar.
- Annotation 2: A red box highlights the "View" button in the toolbar.
- Annotation 3: A red box highlights the "Create Report" button in the toolbar.
- Annotation 4: A red box highlights the "Save As Sample Data" button in the toolbar.

Step 3: Creating a Report

Create Report

Select Data Select Layout Create Chart Create 2nd Chart Create Table Save Report

Use Data Model **Upload Spreadsheet** **Use Subject Area**

Create a report using an existing Data Model

Data Model /~weblogic/Learn/Ch 11 CSV.xdm

My CSV

How do you want to cr
Guide Me

My CSV

column2	column3
NAME	BIRTHDAY
Fred	1-Jan-2012
sally	1-Sep-2012
sue	1-May-2012

Home Catalog New Open Signed In As weblogic

Previous Next Cancel **Finish**

The screenshot shows the 'Create Report' dialog box. At the top, there are tabs for 'Select Data', 'Select Layout', 'Create Chart', 'Create 2nd Chart', 'Create Table', and 'Save Report'. Below these are three buttons: 'Use Data Model' (highlighted with a red box), 'Upload Spreadsheet', and 'Use Subject Area'. A section titled 'Create a report using an existing Data Model' contains a 'Data Model' input field with the value '/~weblogic/Learn/Ch 11 CSV.xdm' and a search icon. Below this is a preview area titled 'My CSV' showing a table with columns 'column2' and 'column3'. The table has four rows with data: NAME (Fred, sally, sue) and BIRTHDAY (1-Jan-2012, 1-Sep-2012, 1-May-2012). The preview area also includes a 'Guide Me' button. At the bottom of the dialog are navigation buttons: 'Previous', 'Next', 'Cancel', and 'Finish' (highlighted with a red box and an arrow pointing to it).

Quiz: Overview

This quiz examines your knowledge of the concepts discussed in the lesson.

Quiz

BI Publisher can use SQL Query, web service, XML, and Oracle BI Analysis data sources.

- a. True
- b. False

Quiz

When creating a web service data source, you make a distinction between simple and complex data types for the web service data model that you are defining.

- a. True
- b. False

Quiz

When creating an MS Excel data source, you can use any spreadsheet format.

- a. True
- b. False

Quiz

When creating a CSV file source, the file must be UTF-8 encoded and cannot contain empty column headers.

- a. True
- b. False

Summary

In this lesson, you should have learned how to create a BI Publisher report based on:

- Web services
- HTTP (XML/RSS feed)
- An XML file
- MS Excel spreadsheet
- A CSV file

Practice 11: Overview

This practice covers Creating a BI Publisher report based on:

- An XML file
- A CSV file
- Web services
- HTTP (XML/RSS feed)

Performing Translations

Objectives

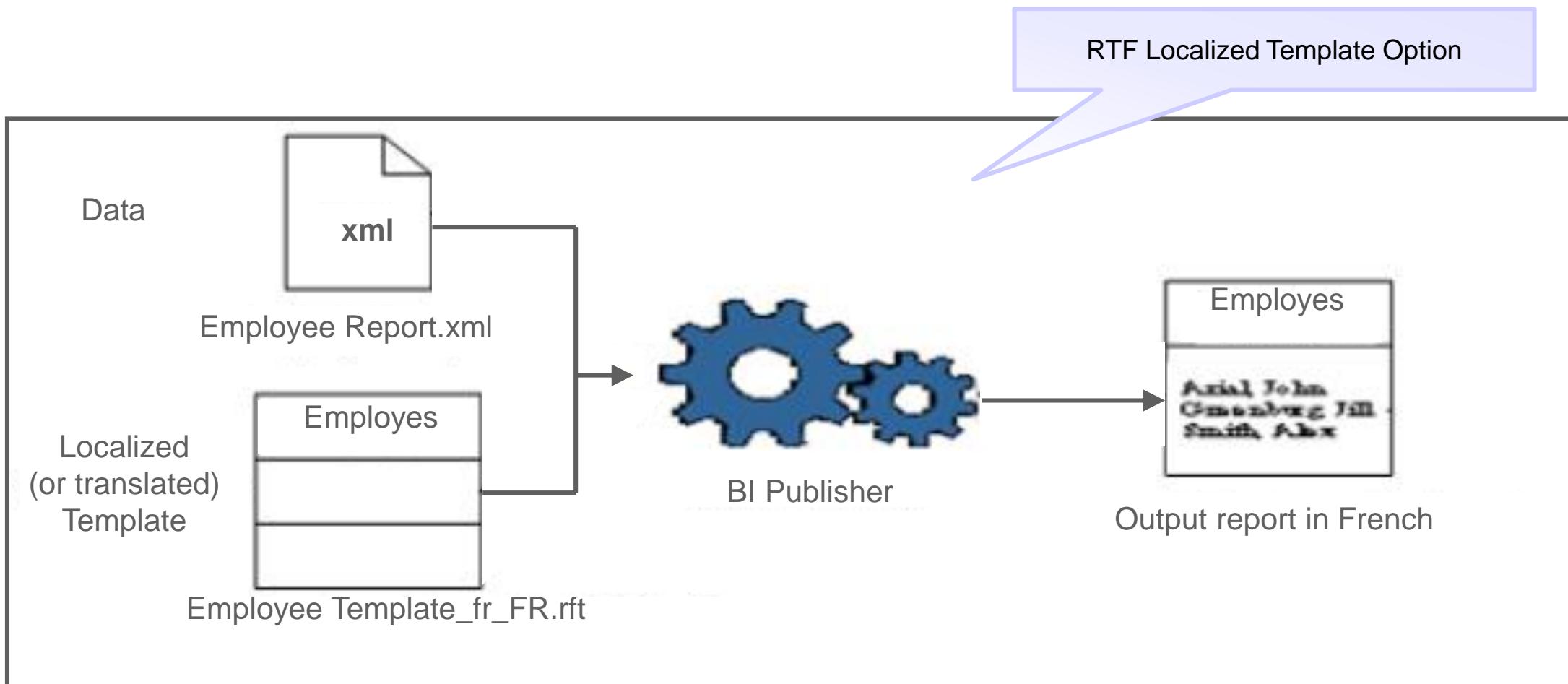
After completing this lesson, you should be able to do the following:

- Describe the types of translations and the options available in BI Publisher for performing translations
- Create a localized template for translations by using Template Builder
- Create a translation file by using BI Publisher Enterprise Edition

Translation Types

- Two types of translations:
 - **Localized Template (or Layout)**: A separate, translated RTF-based template
 - **XML Localization Interchange File Format (XLIFF)**: Generated from the original template
- File types that can be translated include:
 - RTF layout files
 - Style Templates
 - Sub Templates
 - BI Publisher layout files (.xpt)

Translating Using a Localized Template



Using the Localized Template Option: Process Overview

1. Design the localized RTF layout template, Sub Template, or Style Template.
2. Upload the localized file to Template Manager.

Step 1: Designing the Localized Template

The screenshot shows a Microsoft Word document titled "Balance Letter Finished.rtf [Compatibility Mode] - Microsoft Word". The ribbon tabs are Home, Insert, Page Layout, References, Mailings, Review, View, Developer, and BI Publisher. The Home tab is selected. The ribbon has several toolbars: Clipboard, Font, Paragraph, Styles, and Editing.

