

Oracle BI Publisher 12c R1: Fundamentals

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Practices for Lesson 2:
Introduction to Oracle BI Publisher 12c

Practices for Lesson 2: Overview

Practices Overview

Complete the following quizzes to test your understanding of the concepts taught in this lesson.

Fill in the Blanks

1. BI Publisher breaks apart the three report-design components—_____ , _____ , and _____ —and treats them separately at design time.
2. Using _____ , you can generate documents that can then be delivered via multiple delivery channels based on the recipient's choice.
3. Oracle BI Publisher _____ is available for quick downloading and installation, but not for Oracle BIEE Integrated features.
4. The Oracle _____ hardware is a single server that is optimally configured for in-memory analytics for BI workloads.
5. The trial version of Oracle BI Publisher includes self-contained WebLogic Server and _____ .

State whether the following statements are true or false

1. Oracle BI Foundation Suite is composed of Oracle BI EE, BI Publisher, Oracle Essbase, Oracle Scorecard, and Strategy Management.
True/False
2. BI Publisher cannot extract data from multiple data sources.
True/False
3. BI Publisher has the ability to publish multiple times by using the same data source.
True/False
4. BI Publisher cannot support:
 - a. Chinese, Japanese, Korean
 - b. Bidirectional languages
 - c. Unicode
 - d. Multiple Language Support
True/False
5. There is no way to use Oracle Reports as Oracle BI Publisher reports.
True/False

Practices for Lesson 2: Solution

Fill in the Blanks

1. BI Publisher breaks apart the three report-design components—data logic, layout, and translation—and treats them separately at design time.
2. Using Oracle BI Publisher, you can generate documents that can then be delivered via multiple delivery channels based on the recipient's choice.
3. Oracle BI Publisher trial edition is available for quick downloading and installation, but not for the Oracle BIEE Integrated features.
4. The Oracle Exalytics In-Memory Machine hardware is a single server that is optimally configured for in-memory analytics for BI workloads.
5. The trial version of Oracle BI Publisher includes self-contained WebLogic Server and Java Derby database.

State whether the following statements are true or false

1. Oracle BI Foundation Suite is composed of Oracle BI EE, BI Publisher, Oracle Essbase, Oracle Scorecard, and Strategy Management.
True
2. BI Publisher cannot extract data from multiple data sources.
False
3. BI Publisher has the ability to publish multiple times by using the same data source.
True
4. BI Publisher cannot support:
 - a. Chinese, Japanese, Korean
 - b. Bidirectional Languages
 - c. Unicode
 - d. Multiple Language Support
False
5. There is no way to use Oracle Reports as Oracle BI Publisher reports.
False

**Practices for Lesson 3: BI
Publisher: Technology and Architecture**

Practices for Lesson 3: Overview

Practices Overview

Complete the following quizzes to test your understanding of the concepts taught in this lesson.

Fill in the Blanks

1. The various functional components for BI Publisher are _____, _____, and _____.
2. _____ includes a guided workflow for creating simple reports.
3. _____ enables you to build a single document from multiple data source and template combinations, or create individual documents for each combination.
4. _____ enables you to split a single report based on a key in the report data and deliver the report based on a second key in the report data.
5. _____ converts RTF eText templates to XSL and merges the XSL with XML to produce text output for EDI and EFT transmissions.

State whether the following statements are true or false

1. BI Publisher's multitier architecture does not include a client tier, a middle tier, and a data tier.
True/False
2. BI Publisher Enterprise Server Architecture provides a complete, easy-to-use, template-based reporting and publishing solution.
True/False
3. RTF Processor merges XSL and XML data file to produce multiple output documents.
True/False
4. You cannot burst reports with conditional triggers.
True/False
5. XML data, by its nature, generates large objects and files, and these can cause serious memory issues during processing. BI Publisher has a stream-based implementation that reduces memory footprint, thereby enabling large XML input files to be processed.
True/False

Practices for Lesson 3: Solution

Fill in the Blanks

1. The various functional components for BI Publisher are BI Publisher Server, Data Model Editor, Report Editor, Layout Editor, and Template Builder.
2. Create Report Wizard includes a guided workflow for creating simple reports.
3. Document Processor enables you to build a single document from multiple data source and template combinations, or create individual documents for each combination.
4. Bursting enables you to split a single report based on a key in the report data and deliver the report based on a second key in the report data.
5. RTF Processor converts RTF eText templates to XSL and merges the XSL with XML to produce text output for EDI and EFT transmissions.

State whether the following statements are true or false

1. BI Publisher's multitier architecture does not include a client tier, a middle tier, and a data tier.
False (BI Publisher's multitier architecture includes client, middle, and data tiers.)
2. BI Publisher Enterprise Server Architecture provides a complete, easy-to-use, template-based reporting and publishing solution.
True
3. RTF Processor merges XSL and XML data file to produce multiple output documents.
False (FO Engine)
4. You cannot burst the reports with conditional triggers.
False
5. XML data, by its nature, generates large objects and files, and these can cause serious memory issues during processing. BI Publisher has a stream-based implementation that reduces memory footprint, thereby enabling large XML input files to be processed.
True

Practices for Lesson 4: Getting Started with BI Publisher

Practices for Lesson 4: Overview

Goal

To explore the BI Publisher UI, to create and save a simple report based on a sample data model, and to create another report against the BIEE subject area.

Practices Overview

You log in to BI Publisher, browse the Catalog, and explore preferences. You create and save a simple report based on an existing data model and view it.

Time

30–40 minutes

Practice 4-1: Signing In to BI Publisher and Setting Preferences

Assumptions

You create a simple report based on a predefined data model, add layouts, and save the report in your private folder.

Practice Overview

In this practice, you will log in to BI Publisher as a user with BI Administrator privileges. You explore your preferences, browse the Catalog, and open a predefined report.

Tasks

1. Open BI Publisher. Enter the URL for BI Publisher in a browser window by using the following format: `http://<hostname>:<port>/xmlpserver/`.
Example: <http://localhost:9502/xmlpserver/>.
Your instructor can provide you with the correct URL, username, and password.
2. Sign in. On the sign-in screen for BI Publisher, enter the username and password for the user with BI Administrator privileges.

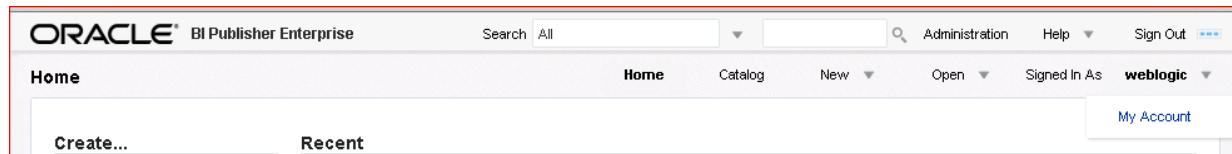
Username: weblogic

Password: weblogic1

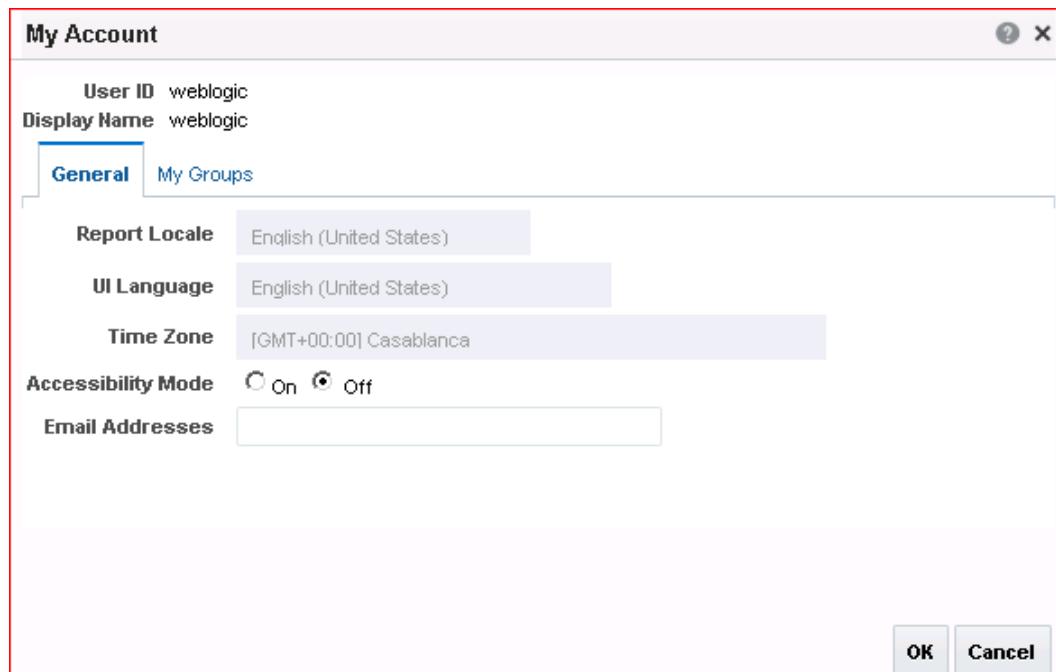
The screenshot shows the Oracle BI Publisher Enterprise login interface. At the top left is the 'ORACLE® BI Publisher Enterprise' logo. Below it is a 'Sign In' form with the placeholder text 'Please enter username and password'. It contains two input fields: 'Username' with 'weblogic' typed in and 'Password' with several asterisks. There is also an 'Accessibility Mode' checkbox. A large 'Sign In' button is centered below the form. At the bottom of the form is a language selection bar with a globe icon and the text 'English (United States)'. A red border surrounds the entire sign-in form. At the very bottom of the page, there is a small copyright notice: 'Oracle BI Publisher 12.2.1.0.0 Copyright © 2003, 2015, Oracle and/or its affiliates. All rights reserved.'

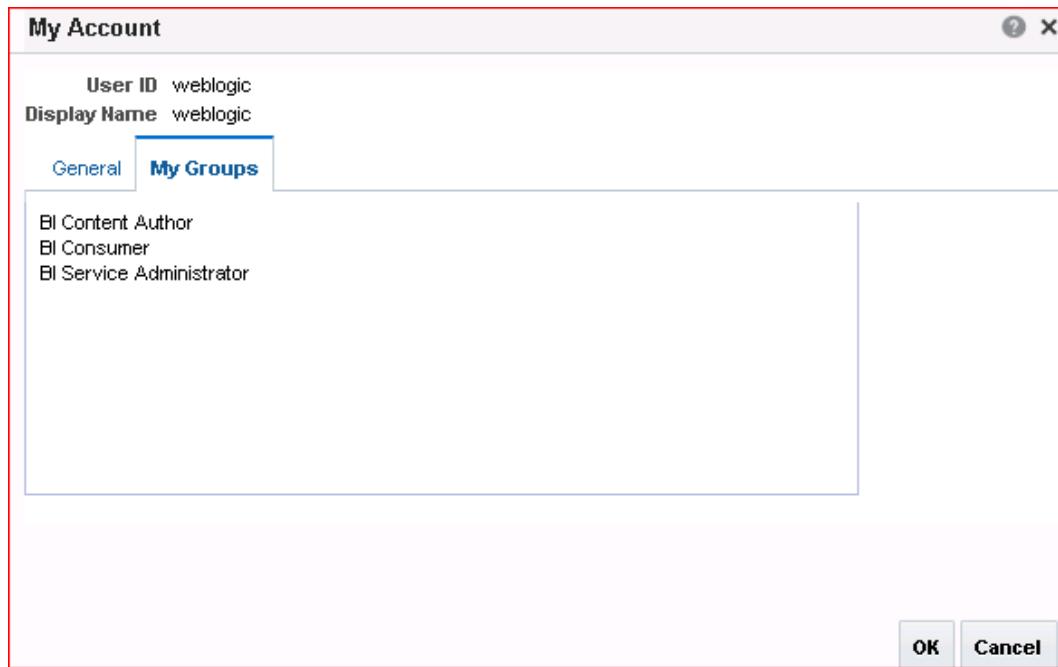
3. Click **Sign In**. When you sign in, the **Home** page appears.

4. Set your preferences. To set your preferences, click the “Signed in as <user>” link, and select **My Account** from the drop-down list.



5. The My Account dialog box appears with two tabs: General and My Groups. The Password tab is enabled only when you use BI Publisher Security. Review the settings on these tabs, accept the defaults, and do not change anything—your lab environment uses Fusion Middleware Security and already has all the appropriate settings.





Note: If you are running BI Publisher integrated with a security model other than BI Publisher, these preferences may be inherited from the other security model, and you will not be able to change them.

Click **Cancel**.

Practice 4-2: Creating and Modifying JDBC Connections

Practice Overview

In this practice, you create a JDBC connection for the OE schema (part of the Oracle database in the classroom environment) and you modify an existing JDBC connection for Demo Files.

Assumptions

To perform the tasks in this practice, you should have:

- Administrative privileges
- Oracle Database 12 (or Oracle Database 11g) installed along with the sample schemas, HR and OE, unlocked
- Oracle BI Enterprise Edition 12c installed (including Oracle BI Publisher 12c Enterprise Edition)
- All Oracle BI EE services and Oracle Database up and running

Tasks

1. Log in to BI Publisher (if not already logged in) as a user with BI Administrator privileges.
2. To define a JDBC connection, click the **Administration** link located on the right side of the BI Publisher page.



3. The Administration page appears. Note the different sections available on the Administration page. Click **JDBC Connection** in the Data Sources section.

Data Sources

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

System Maintenance

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

Security Center

- Security Configuration
- Roles and Permissions
- Digital Signature

Runtime Configuration

- Properties
- Font Mappings
- Currency Formats

Delivery

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

Integration

- Oracle BI Presentation Services

4. The **Data Sources** page appears. In the JDBC section, click **Add Data Source** to create a JDBC connection to your database.