The main content area contains the following text and table:

ORACLE

CUSTOMER_NAME
ADDRESS_LINE1
ADDRESS_LINE2
CITY, STATE ZIP
COUNTRY

Bonjour Monsieur/Madame,

Selon nos dossiers, du AS_OF_DATE, nous montrons les soldes suivants ouverte.

Votre TRX_CURRENCY_CODE l'équilibre est \$100.00 composé comme suit:

Numéro de Facture	Date	Montant de la Transaction	Montant de la Transaction Reste
F TRX_NUMBER	01-Jan-2007	\$1,000.00	\$500.00 E

S'il vous plaît confirmer les informations ci-dessus.

Au revoir,

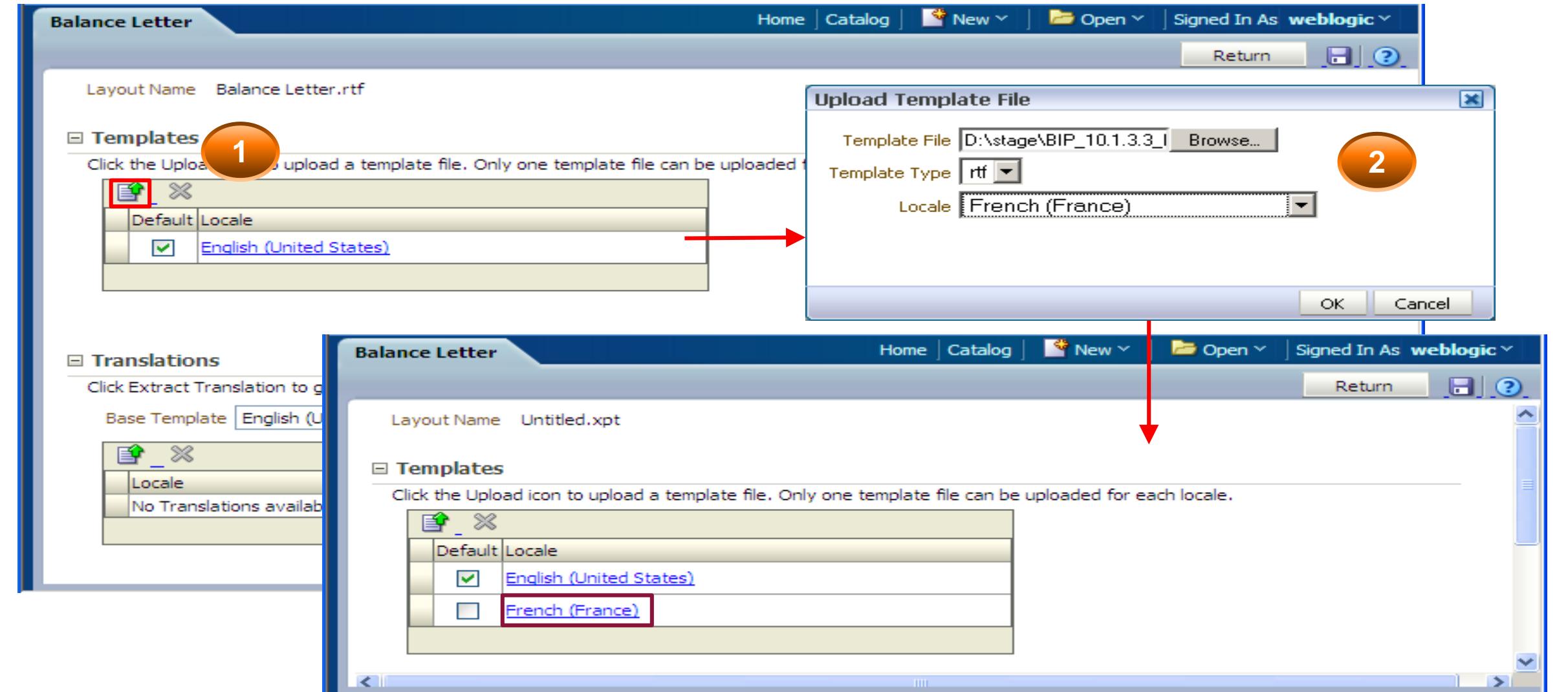
Yours faithfully,

Receivables Manager

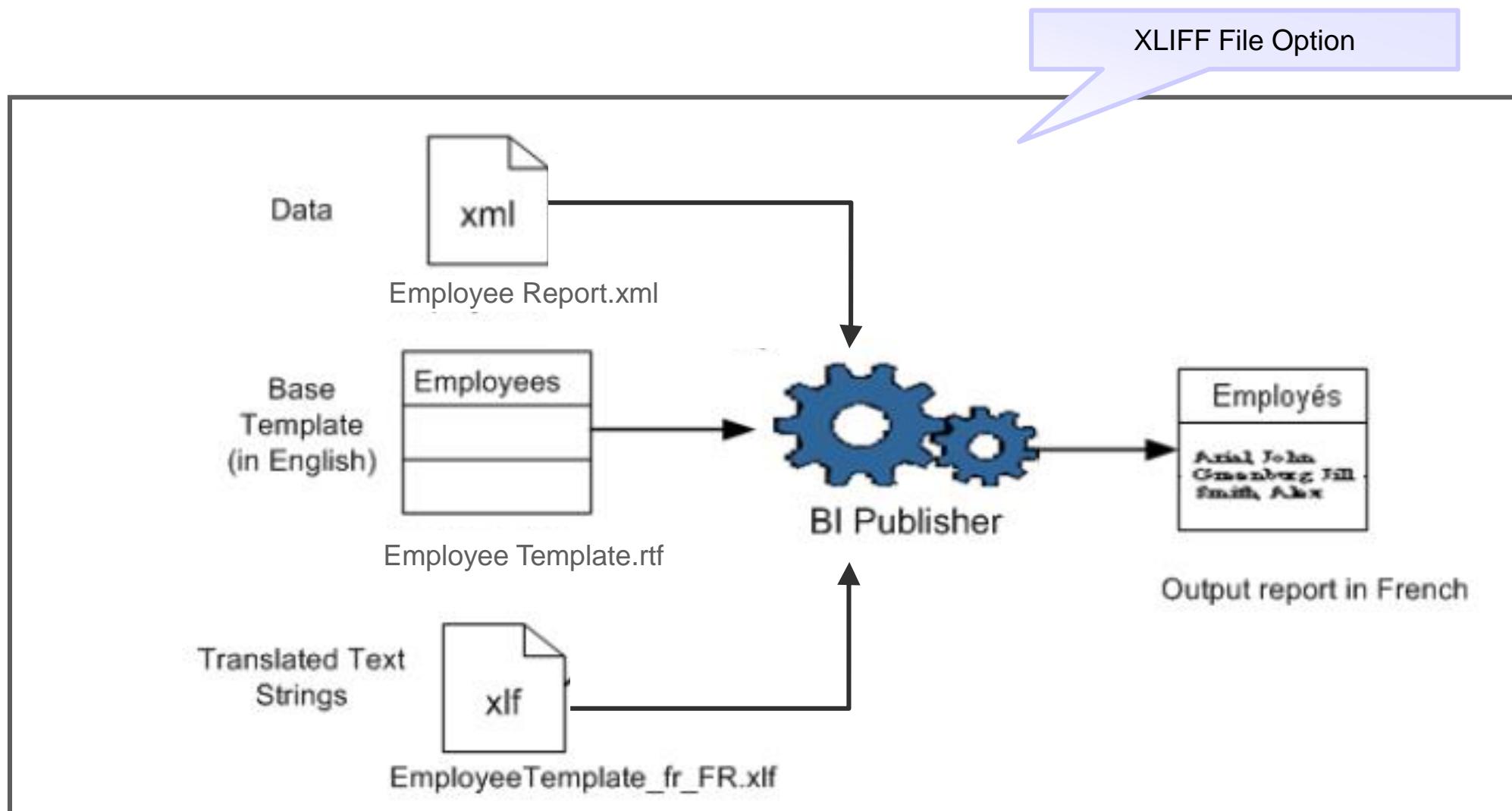
A callout bubble with a blue arrow points from the text "Edit the report and make the appropriate entries." to the word "Normal" in the Styles section of the ribbon.

Page: 1 of 1 Words: 60 French (France) 80%

Step 2: Uploading the Localized File to Template Manager



Translating by Using XLIFF



Structure of an XLIFF File

```
source-language  
Attribute  
  
target-language  
Attribute  
  
Embedded Data Field  
  
<?xml version = '1.0' encoding = 'utf-8'?>  
<xliff version="1.0">  
  <file source-language="en-US" target-language="en-US" datatype="XDO" original="orphaned">  
    <header/>  
    <body>  
      <trans-unit id="d678c24b" maxbytes="4000" maxwidth="90" size-unit="char" translid="1">  
        <source>Italian Purchase VAT Register - [&#1] </source>  
        <target>Italian Purchase VAT Register - [&#1] </target>  
        <note>Text located: header/table, token &#1:anonymous placeholder(s)</note>  
      </trans-unit>  
      <trans-unit id="4d3eb24" maxbytes="4000" maxwidth="15" size-unit="char" translid="2">  
        <source>Total</source>  
        <target>Total</target>  
        <note>Text located: body/table</note>  
      </trans-unit>  
      <trans-unit id="aeccc17e" maxbytes="4000" maxwidth="37" size-unit="char" translid="3">  
        <source>Non-Recoverable</source>  
        <target>Non-Recoverable</target>  
        <note>Text located: body/table</note>  
      </trans-unit>  
      .  
      .  
      .  
    </body>  
  </file>  
</xliff>
```

source and target elements

Excerpt from an XLIFF file
that has not been translated

XLIFF File Attributes

```
source-language Attribute          target-language Attribute      Embedded Data Field  
<?xml version = '1.0' encoding = 'utf-8'?>  
<xlf:file source-language="en-US" target-language="en-US" datatype="XDO" original="orphaned">  
  <xlf:header/>  
  <xlf:body>  
    <xlf:trans-unit id="d678c24b" maxbytes="4000" maxwidth="90" size-unit="char" translatable="yes">  
      <xlf:source>Italian Purchase VAT Register - [&#1] </xlf:source>  
      <xlf:target>Italian Purchase VAT Register - [&#1] </xlf:target>  
      <xlf:note>Text located: header/table, token &#1:anonymous place</xlf:note>  
    </xlf:trans-unit>  
  </xlf:body>  
</xlf:file>
```

source and target elements

Source/target-language codes

Table of translations example

Translation
(Language/Territory)

source-language Examples

target-language Examples

From English/US to
English/Canada

en-US

en-CA

From English/US to
Chinese/China

en-US

zh-CN

From Japanese/Japan to
French/France

ja-JP

fr-FR

XLIFF File Embedded Data Fields

	source-language Attribute	target-language Attribute	Embedded Data Field
source and target elements	<?xml version = '1.0' encoding = 'utf-8'?> <xliff version="1.0"> <file source-language="en-US" target-language="en-US" datatype="XDO" original="orphaned"> <header/> <body>		
			<trans-unit id="d678c24b" maxbytes="4000" maxwidth="90" size-unit="char" translatable="yes"> <source>Italian Purchase VAT Register - [] </source> <target>Italian Purchase VAT Register - [] </target> <note>Text located: header/table, token :anonymous placeholder(s)</note> </trans-unit>
			<trans-unit id="4d3eb24" maxbytes="4000" maxwidth="15" size-unit="char" translatable="yes"> <source>Total</source> <target>Total</target> <note>Text located: body/table</note> </trans-unit>
			<trans-unit id="aeccc17e" maxbytes="4000" maxwidth="37" size-unit="char" translatable="yes"> <source>Non-Recoverable</source> <target>Non-Recoverable</target> <note>Text located: body/table</note> </trans-unit> . . .
			</body> </file> </xliff>

XLIFF File Elements

```
<?xml version = '1.0' encoding = 'utf-8'?>
<xliff version="1.0">
  <file source-language="en-US" target-language="en-US" datatype="XDO" original="orphan">
    <header/>
    <body>
      <trans-unit id="d678c24b" maxbytes="4000" maxwidth="90" size-unit="char" translid="T1">
        <source>Italian Purchase VAT Register - [amp;1]</source>
        <target>Italian Purchase VAT Register - [amp;1]</target>
        <note>Text located: header/table, token &1:anonymous placeholder(s)</note>
      </trans-unit>
      <trans-unit id="4d3eb24" maxbytes="4000" maxwidth="15" size-unit="char" translid="T2">
        <source>Total</source>
        <target>Total</target>
      </trans-unit>
    </body>
  </file>
</xliff>
```

source-language Attribute
target-language Attribute
Embedded Data Field
source and target elements

Original example updated with Chinese translation

Update target-language to the appropriate locale

```
<?xml version = '1.0' encoding = 'utf-8'?>
<xliff version="1.0">
  <file source-language="en-US" target-language="zh-CN" datatype="XDO" original="orphan">
    <header/>
    <body>
      <trans-unit id="d678c24b" maxbytes="4000" maxwidth="90" size-unit="char" translid="T1">
        <source>Italian Purchase VAT Register - [amp;1]</source>
        > <target>意大利购买VAT 记数器 - [amp;1]</target>
        <note>Text located: header/table, token &1:anonymous placeholder(s)</note>
      </trans-unit>
      <trans-unit id="4d3eb24" maxbytes="4000" maxwidth="15" size-unit="char" translid="T2">
        <source>Total</source>
        > <target>共计</target>
        <note>Text located: body/table</note>
      </trans-unit>
      <trans-unit id="aeccc17e" maxbytes="4000" maxwidth="37" size-unit="char" translid="T3">
        <source>Non-Recoverable</source>
        > <target> 非恢复性</target>
        <note>Text located: body/table</note>
      </trans-unit>
    </body>
  </file>
</xliff>
```