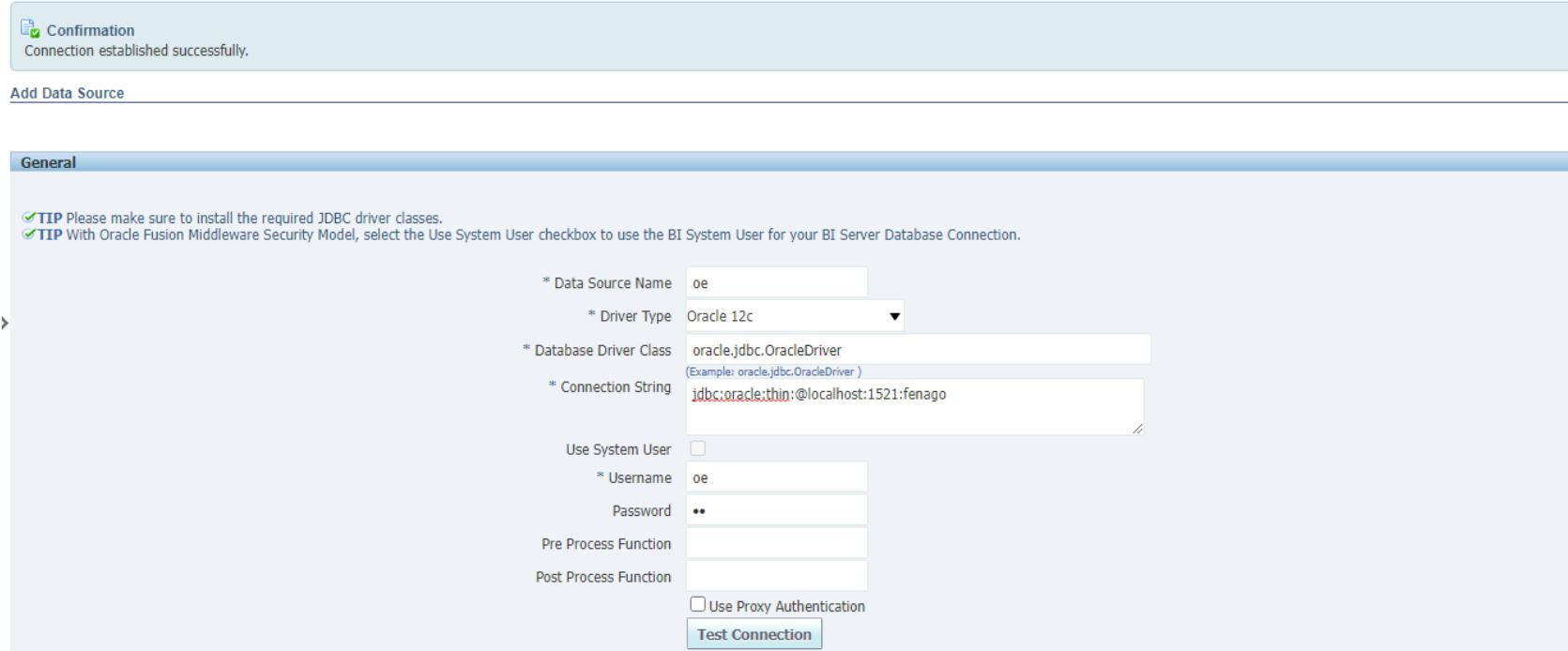
Data Source Name	Connection String	Delete
demo	jdbc:oracle:thin:@localhost:1521:orcl	
Oracle BI EE	jdbc:oraclebi://EDVMR1PO:9514/	

5. On the Add Data Source page, enter the following details:

Step	Name	Values
a.	Data Source Name	oe (Enter in lowercase.)
b.	Driver Type	Select Oracle 12c. This is the driver type for the classroom database.
c.	Database Driver Class	Enter <code>oracle.jdbc.OracleDriver</code> This is a driver class for the classroom database.
d.	Connection String	Provide the database connection detail in the format <code><hostname>:<port>:<sid></code> . Note: For your practice, the string should look like this: <code>jdbc:oracle:thin:@localhost:1521:fenago</code> However, confirm these details with your instructor.
e.	Username	oe (database username; enter in lowercase)
f.	Password	oe (database user password; enter in lowercase)

Your Data Source page should look like the following screenshot.

Administration > JDBC > Add Data Source



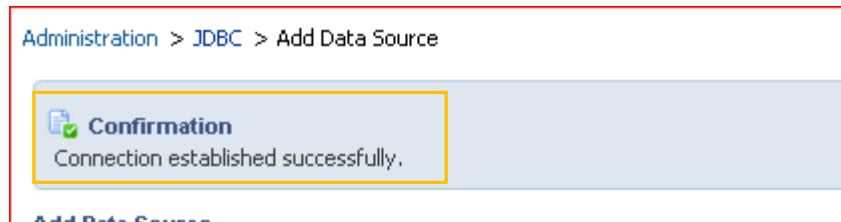
The screenshot shows the 'Add Data Source' page with a confirmation message: 'Confirmation Connection established successfully.' Below this, the 'General' tab is selected. The form fields are as follows:

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

TIP messages at the top of the form:

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

6. Do not click **Apply** or **Cancel** after entering the preceding details. Click **Test Connection**. If the connection is established properly, a confirmation message appears directly beneath the Administration tab as indicated in the following screenshot.



7. Click **Apply** when the connection is properly established. The data source appears in the Data Sources table.

Data Sources		
JDBC	JNDI	File
Add Data Source		
Data Source Name oe	Connection String jdbc:oracle:thin:@localhost:1521:fenago	Delete
Oracle BI EE	jdbc:oraclebi://oracleclass.wqjd0lbk03du3fq5oq4sahjfbh.cx.internal.cloudapp.net:9504/	Delete

8. Click “Add Data Source” button again and input Data source name “**demo**” and set random username/password for now and save it. We will update it to points to the OE schema in database, because other practices will use this association. Click the link for **demo**.

Data Sources		
JDBC	JNDI	File
Add Data Source		
Data Source Name demo	Connection String jdbc:oracle:thin:@[host]:[port]:[sid]	Delete
oe	jdbc:oracle:thin:@localhost:1521:fenago	Delete
Oracle BI EE	jdbc:oraclebi://oracleclass.wqjd0lbk03du3fq5oq4sahjfbh.cx.internal.cloudapp.net:9504/	Delete

9. On the “Update Data Source: demo” page, enter the following details:

Step	Name	Values
a.	Driver Type	Select Oracle 12c. This is the driver type for the classroom database.
b.	Database Driver Class	Enter <code>oracle.jdbc.OracleDriver</code> . This is a driver class for the classroom database.
c.	Connection String	Provide the database connection detail in the format <code><hostname>:<port>:<sid></code> . Note: For your practice, the string should look like this: <code>jdbc:oracle:thin:@localhost:1521:fenago</code> However, confirm these details with your instructor.
d.	Username	oe (database username)
e.	Password	oe (database user password)

Your Data Source page should look like the following screenshot:

The screenshot shows the 'Update Data Source: oe' dialog box. The 'General' tab is active. The 'Driver Type' dropdown is set to 'Oracle 12c'. The 'Database Driver Class' input field contains 'oracle.jdbc.OracleDriver'. The 'Connection String' input field contains 'jdbc:oracle:thin:@localhost:1521:ord'. The 'Use System User' checkbox is unchecked. Below it, the 'Username' is 'oe' and the 'Password' is masked. At the bottom, there is a 'Test Connection' button.

10. Click **Test Connection**. If the connection is established properly, the confirmation message appears.

11. Click **Apply** when the connection is properly established. The data source appears in thea Sources table.

The screenshot shows the Oracle BI Publisher Administration interface. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (set to weblogic), and Help. Below the navigation is a breadcrumb trail: Administration > JDBC. The main content area is titled "Data Sources" and features a tab bar with JDBC selected, along with JNDI, File, LDAP, OLAP, Web Services, and HTTP. A button labeled "Add Data Source" is visible. The data table lists three data sources:

Data Source Name	Connection String	Delete
demo	jdbc:oracle:thin:@localhost:1521:ord	[Delete icon]
oe	jdbc:oracle:thin:@localhost:1521:ord	[Delete icon]
Oracle BI EE	jdbc:oracleibi://EDVMR1PO:9514/	[Delete icon]

Practice 4-3: Exploring the Catalog and Viewing a Predefined Report

Overview

In the next few steps, you browse the Catalog and open a predefined report.

Tasks

1. Click the **Catalog** link on the global header. The Catalog page appears with the folders displayed in a tree structure on the left pane and object details on the right.

The screenshot shows the BI Publisher Catalog interface. On the left, there is a tree view of 'Folders' under 'Shared Folders'. The 'Sample Lite' folder is expanded, showing 'Subject Area Contents' and 'KPIs'. Under 'Published Reporting', there is a 'Reports' section with 'Expand', 'Upload', 'Delete', and 'Download' buttons. The main pane displays a list of catalog objects:

- 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 8/2/18 9:45 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
- Salary Report - No Parameters** - Last Modified 4/28/16 6:52 AM Created By weblogic
Salary report with no parameters. Sources data from XML file.
Open Schedule Jobs Job History Edit More
- Salary Report** - Last Modified 8/3/18 11:35 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 displayed as menu with search. Bursting
Open Schedule Jobs Job History Edit More
- Sales Performance Report** - Last Modified 4/28/16 6:52 AM Created By weblogic
Data Source - Sales Performance Data Model; Features - Cascading parameters displayed on vertical region using radio button controls; Drill-down charts
Open Schedule Jobs Job History Edit More

Catalog objects, such as reports and data models, are organized into folders. Shared Folders contain objects that can be used by others in reports, dashboards, and so on. My Folders contains private objects. Note that Sample Lite is contained within Shared Folders. Sample Lite is installed out of the box.

2. Navigate to Shared Folders > Sample Lite > Published Reporting > Reports. Click the **Open** link below “Salary Report – Checkboxes” (as shown in the preceding screenshot).

3. Salary Report - Checkboxes runs and appears in a browser window.

Salary Report - Checkboxes

Department

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

Employee

All

Apply

The report data is displayed with parameters. The reports display parameters when it has parameters defined in the data model or report editor.

Note: You can select different values for the Department drop-down list, such as Sales or Purchasing; and similarly select employees for these departments to view the data. The data in the report changes according to your selections. Because these parameters are connected (cascading parameters), when you select a specific department, the employees belonging to that department appear. Note that you can select a specific employee as well.

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

Vision Systems Confidential

Salary Report

Name	Job Title	Manager	Department	Salary
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
TOTAL				24,900.00

All the predefined layouts for the report appear as different tabs.

Note: The Sample Lite folder contains a set of predefined sample reports and other Catalog objects. You can open and view any of these reports.

- View the report by using any of the supported formats.

Click the **View** icon in the Report Viewer and select any of the formats, such as HTML, PDF, RTF, Excel, or PowerPoint.

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Salary Report

Name	Job Title	Manager	Department	Salary
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
TOTAL				24,900.00

Click the other tabs to view the different styles of layouts associated with this data. For example, click Batch Manager Salary to view a financial style.

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Salary Expense Report

Manager Den Raphaely

Name	Job Title	Manager	Department Name	Salary
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
TOTAL				13,900.00

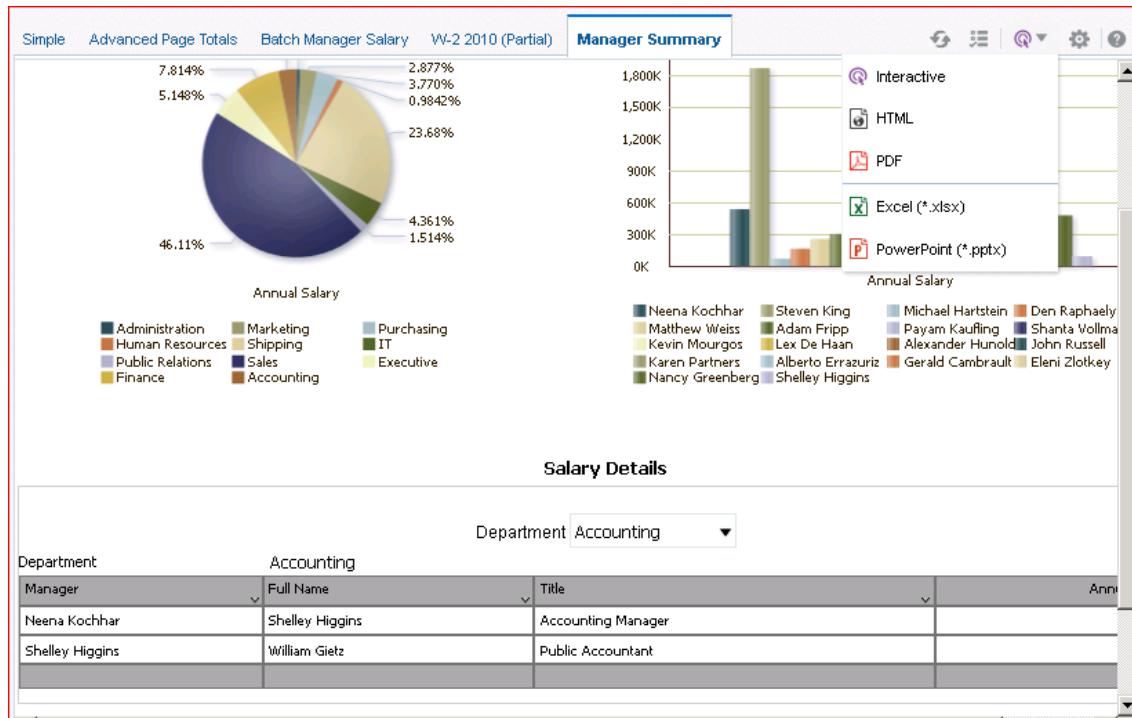
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Salary Expense Report

Manager Steven King

Name	Job Title	Manager	Department Name	Salary
Den Raphaely	Purchasing Manager	Steven King	Purchasing	11,000.00
TOTAL				11,000.00

Observe that, based on the layout you have chosen, report view options change. This layout has only HTML, PDF, and PowerPoint views. Click Manager Summary to see an interactive view.



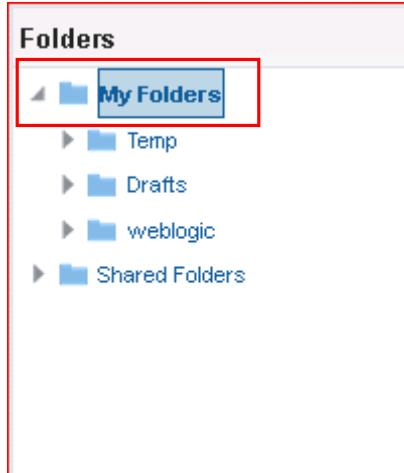
Practice 4-4: Creating a Private Folder

Overview

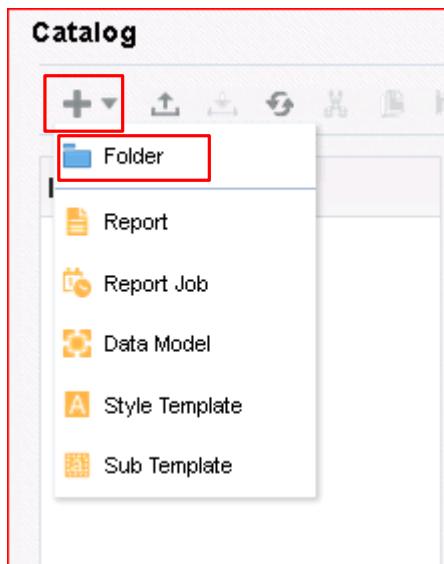
In this practice, you create a private folder in the Catalog. You will use this folder to save your objects.

Tasks

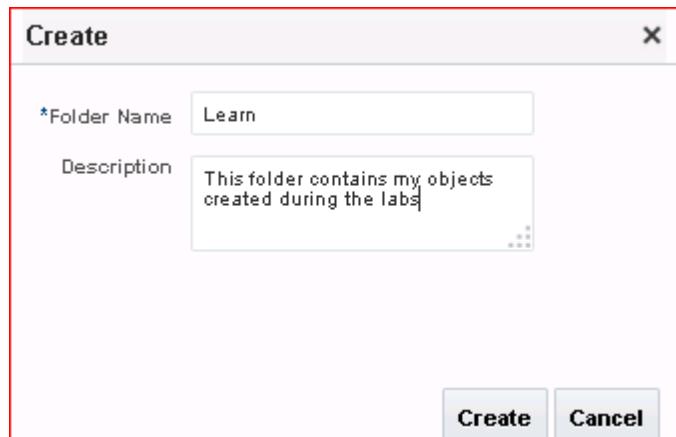
1. Click the **Catalog** link and select **My Folders**.



2. Click **New > Folder** to create a new folder under My Folders.



3. The Create dialog box appears. Enter **Learn** in the Folder Name text box and, optionally, enter a Description. Click **Create**.



4. Your new folder appears in the Catalog folder tree and in the work area. All objects that you create during your practice sessions (data models, reports, and so on) should be saved to this folder except for the objects that you will add to your dashboard and the files that are stored locally.

The screenshot shows the Catalog interface. On the left, there's a sidebar with a 'Folders' section containing 'My Folders' (which is selected and highlighted with a red box), 'Temp', 'Drafts', 'Learn', 'weblogic', and 'Shared Folders'. The 'Learn' folder is expanded, showing its details: Last Modified 8/6/18 9:44 PM, Created By weblogic, and the description 'This folder contains my objects created during the labs'. On the right, there's a main pane showing a list of objects: 'Temp', 'Drafts', 'Learn', and 'weblogic'. The 'Learn' object is also expanded, showing its details.

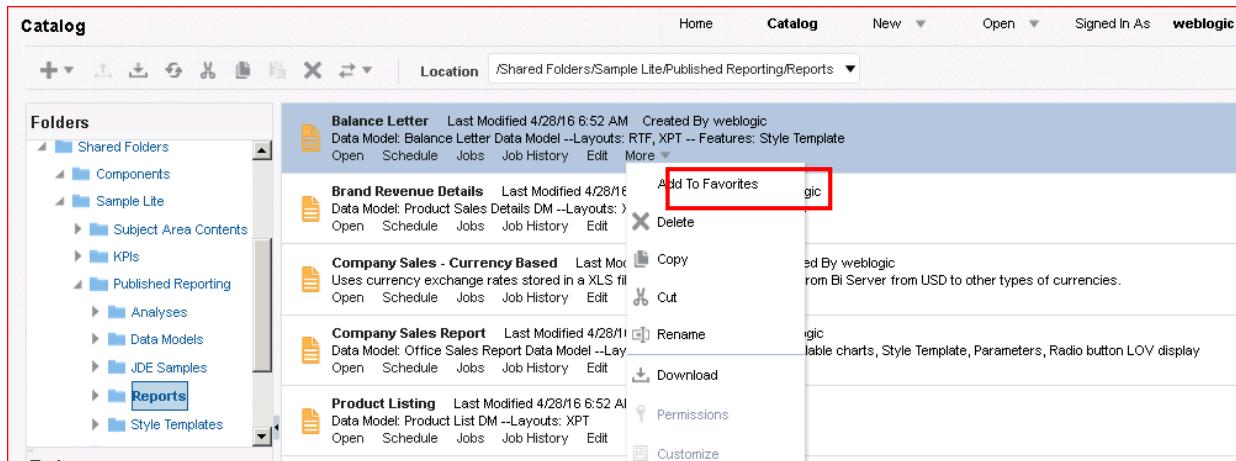
Practice 4-5: Managing Favorites

Overview

In this practice, you will add an existing report to the Favorites region and view it on the Home page.

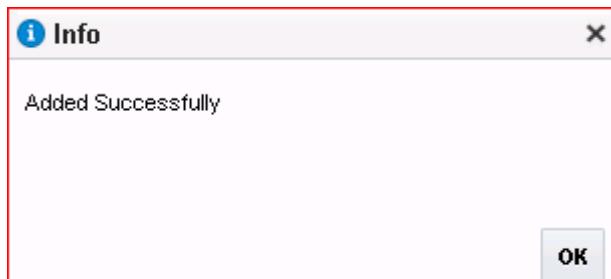
Tasks

1. Locate the **Balance Letter** report in the Catalog and click the **More** link.



2. Click **Add To Favorites** in the **More** Menu.

An information window is displayed. Click OK. The report is now added to the **Favorites** section.



3. Navigate to the Home page to view the report under the **Favorites** section.



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

- You can also add a report to the Favorites section from Report Viewer. Use the Actions menu, and then click **Add to My Favorite**.
- You can also use the **Manage** link in the Favorites section of the Home page for adding and managing favorites.

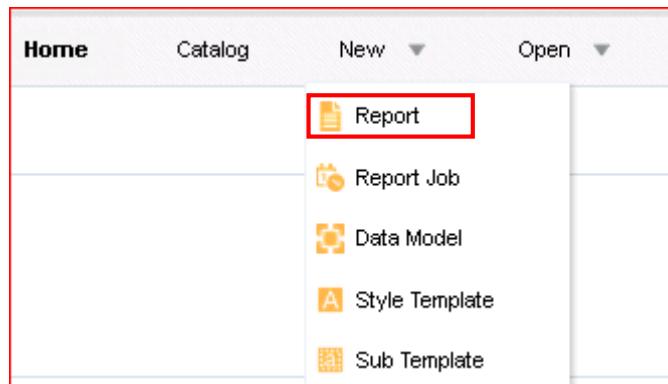
Practice 4-6: Creating a Simple Report Based on a Predefined Data Model

Overview

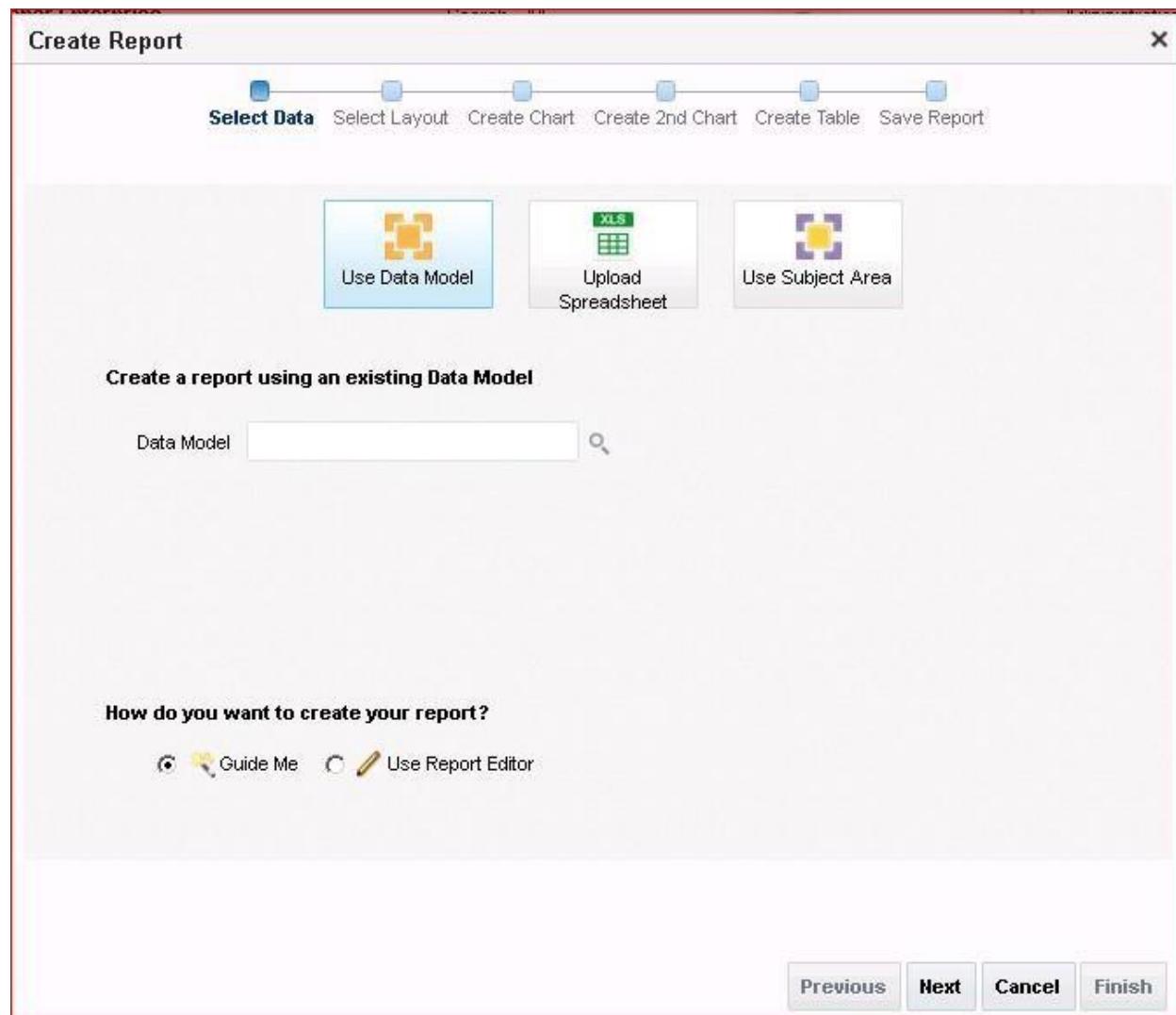
In this practice, you create a simple report against an existing (predefined) data model, Salary Report Parameter, and view it in Report Viewer. This report will have a simple chart and table. You use the Report Wizard to create the new report.

Tasks

1. Click New > Report in the global header.



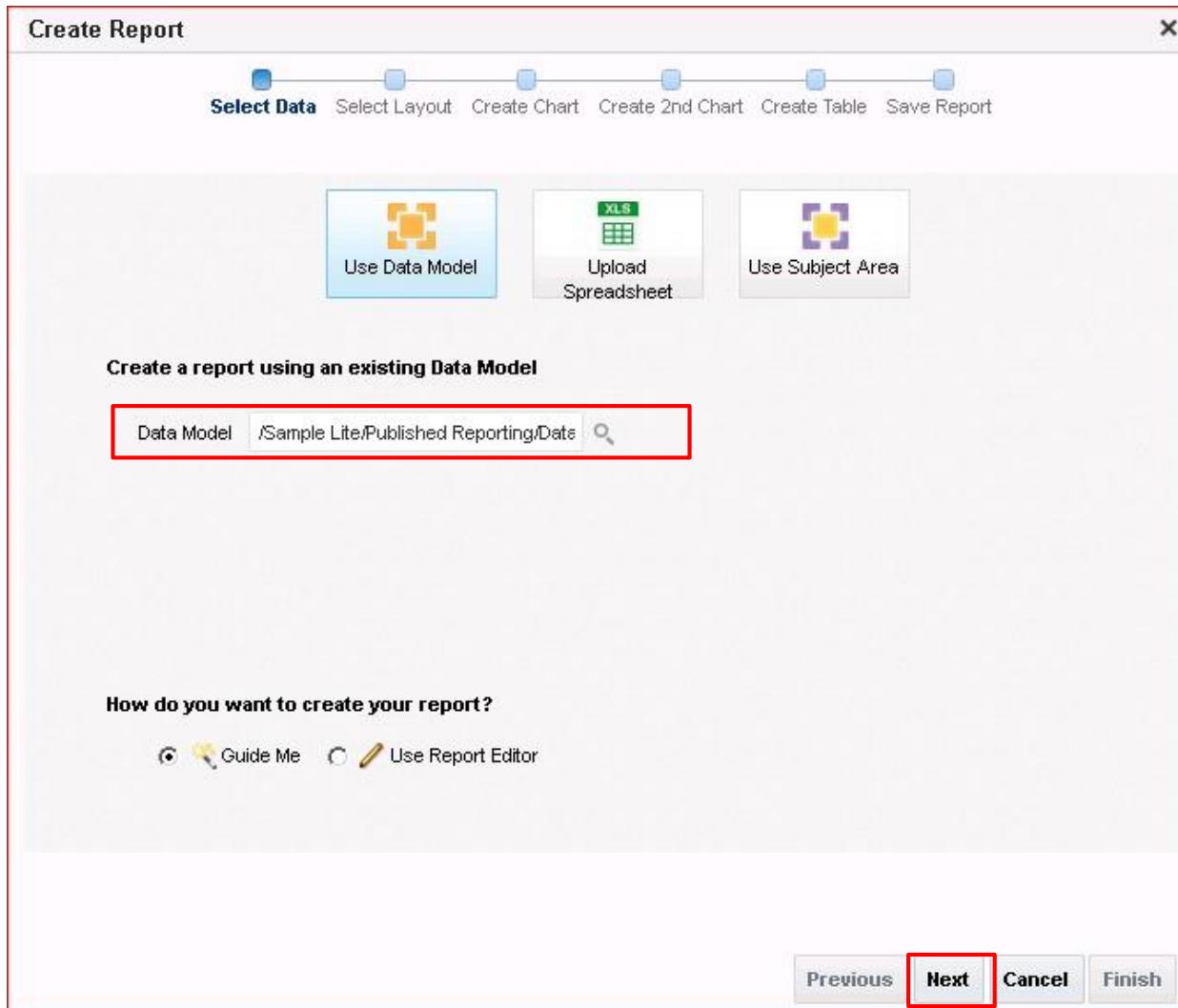
2. The Create Report window is opened. You can select the data using any of the available choices: Use Data Model, Upload Excel Spreadsheet, or Use Subject Area. You create a report by using the existing data model—*Salary Parameter Datamodel*.