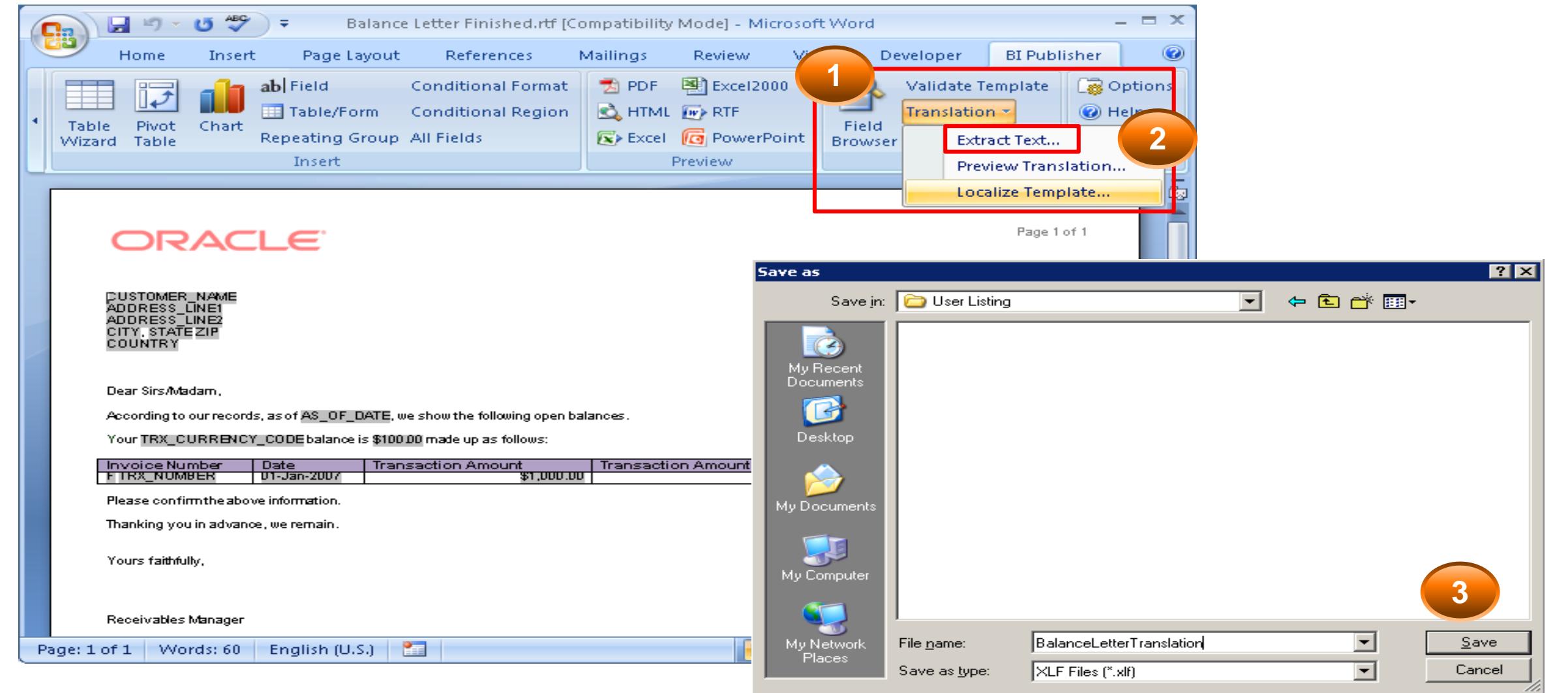
Original example: `<source>` and `<target>`

Update `<target>` elements with translation of `<source>` elements

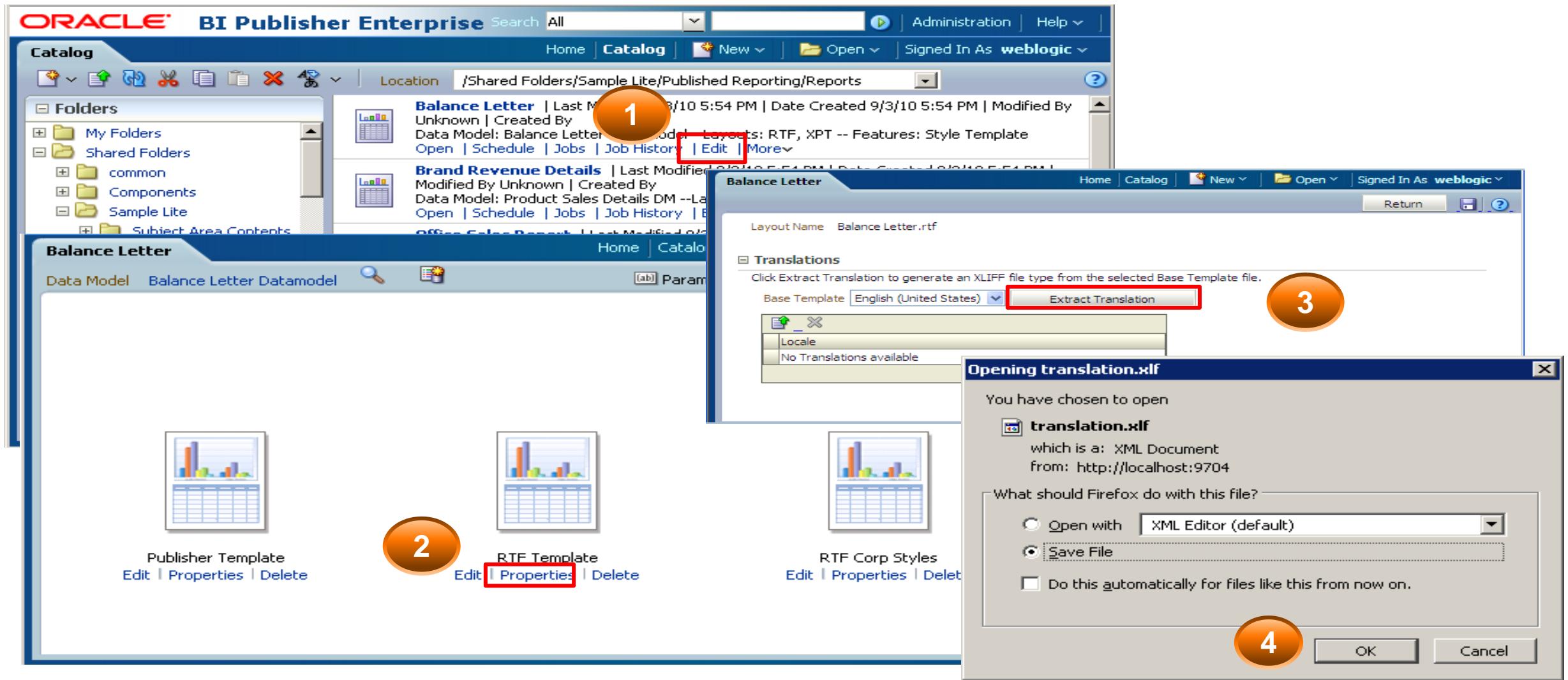
Using the XLIFF Option: Process Overview

1. Generate the XLIFF file from the RTF or BI Publisher (XPT) template.
 - The following are the two methods for generating the XLIFF for a single template file:
 - Generate the XLIFF file by using Template Builder for MS Word. (This method is not supported for XPT templates.)
 - Generate the XLIFF file from the Layout Properties page.
2. Translate the strings.
3. Preview by using Template Builder.
4. Upload the translation.