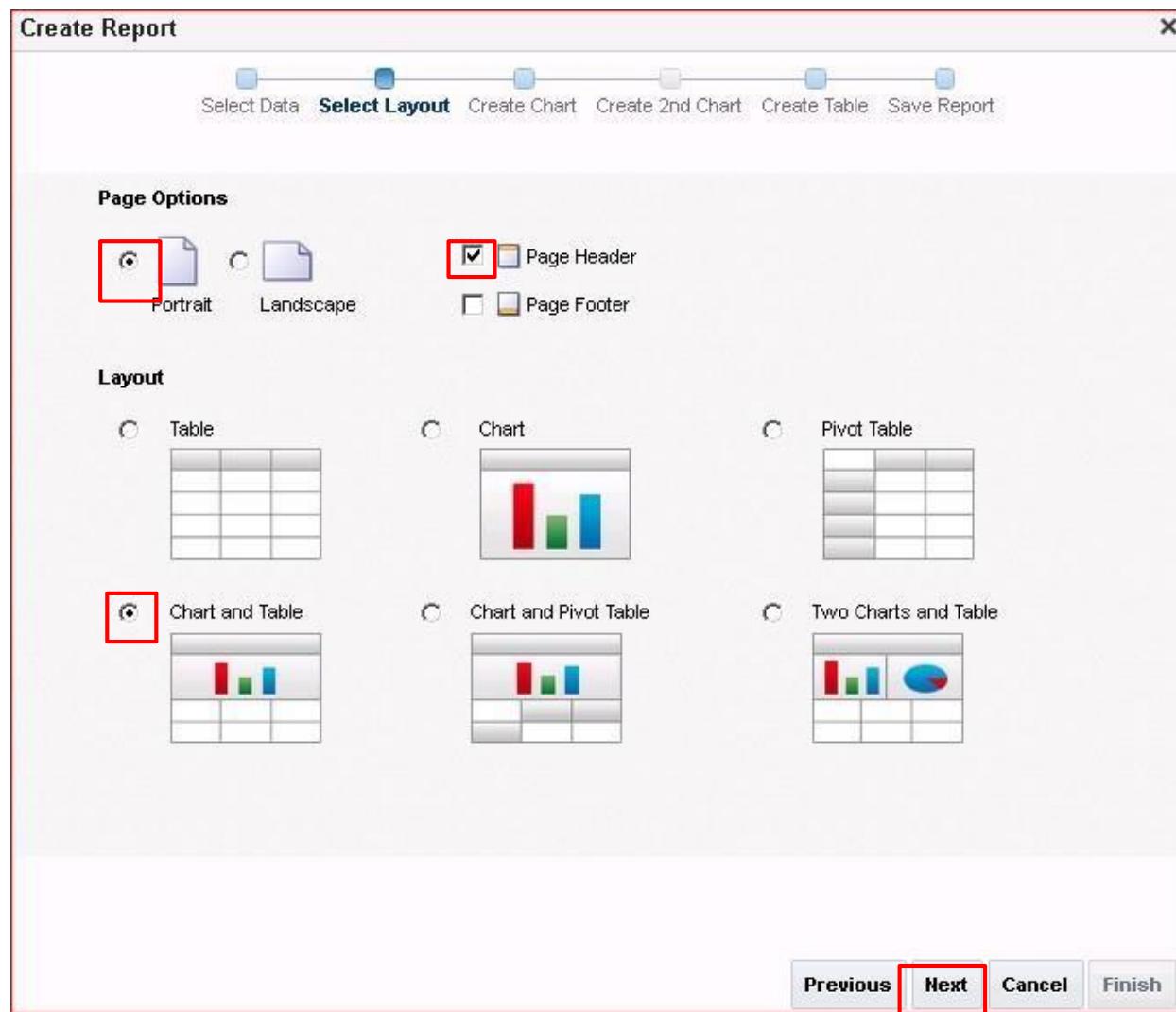
Click the Search icon beside the Data Model selection field to select an existing data model from the Catalog.

3. Select the data model from the Catalog folder: Shared Folders > Sample Lite > Published Reporting > Data Models > Salary Parameter Datamodel and click **Open**.

T4. his is reflected in the Report Wizard's Data Model field. Click **Next**.



5. After you select the data source for the report, select the report page options and report layout to define how data is displayed in the report. In Page Options, select **Portrait** for the page orientation.

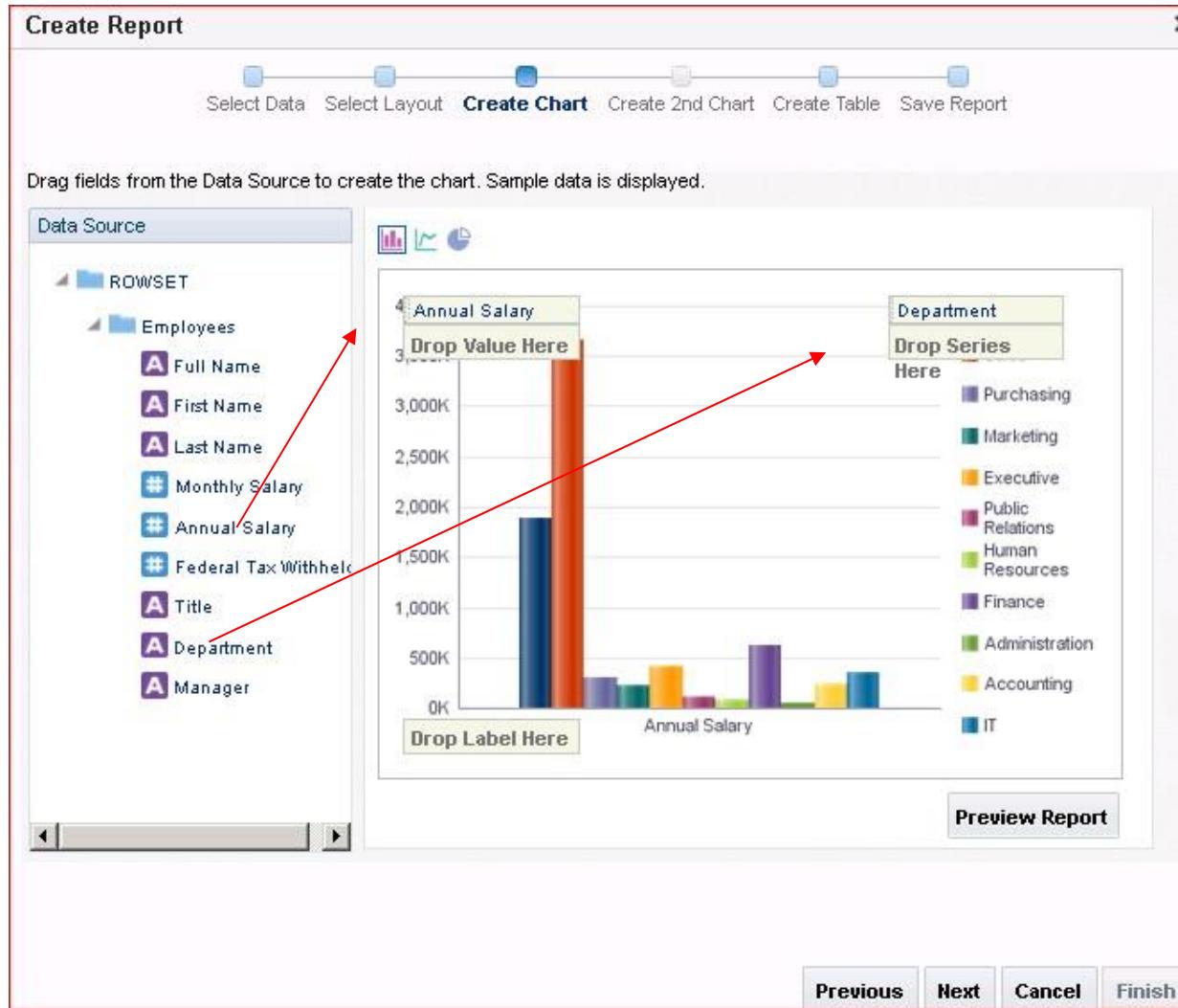


6. Select **Page Header** to display the page header.
7. From Layouts, select **Chart and Table**. You can choose any of the combinations based on your requirement.
8. Click **Next**. The layout that you select on the Select Layout page drives the remaining pages that you must complete in order to create the report.
9. Because you have selected the Chart and Table layout, the Create Chart page opens. The Chart Layout page supports three types of charts. Select **Bar Chart**.

Add columns to the chart by dragging and dropping them from the Data Source pane to the chart area.

36

- a. Drag Annual Salary on to Drop Value Here.
- b. Drag Department on to Drop Series Here.



11. Click **Next** in the Report Wizard to create a table.

12. The Create Table page is displayed with the columns that you previously selected for the chart. You will edit this table by adding and removing required columns.

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	Annual Salary
Shipping	96000
Shipping	98400
Shipping	94800
Shipping	78000
Shipping	69600
Sales	132000
Sales	126000
Sales	168000
Sales	162000
Sales	144000
	7924800

Show Grand Totals Row

Preview Report

The screenshot shows the 'Create Report' interface with a red border around the main content area. At the top, there's a navigation bar with six buttons: 'Select Data', 'Select Layout', 'Create Chart', 'Create 2nd Chart', 'Create Table' (which is highlighted in blue), and 'Save Report'. Below the navigation is a message: 'Drag fields from the Data Source to create the table. Sample data is displayed.' To the left is a 'Data Source' tree view with 'ROWSET' expanded, showing 'Employees' with various fields like 'Full Name', 'First Name', 'Last Name', etc. To the right is a table with sample data. At the bottom left is a checkbox for 'Show Grand Totals Row', and at the bottom right is a 'Preview Report' button.

13. Remove the column **Annual Salary** from this table by selecting the column and clicking the remove option as shown.

The screenshot shows the 'Create Report' interface in BI Publisher. At the top, there is a navigation bar with steps: Select Data, Select Layout, Create Chart, Create 2nd Chart, Create Table, Create Table (highlighted in blue), and Save Report. Below the navigation bar, a message says 'Drag fields from the Data Source to create the table. Sample data is displayed.' On the left, a 'Data Source' panel lists fields under 'ROWSSET' and 'Employees'. Under 'Employees', fields include Full Name, First Name, Last Name, Monthly Salary, Annual Salary (which is highlighted with a red box), Federal Tax Withheld, Title, Department, and Manager. To the right of the data source is a table preview with two columns: 'Department' and 'Annual Salary'. The table contains 14 rows of sample data. The 'Annual Salary' column header has a red 'X' icon in its top-right corner, indicating it can be removed.