Step 1: Generating the XLIFF File by Using Template Builder (Method 1)



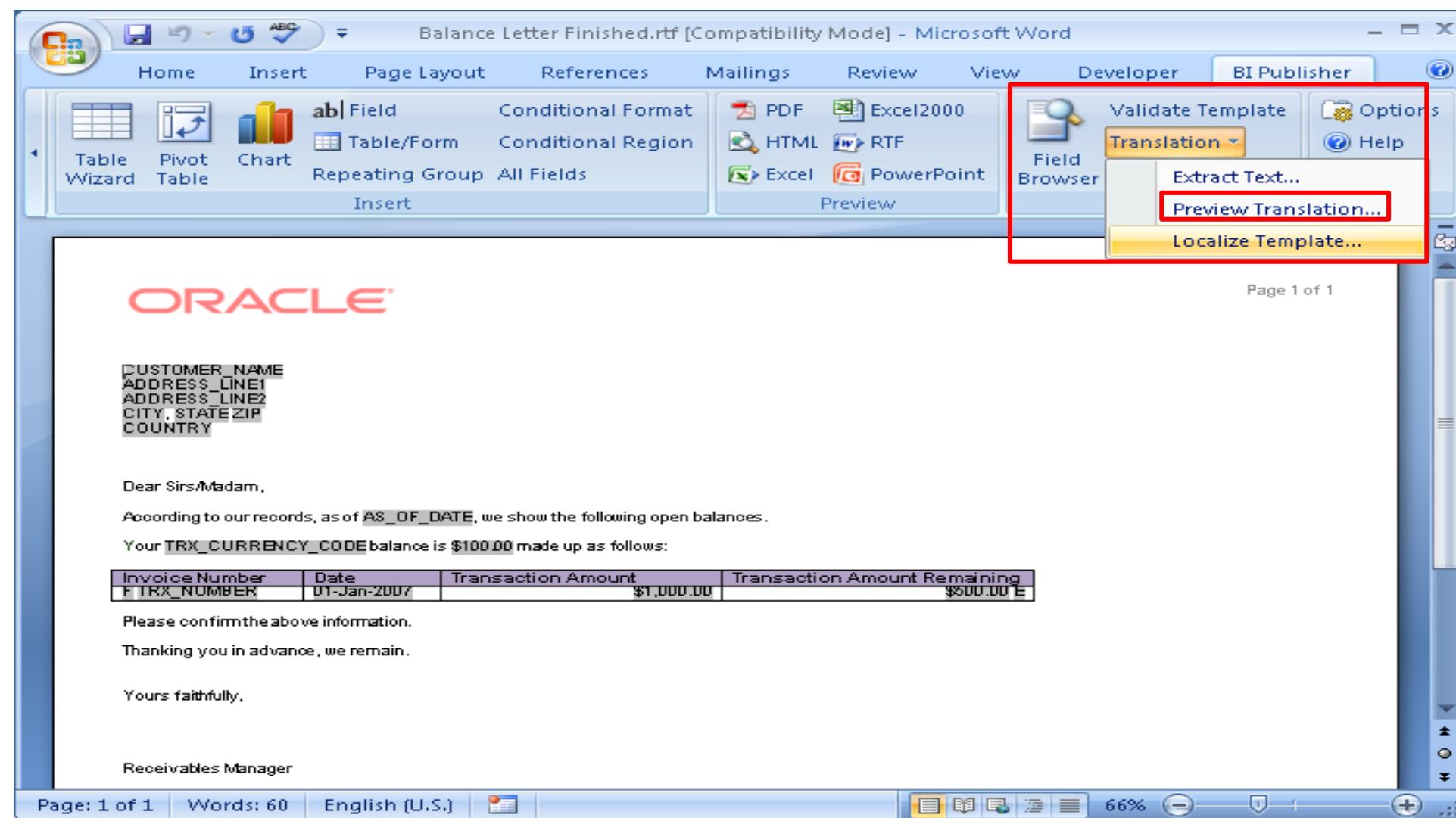
Step 1: Generating the XLIFF File from the Layout Properties Page (Method 2)



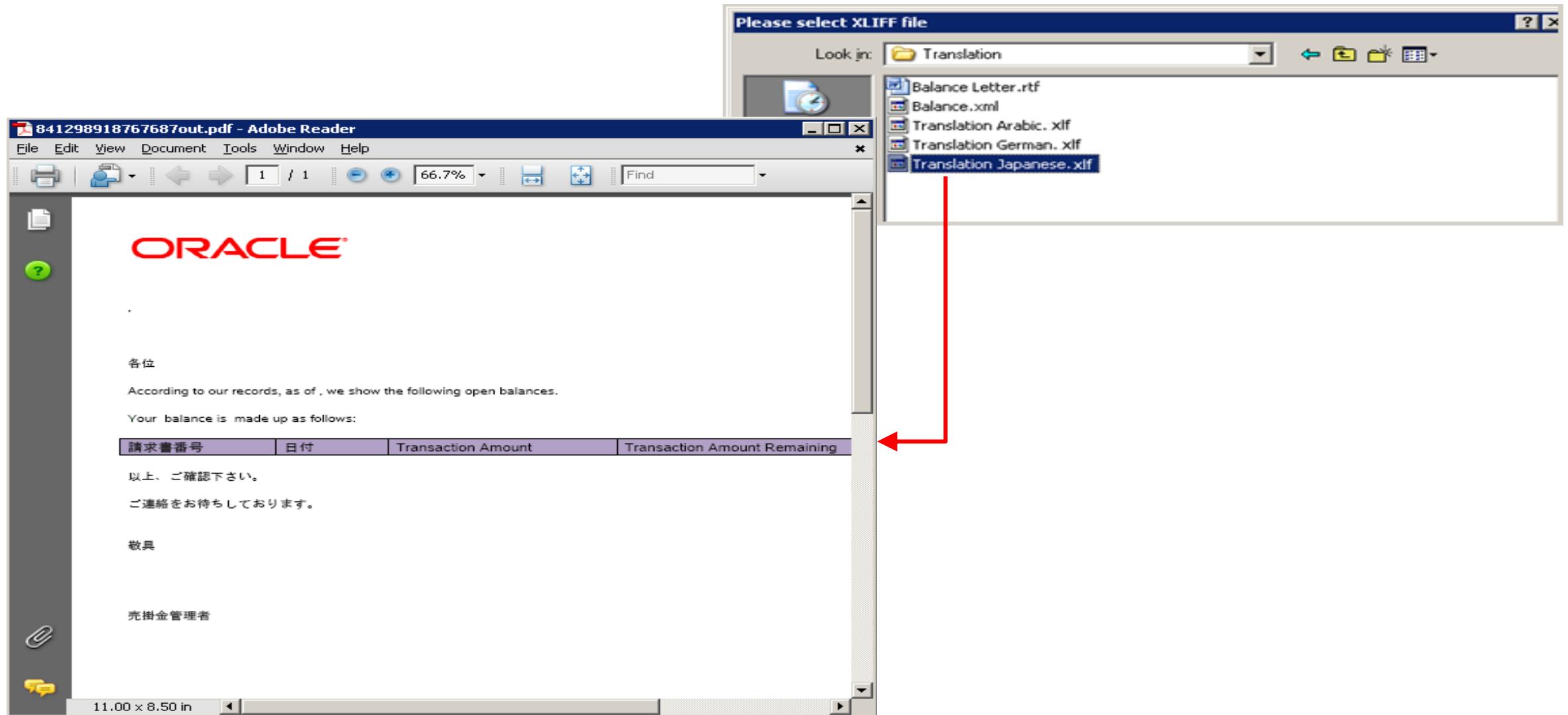
Step 2: Translating the Strings

```
<?xml version = '1.0' encoding = 'utf-8'?>
<xlf version="1.0">
  <file source-language="en-US" target-language="fr-FR" datatype="xml" product-version="11.1.1.0">
    <body>
      <trans-unit xml:space="preserve" id="43">
        <source>[&0][&1]</source>
        <target>[&0][&1]</target>
      </trans-unit>
      <trans-unit xml:space="preserve" id="44">
        <source>[&0][&1]</source>
        <target>[&0][&1]</target>
      </trans-unit>
      <trans-unit xml:space="preserve" id="45">
        <source>[&0]N[&0]</source>
        <target>[&0]N[&0]</target>
      </trans-unit>
      <trans-unit xml:space="preserve" id="46">
        <source>[&0],[&1]N[&1][&0]À</source>
        <target>[&0],[&1]N[&1][&0]À</target>
      </trans-unit>
      <trans-unit xml:space="preserve" id="47">
        <source>[&0]Dear Sir/Madam,[&1]À[&2][&0]</source>
        <target>[&0]Bonjour Monsieur/Madame,[&1]À[&2][&0]</target>
      </trans-unit>
      <trans-unit xml:space="preserve" id="48">
        <source>[&0]</source>
        <target>[&0]According to our<br/>Selon nos dossier</target>
      </trans-unit>
      <trans-unit xml:space="preserve" id="49">
        <source>[&0]</source>
        <target>[&0][&1]n[&1],<br/>[&1]n[&1]</target>
      </trans-unit>
      <trans-unit xml:space="preserve" id="50">
        <source>[&0]</source>
        <target>[&0]Your<br/>Votre</target>
      </trans-unit>
      <trans-unit xml:space="preserve" id="51">
        <source>[&0]</source>
        <target>[&0][&1]n[&1],<br/>[&1]n[&1]</target>
      </trans-unit>
    </body>
  </file>
</xlf>
```