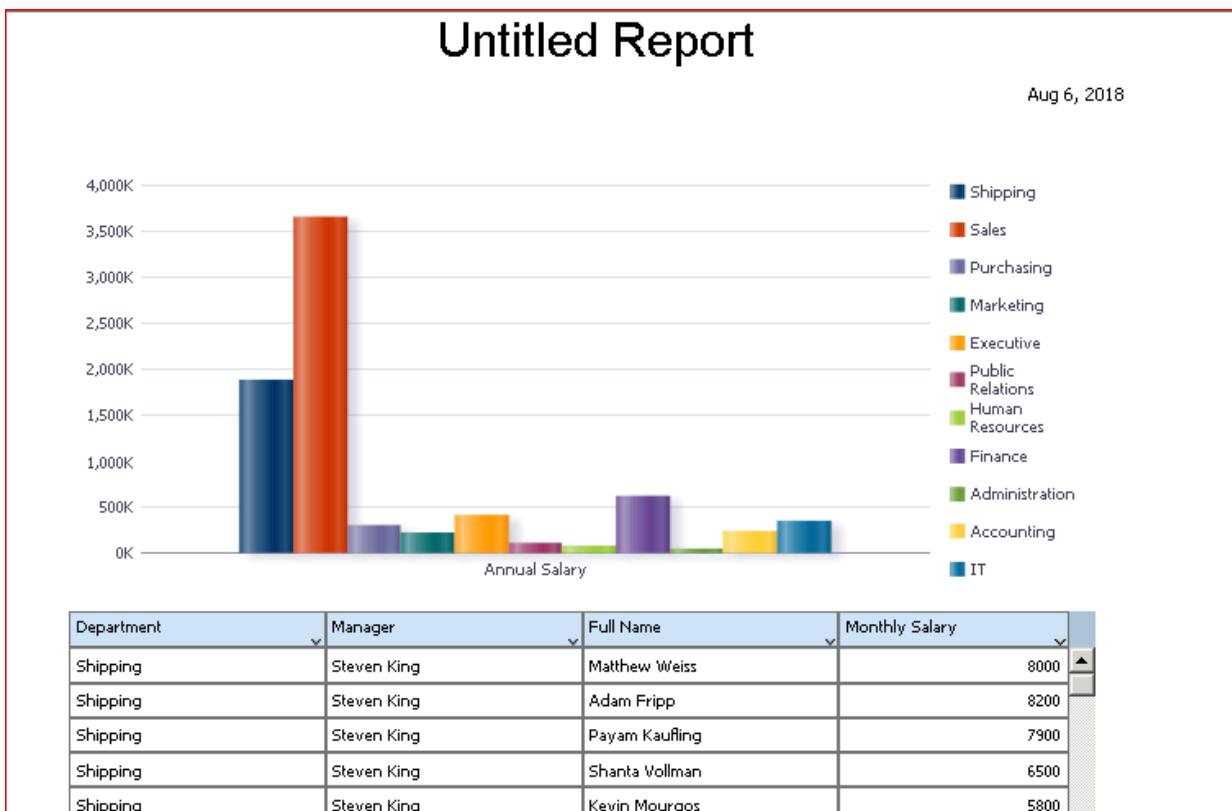
Department	Annual Salary
Shipping	96000
Shipping	90400
Shipping	94800
Shipping	78000
Shipping	69600
Sales	132000
Sales	126000
Sales	160000
Sales	162000
Sales	144000
	7924800

14. Add data to the table. Along with the existing Department column, add Manager, Full Name, and Monthly Salary by dragging the data elements to the table. The columns are displayed in a simple tabular format and the column widths are automatically adjusted based on the number of selected columns.

The screenshot shows the 'Create Report' dialog with the 'Create Table' step selected. On the left, the 'Data Source' tree view shows a 'ROWSET' node expanded to reveal an 'Employees' node. Under 'Employees', several fields are listed: 'Full Name', 'First Name', 'Last Name', 'Monthly Salary' (which is highlighted with a red box and has a red arrow pointing to the table), 'Annual Salary', 'Federal Tax Withheld', 'Title', 'Department' (which is also highlighted with a red box), and 'Manager'. To the right of the tree is a table preview showing data for the 'Department' and 'Manager' columns. At the bottom of the dialog, there are buttons for 'Previous', 'Next', 'Cancel', and 'Finish', with 'Preview Report' highlighted with a red box.

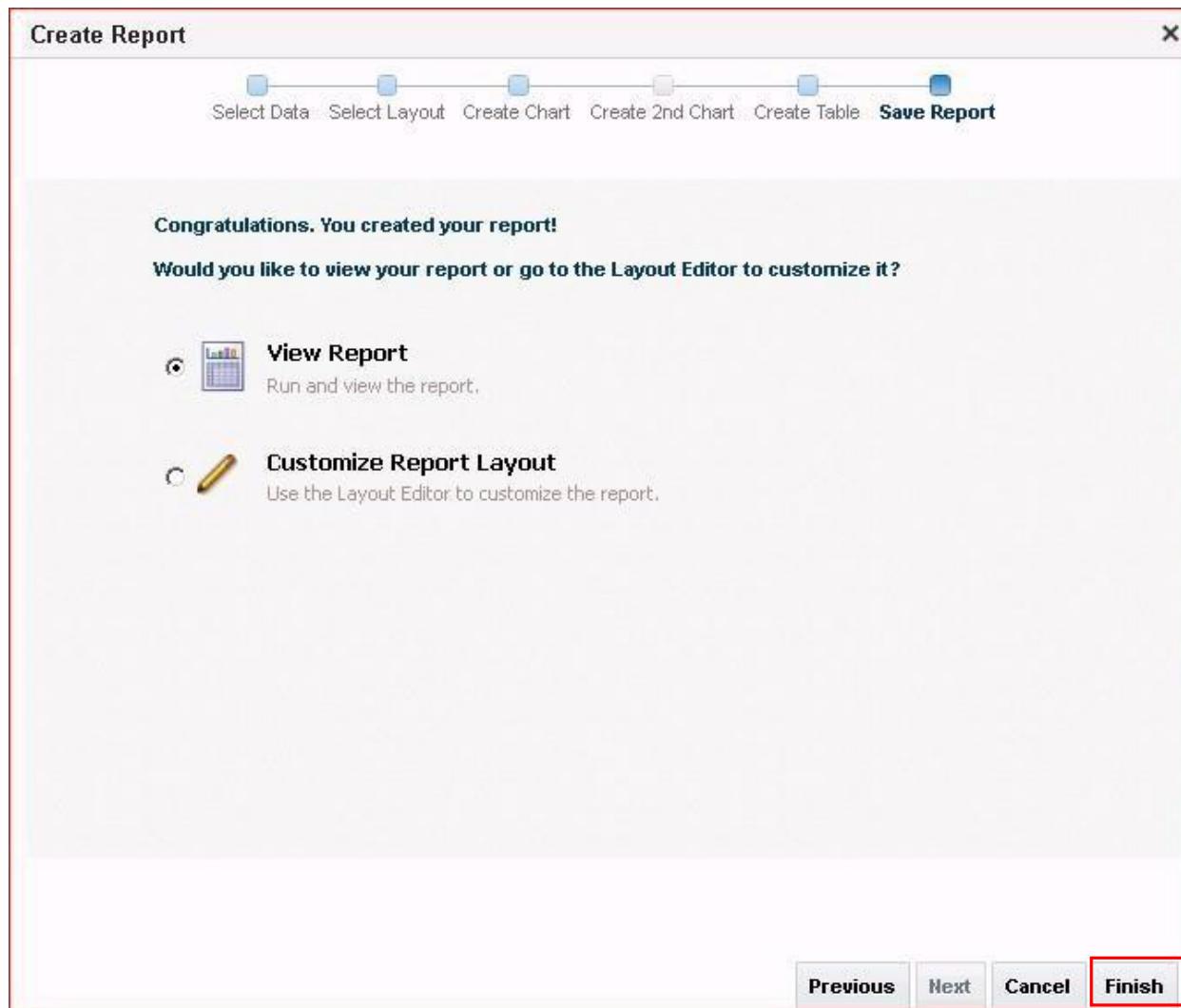
Department	Manager	Full Name	Monthly Salary
Shipping	Steven King	Matthew Weiss	8000
Shipping	Steven King	Adam Fripp	8200
Shipping	Steven King	Payam Kaufling	7900
Shipping	Steven King	Shanta Vollman	6500
Shipping	Steven King	Kevin Mourgos	5800
Sales	Steven King	Gerald Cambrault	11000
Sales	Steven King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

15. Click **Preview Report** to view the report in the interactive viewer.



16. Close the viewer's browser window.
17. Click **Next** in the Report Wizard to proceed to saving the report.

18. To run the report you just created, click **View Report** and then click **Finish**. The final page prompts you to save the report.

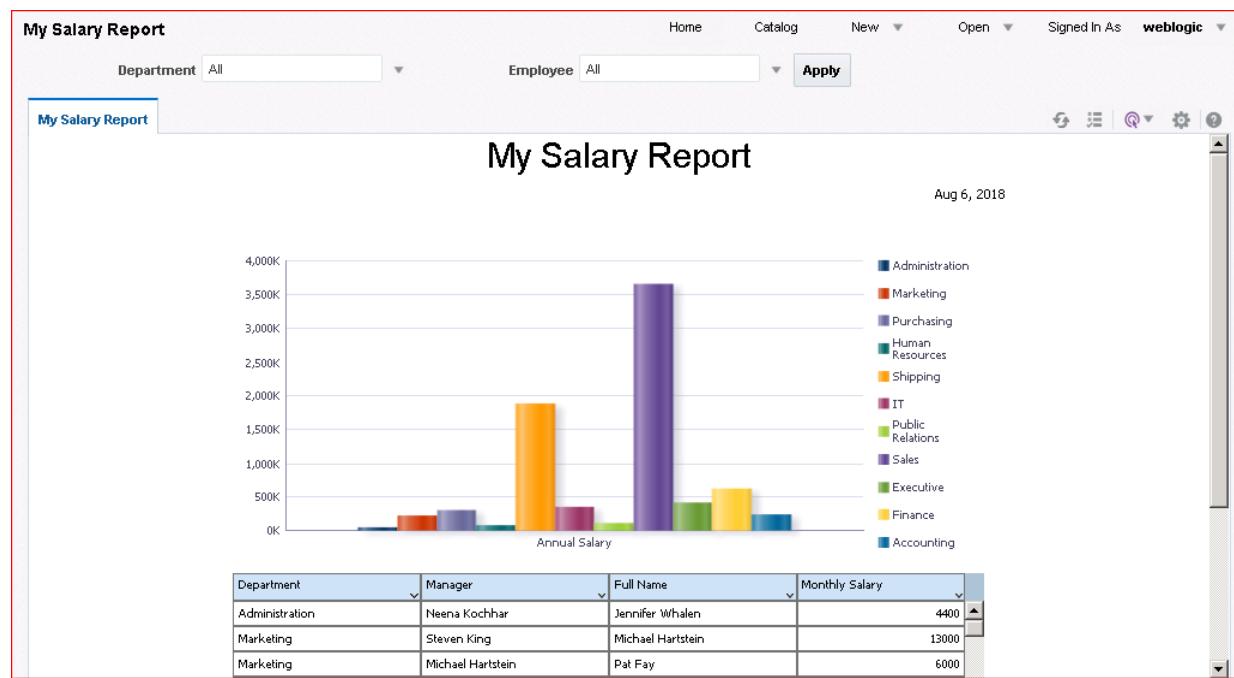


Note: If you select the Customize Report Layout option, the final page prompts you to save the report. After saving, the report is opened in the Layout Editor for further editing.

19. In the Save As dialog box, select the folder **My Folders > Learn**.

20. Name the report **My Salary Report**. Click **Save**.

21. The report is displayed in the report viewer. By default, the report header takes its name from the report file name you have given. You can edit this using the Layout Editor.



Practice 4-7: Creating a Simple Report Based on a Spreadsheet

Assumptions

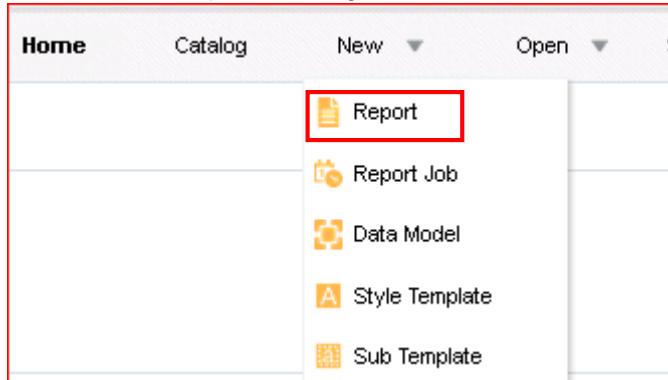
You create a simple report using an Excel spreadsheet and display the report in Report Viewer.

Practice Overview

In this practice, you will upload an Excel spreadsheet and create a report using the spreadsheet.