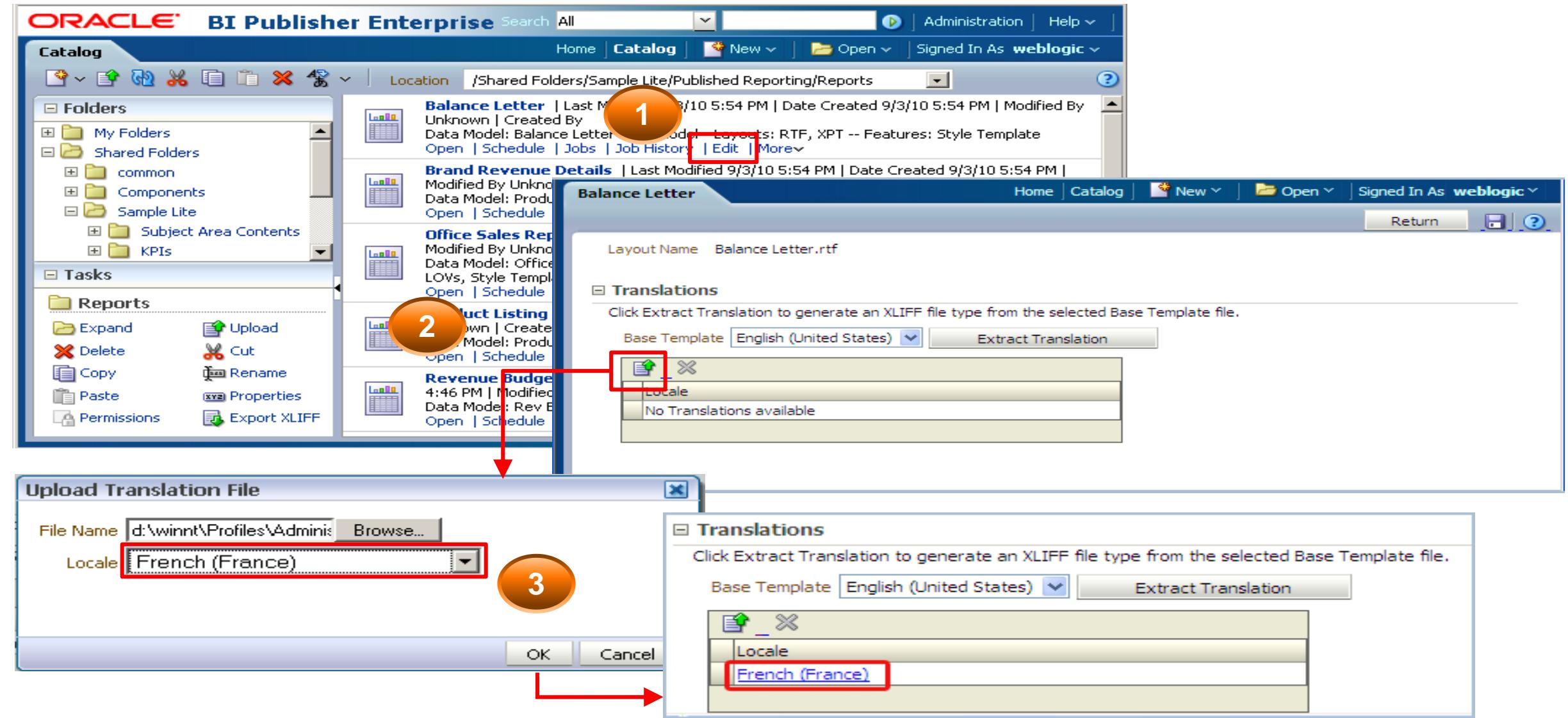
Step 3: Previewing Using Template Builder



Step 3: Previewing Using Template Builder



Step 4: Uploading the Translation



Managing XLIFF Translations on BI Publisher Server

Two methods:

- **Template translation:** Extract and upload a separate localized translation for RTF Templates.
- **Catalog translation:** Extract and upload translations for all objects in a selected Catalog folder into a single XLIFF file.

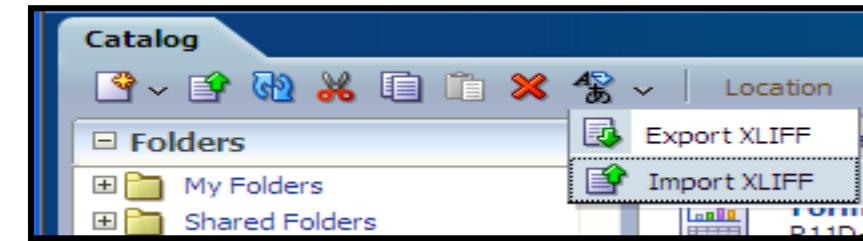
The Overall Translation Process

1. You extract translatable strings for a Catalog or template translation.
2. BI Publisher creates an XLIFF file.
3. Strings are translated locally.
4. Upload the translated XLIFF file to the Catalog or template.
5. Assign the appropriate locale.