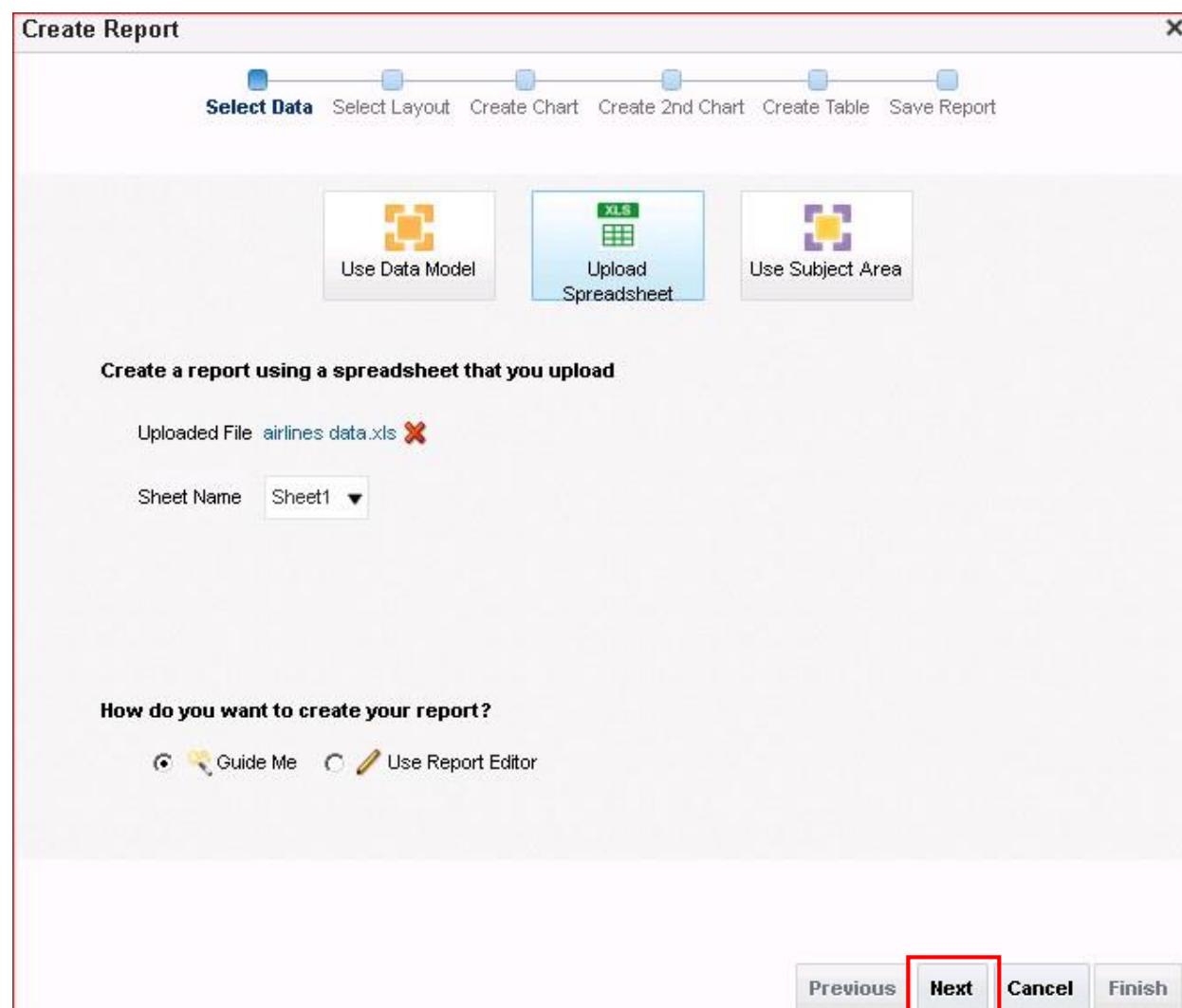
Tasks

1. Click New > Report in the global header.



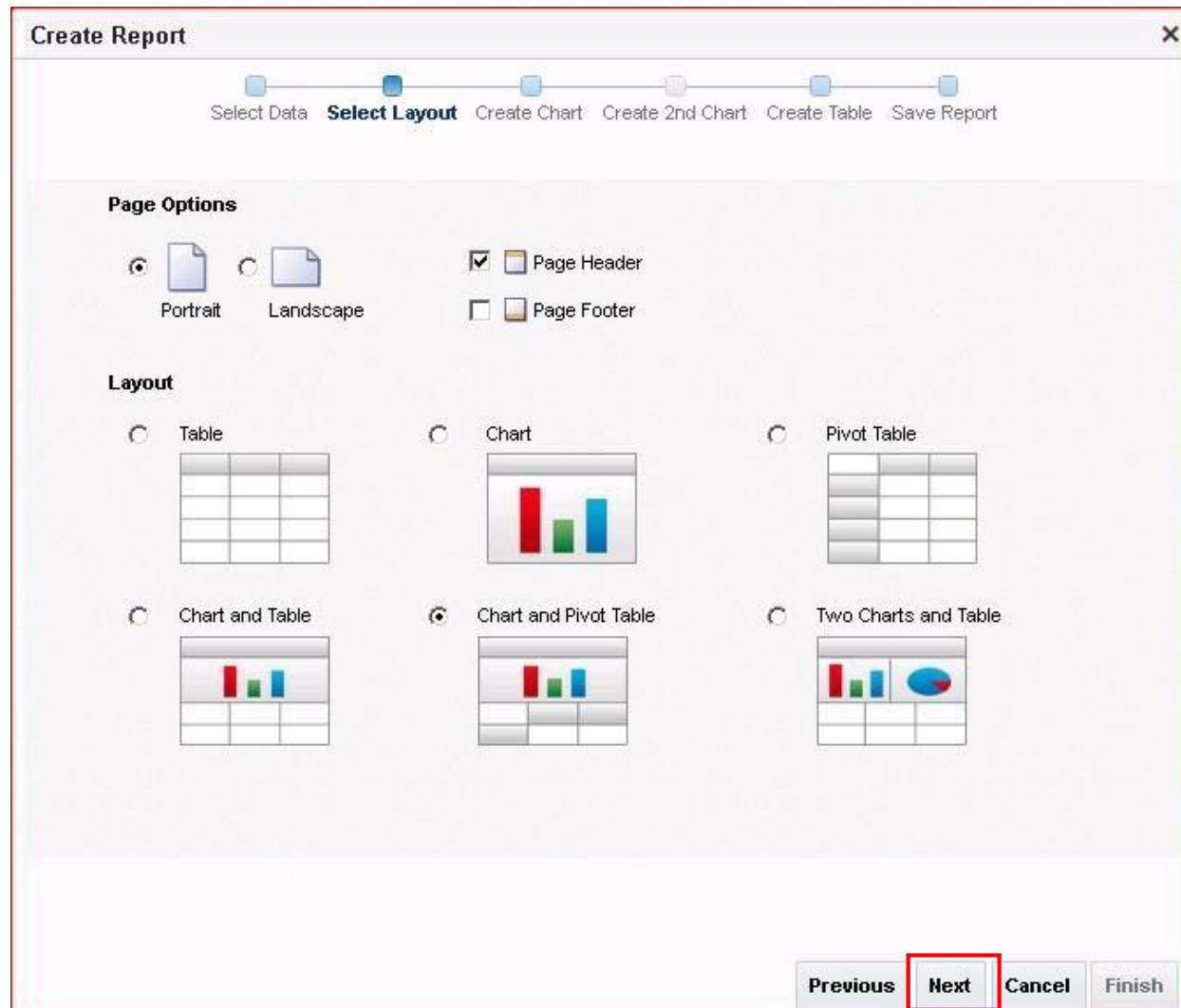
2. The Create Report window is opened. You will create a report by using **sheet1** of the `airlines data.xls` spreadsheet.

3. Click Upload Spreadsheet and then Browse. Upload **sheet1** of the D:/MyFiles>airlines data.xls file.



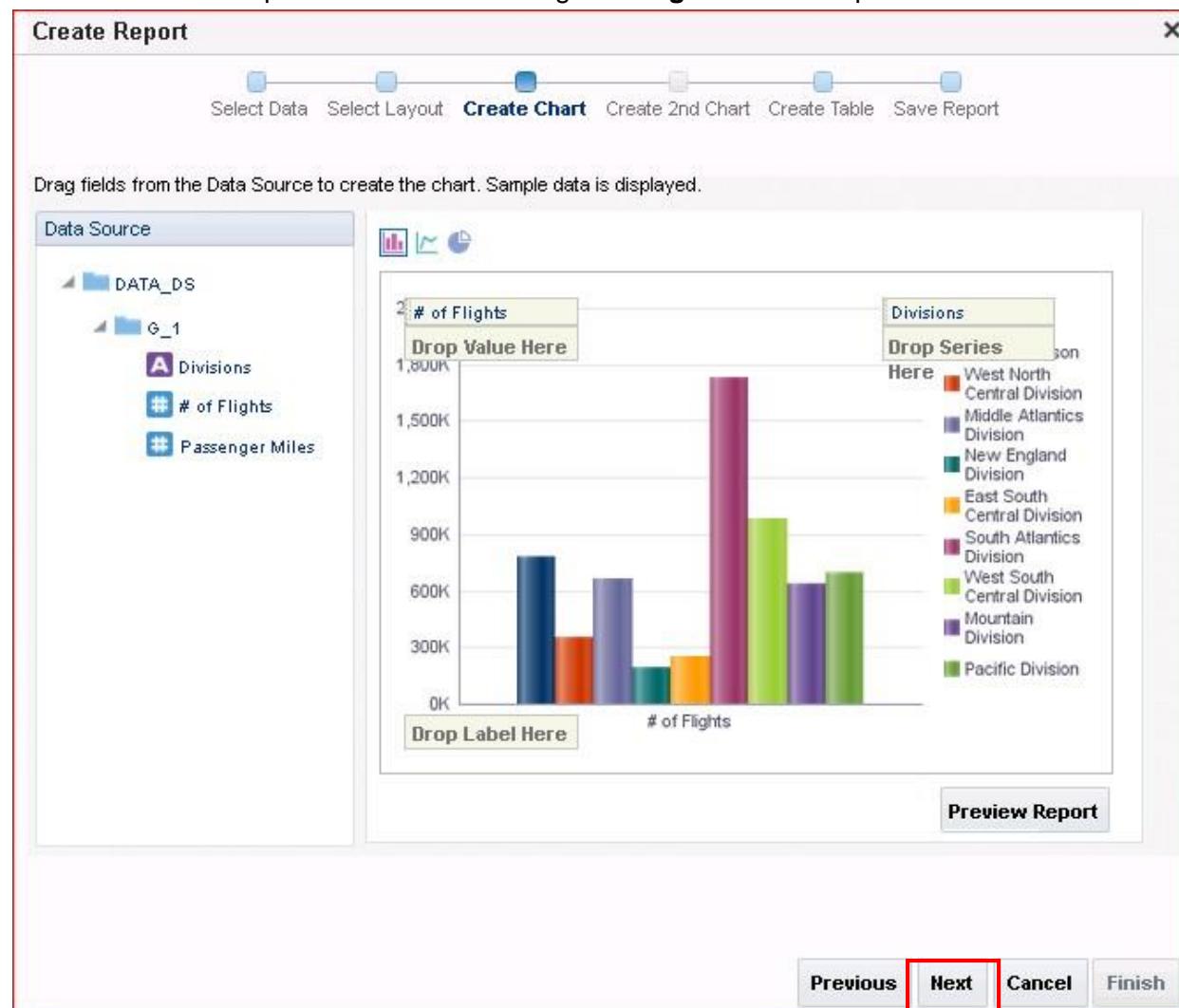
4. Click Guide Me to use the guided wizard and click **Next**.

5. After you select the data source for the report, select the report page options and report layout to define how data is displayed in the report. In Page Options, select **Portrait** for page orientation. Select **Page Header** to display the page header. From Layouts, select **Chart and Pivot Table**.



6. Click **Next**. The layout that you select in the Layout section drives the remaining pages that you must complete in order to create the report.

7. Create a chart from the selected data set. Select Bar Chart as the chart type. Drag **Divisions** to the Drop Series Here area. Drag **# of Flights** to the Drop Value Here area.



8. Click Next.

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

- DATA_DS
 - G_1
 - Divisions
 - # of Flights
 - Passenger Miles

Drop Rows Here

East South Central Division	West North Central Division	Middle Atlantics Division	New England Division	East South Central Division
# of Flights	# of Flights	# of Flights	# of Flights	# of Flight
775037	349753	665486	196266	24849

Show Row Grand Totals Show Column Grand Totals **Preview**

9. The Create Table step is displayed per your layout selection. Drag **Divisions** to the Drop Rows Here area. Drag **Passenger Miles** next to **# of Flights**.

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

- DATA_DS
 - G_1
 - A Divisions**
 - # # of Flights**
 - # Passenger Miles**

Drop Columns Here

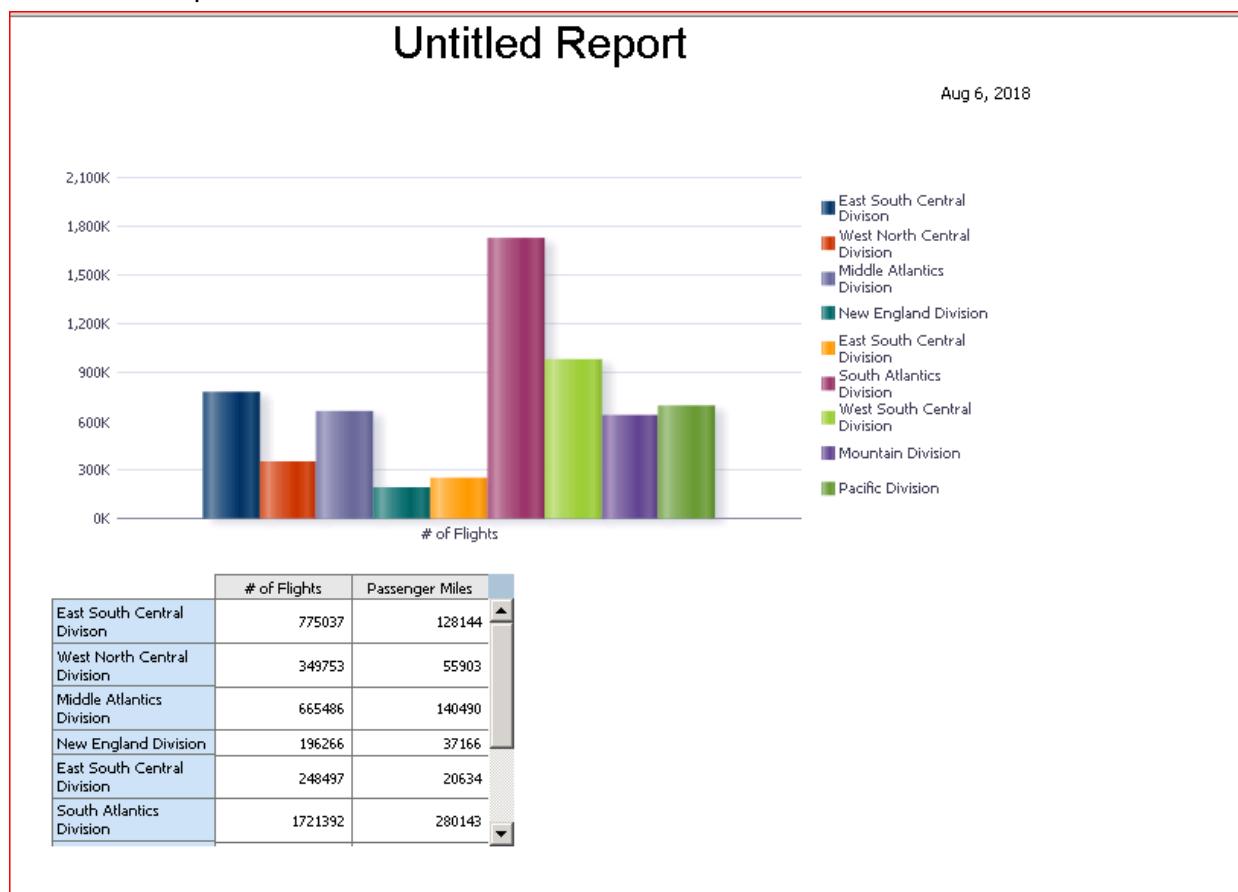
Divisions	# of Flights	Passenger Miles
East South Central Division	775037	128144
West North Central Division	349753	55903
Middle Atlantics Division	665486	140490
New England Division	196266	37166
East South Central Division	248497	20634