Catalog Translations

Use the Export XLIFF command at the Catalog level to export the following objects:

- Folder
- Data Model
- Report Style Templates
- Sub Templates
- BI Publisher Layouts (XPT)
- RTF Layouts



User Preferences

The screenshot shows the Oracle BI Publisher Enterprise interface. On the left, there's a sidebar with options like 'Create ...' (Report, Report Job, Data Model, More), 'Browse/Manage ...' (Catalog Folders, Report Jobs, Report Job History), and 'Get Started ...' (Download BI Publisher, Help Contents, Oracle Technology Network). In the center, there's a 'Recent' section showing a 'My Revenue Report' with a bar chart. A callout box labeled 'Based on Report Locale and UI Language' points to the 'Report Locale' and 'UI Language' fields in the 'My Account' dialog. The 'My Account' dialog is overlaid on the main screen, showing fields for User ID (weblogic), Display Name (weblogic), General tab (selected), Report Locale (English (United States)), UI Language (English (United States)), Time Zone ([GMT+00:00] Casablanca), Accessibility Mode (On selected), and Email Addresses. A red arrow points from the 'My Account' dialog down towards the 'UI Language' field. The 'OK' and 'Cancel' buttons are at the bottom right of the dialog.

Based on Report Locale and UI Language

My Account

User ID: weblogic
Display Name: weblogic

General My Groups

Report Locale: English (United States)
UI Language: English (United States)