Show Row Grand Totals Show Column Grand Totals **Preview**

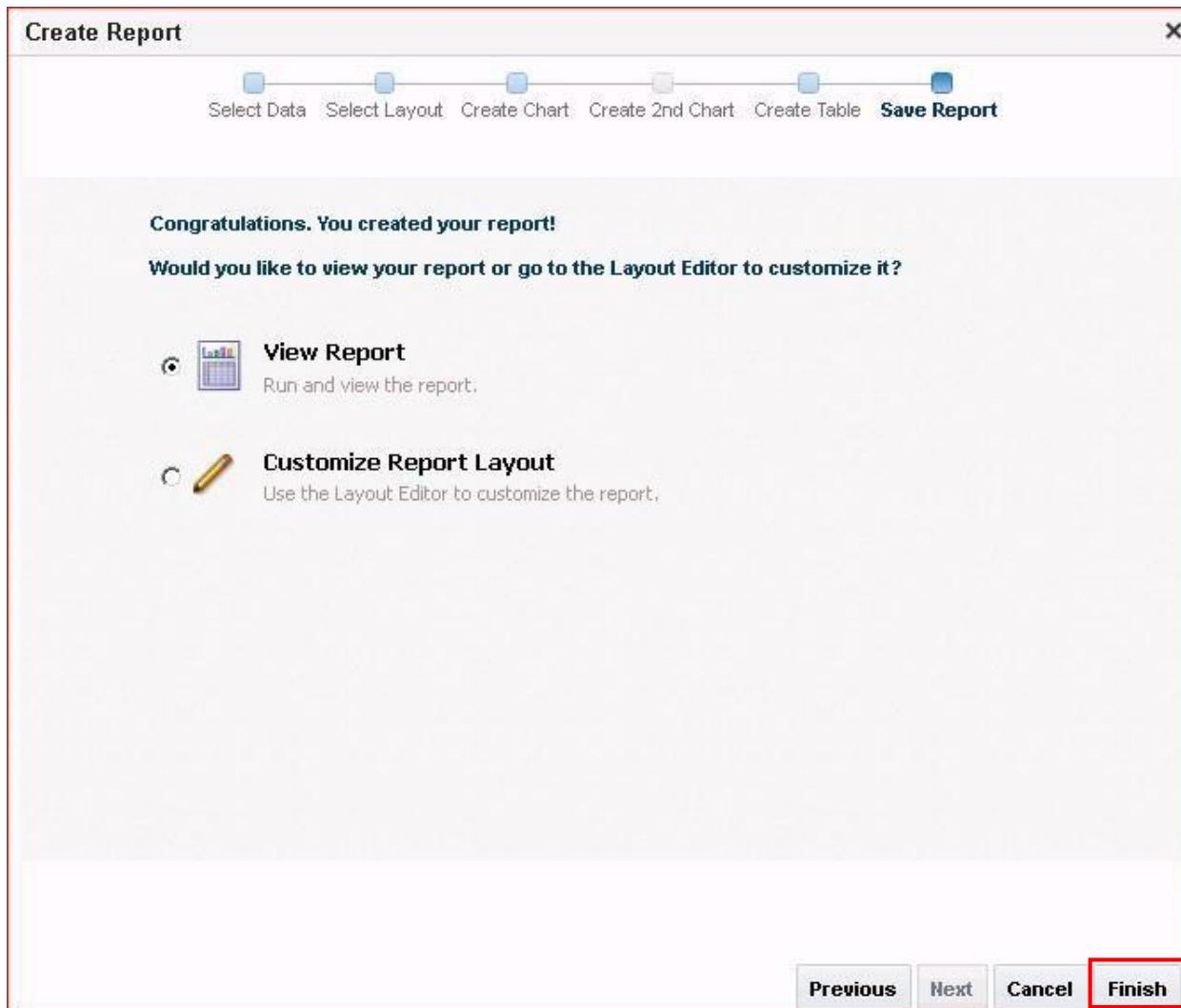
Previous **Next** Cancel Finish

The screenshot shows the 'Create Report' dialog with a red border. At the top, there are seven steps: 'Select Data', 'Select Layout', 'Create Chart', 'Create 2nd Chart', 'Create Table' (which is highlighted in blue), and 'Save Report'. Below these is a message: 'Drag fields from the Data Source to create the pivot table. Sample data is displayed.' On the left, under 'Data Source', there's a tree view: 'DATA_DS' has a child 'G_1' which contains 'Divisions', '# # of Flights', and '# Passenger Miles'. In the center, there's a 'Drop Columns Here' area with a grid. The first row of the grid has three columns: 'Divisions' (highlighted with a red box), '# of Flights', and 'Passenger Miles'. Below this is a sample pivot table with five rows of data. At the bottom of the dialog, there are two checked checkboxes: 'Show Row Grand Totals' and 'Show Column Grand Totals'. To the right of these is a 'Preview' button. At the very bottom are four buttons: 'Previous', 'Next' (highlighted with a red box), 'Cancel', and 'Finish'.

10. Preview the report.



11. Close the preview and click **Next** in the Report Wizard to proceed to saving the report. To run the report you just created, click **View Report** and then click **Finish**. The final page prompts you to save the report.



12. Save the report as My Airlines Report in My Folders > Learn.
13. The report is now displayed in the Report Viewer window. Click any of the divisions in the chart and see how the pivot table shows data for that division only. Alternately, you can click any of the divisions in the pivot table and see how the chart shows data for that division only.

Practice 4-8: Creating a Simple Report Based on BIee Subject Area

Assumptions

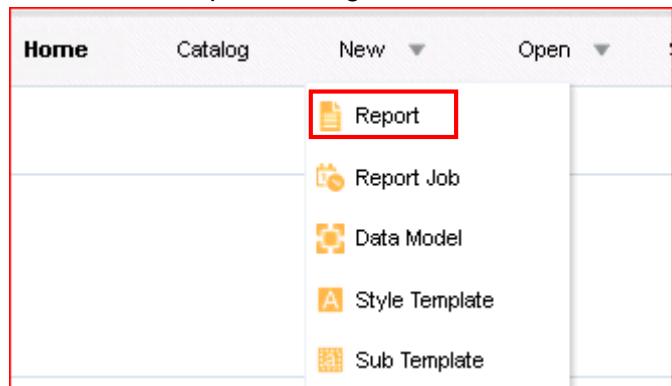
You create a simple report against the OBIEE subject area and view the report.

Practice Overview

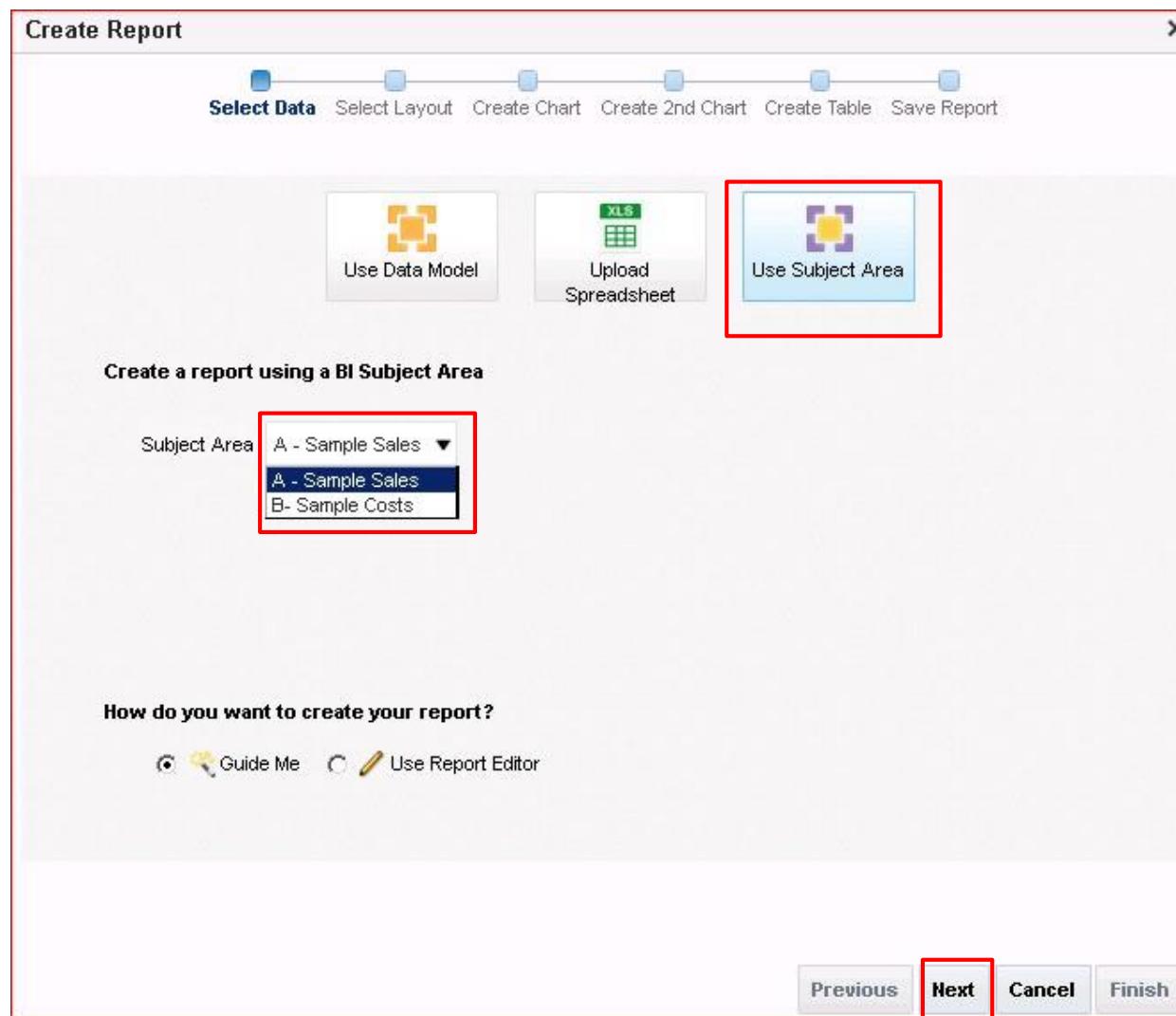
In this practice, you create a report using the OBIEE subject area for the report data.

Tasks

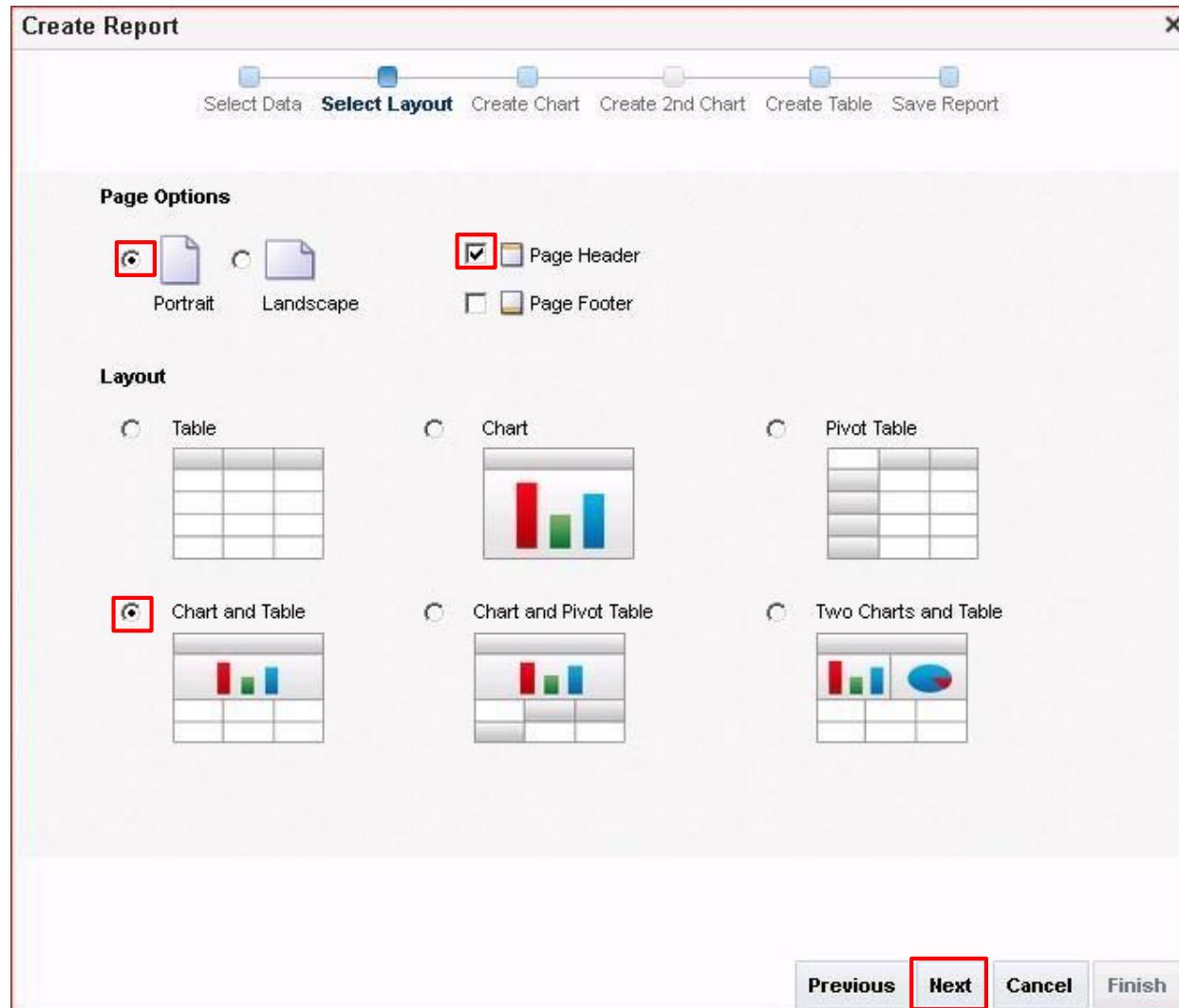
1. Click New > Report in the global header.