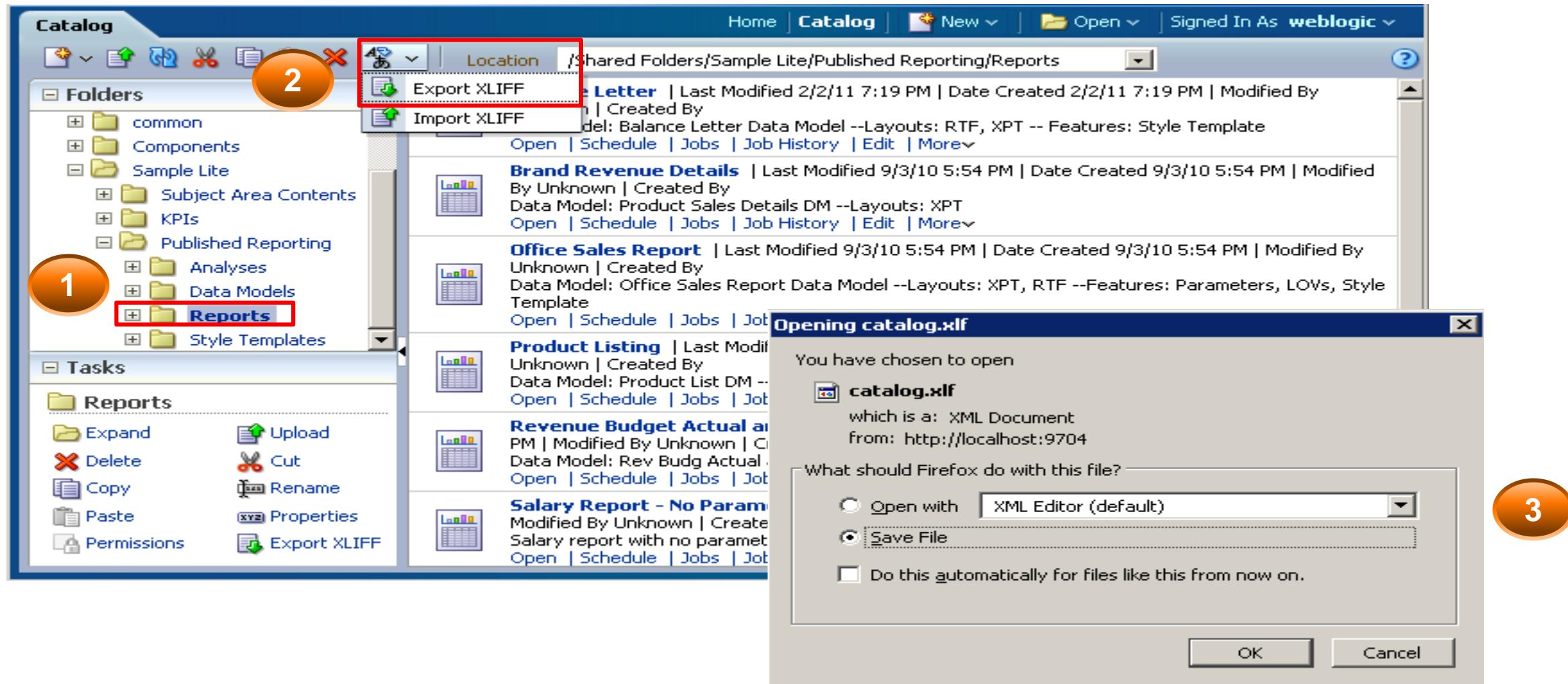
Time Zone: [GMT+00:00] Casablanca

Accessibility Mode: On Off

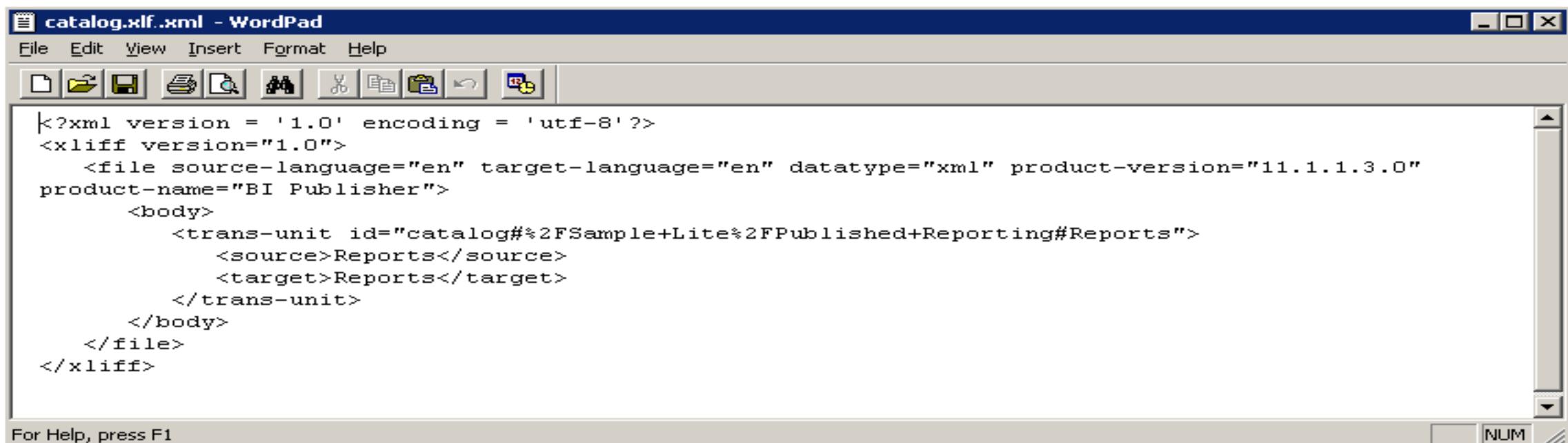
Email Addresses: _____

Help OK Cancel

Exporting the XLIFF File for a Catalog Folder



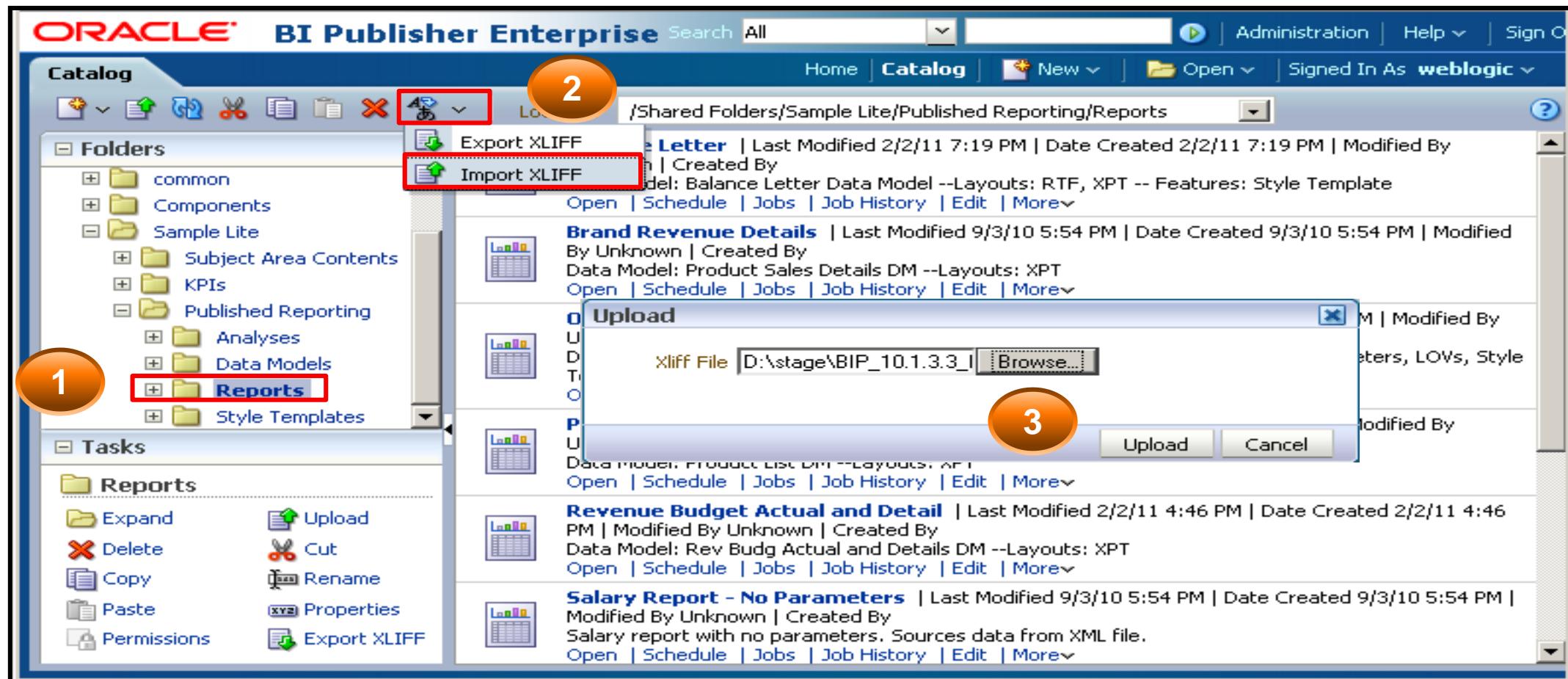
Viewing the Exported XLIFF File



The screenshot shows a Microsoft WordPad window titled "catalog.xlf.xml - WordPad". The window contains the XML code for an XLIFF file. The code defines a single trans-unit for the "Reports" string, mapping it from the source language ("en") to the target language ("en"). The XML structure includes the XML declaration, the XLIFF root element, file-level attributes, and the trans-unit element with its source and target strings.

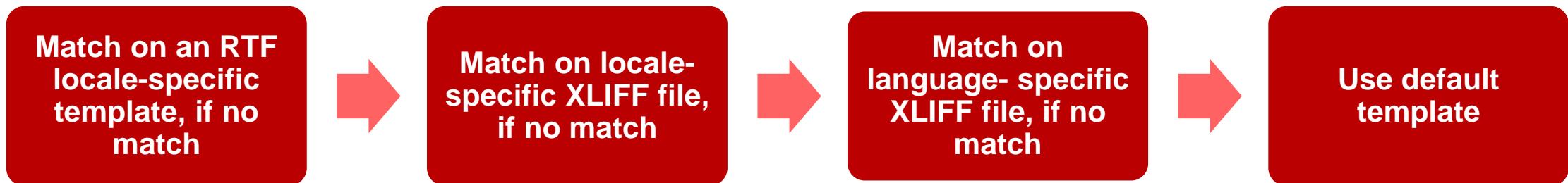
```
<?xml version = '1.0' encoding = 'utf-8'?>
<xliff version="1.0">
    <file source-language="en" target-language="en" datatype="xml" product-version="11.1.1.3.0"
product-name="BI Publisher">
        <body>
            <trans-unit id="catalog#%2FSample+Lite%2FPublished+Reporting#Reports">
                <source>Reports</source>
                <target>Reports</target>
            </trans-unit>
        </body>
    </file>
</xliff>
```

Importing the XLIFF File for a Catalog Folder



Locale Selection Logic at Run Time

Translation is applied based on the user's selected Report Locale as follows:



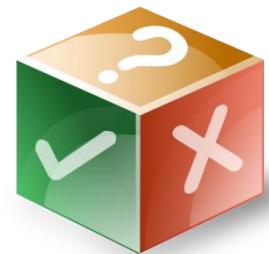
Summary

In this lesson, you should have learned how to:

- Describe the types of translations and the options available within BI Publisher for performing translations
- Create a localized template for translations by using Template Builder
- Create a translation file by using BI Publisher Enterprise Edition

Quiz: Overview

This quiz examines your knowledge of the concepts discussed in the lesson.



Quiz

You use Catalog translation when you only need the final report documents translated.

- a. True
- b. False



Quiz

When you extract the translatable strings for a Catalog or template translation, BI Publisher creates an XLIFF file that contains the strings to be translated.

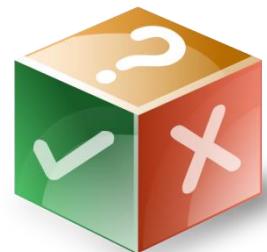
- a. True
- b. False



Quiz

BI Publisher applies a translation based on the user's Report Locale setting. BI Publisher tries to match an RTF template named for the locale, followed by an attempt to match an XLIFF file named for the locale.

- a. True
- b. False



Quiz

Catalog translation enables the extraction of translatable strings from all objects contained in a selected Catalog folder into a single translation file.

- a. True
- b. False