2. The Create Report window is opened. You will create a report by using the subject area. Select **Sample Sales Lite** from the Subject Area list. Click Guide Me and click **Next**.

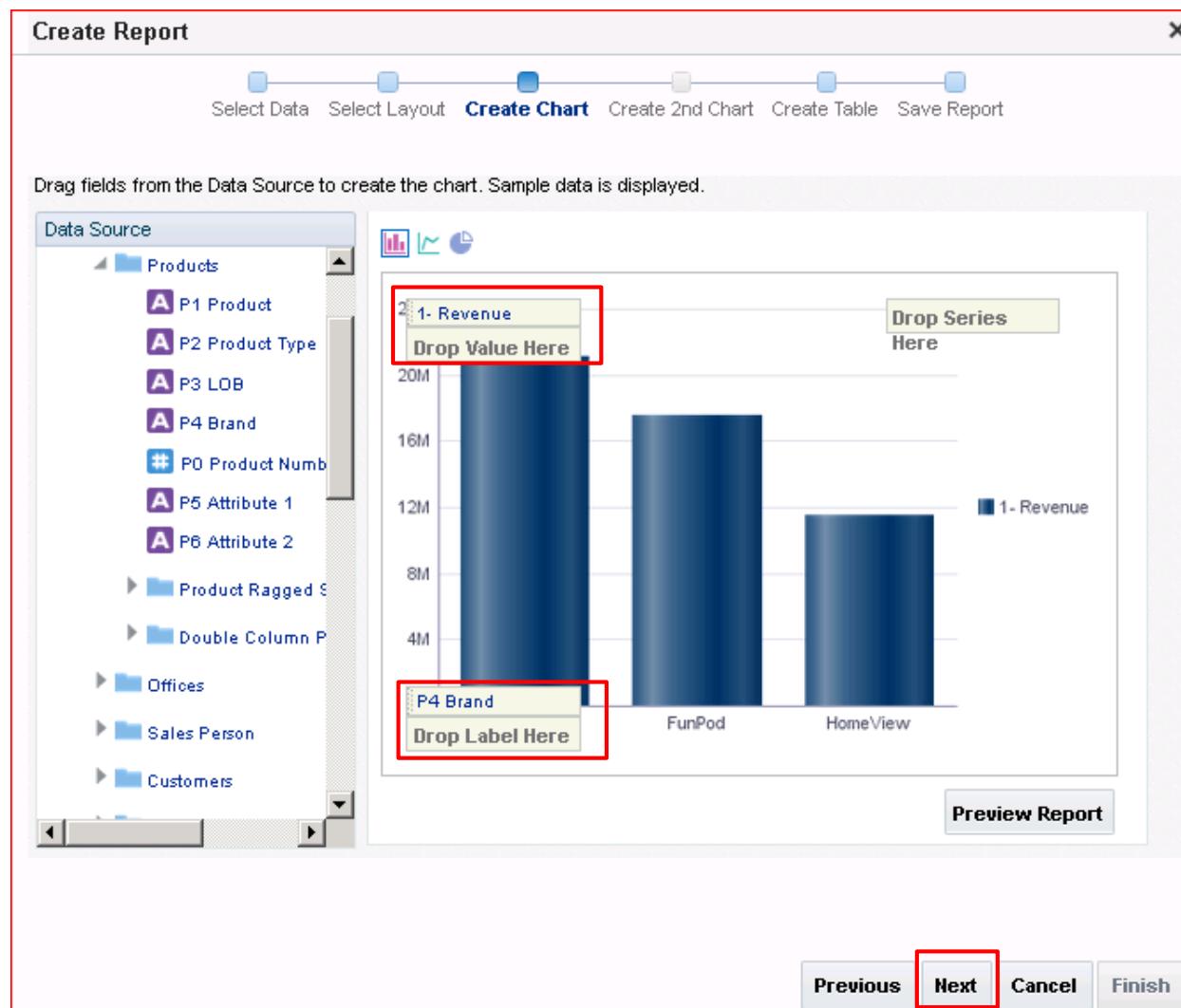


3. In Page Options, select **Portrait** for the page orientation. Select **Page Header** to display the page header. From the Layout section, select **Chart and Table**. You can choose any of the combinations based on your requirement.



4. Click **Next**. The layout that you select in the Layout section drives the remaining pages that you must complete in order to create the report.
5. Create a chart from the selected subject area data. Select Bar Chart as the chart type.

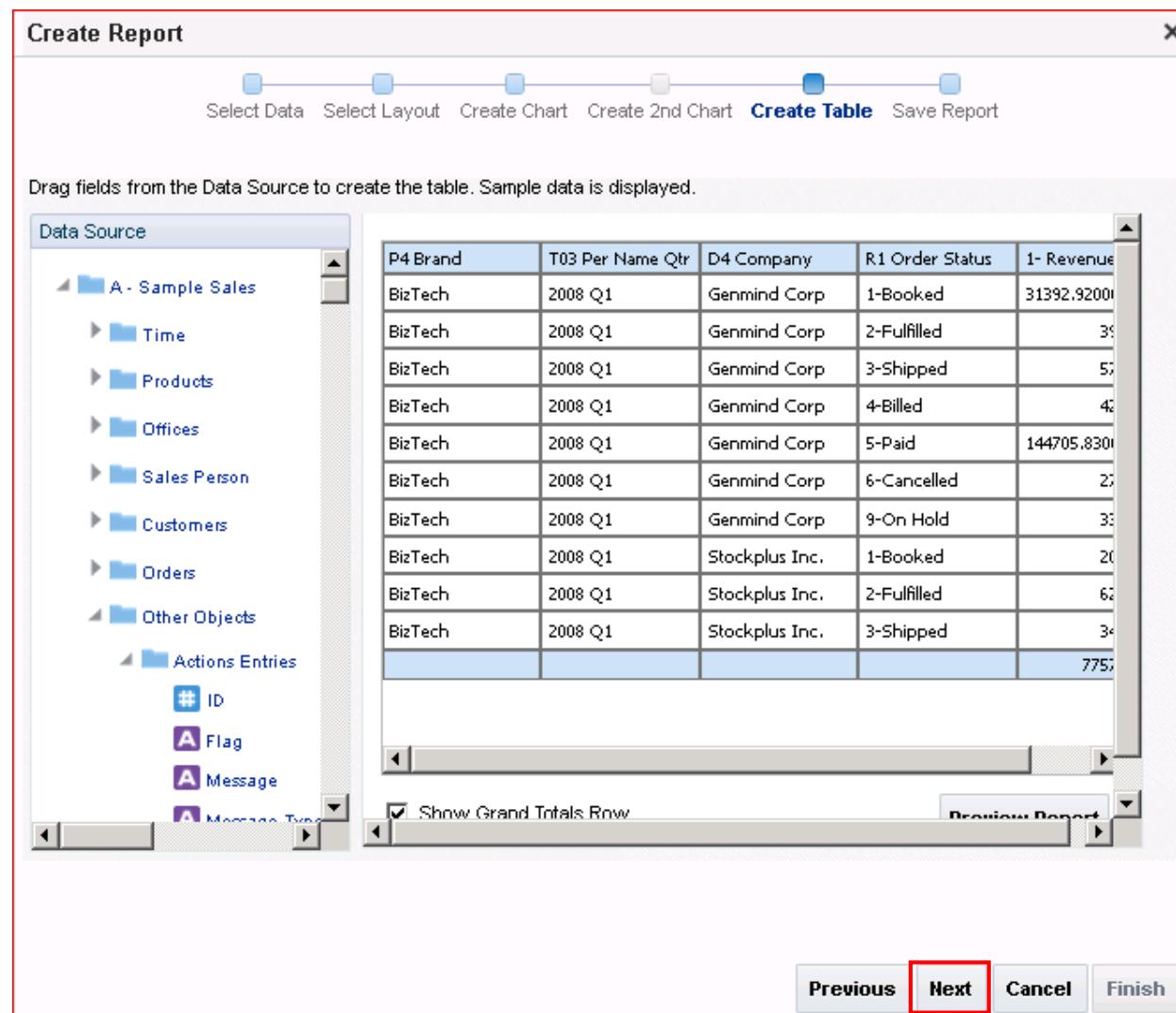
6. Drag the data elements Product: Brand and Base Facts: Revenue, as shown in the screenshot, to the Drop Label Here and Drop Value Here areas in the chart.



7. Click **Next**.
8. The Create Table step is displayed.

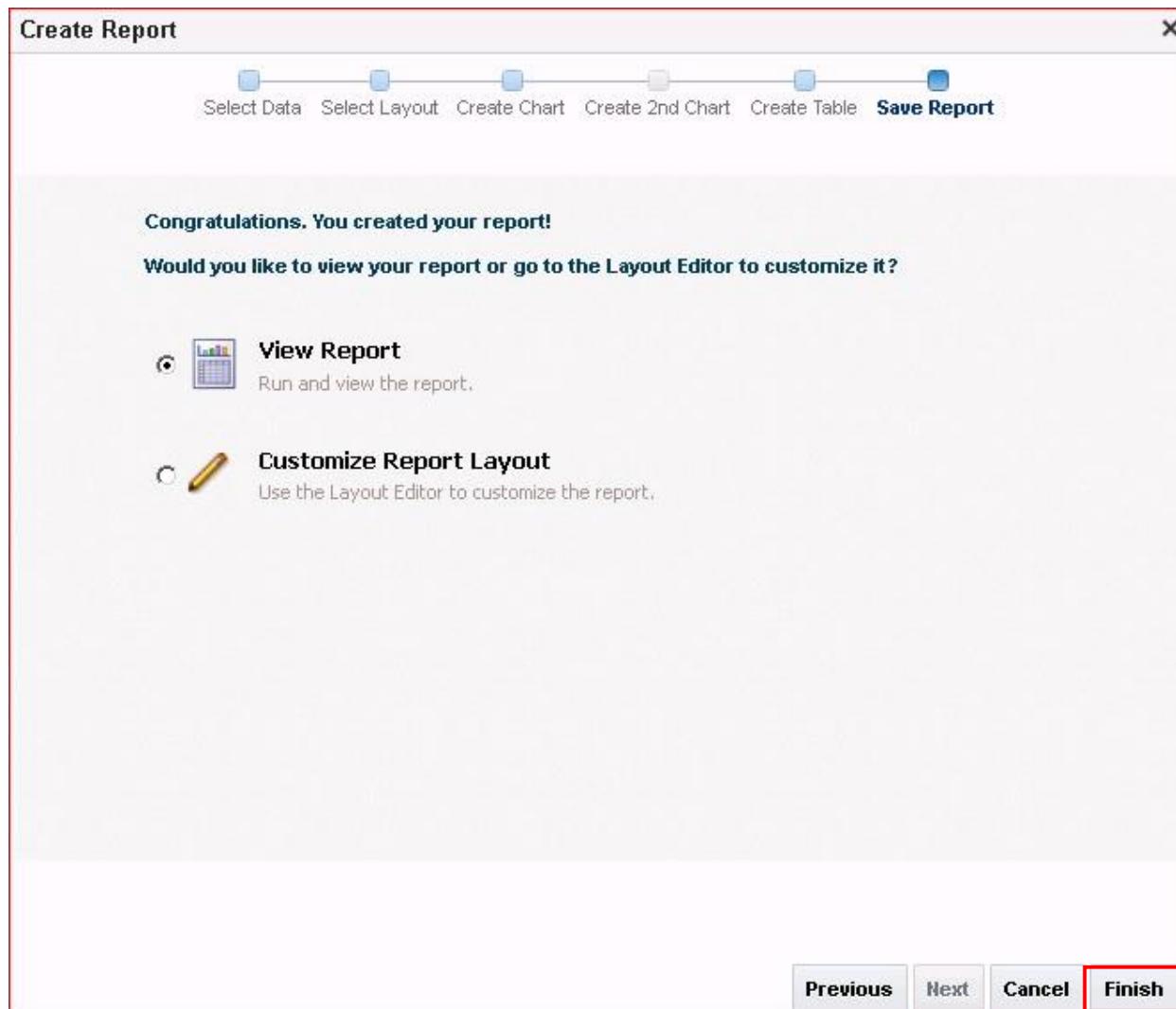
9. Add Brand and Revenue, if they are not already present. Add other required columns to the table. Drag data elements from the data source to the table columns, per the following table:

Data Element	Table Column
Time	Per Name Qtr
Offices	Company
Orders	Order Status



10. Click **Next** in the Report Wizard to proceed to saving the report.

11. To run the report you just created, click **View Report** and then click **Finish**. The final page prompts you to save the report.



12. Save the report as **My Revenue Report** in My Folders > Learn.

13. The report is now displayed in the Report Viewer window.



Practices for Lesson 5: Using Data Model Editor

Practices for Lesson 5: Overview

Goal

To explore the BI Publisher Data Model Editor and to create and edit a data model based on a SQL Query data set, and create a report for the same

Practices Overview

You define a private JDBC connection, and you create and save a data model and a report based on a SQL Query data set.

Time

45 - 50 minutes

Practice 5-1: Opening the Data Model Editor and Creating a Private Connection

Overview

In this practice, you create a private JDBC connection.

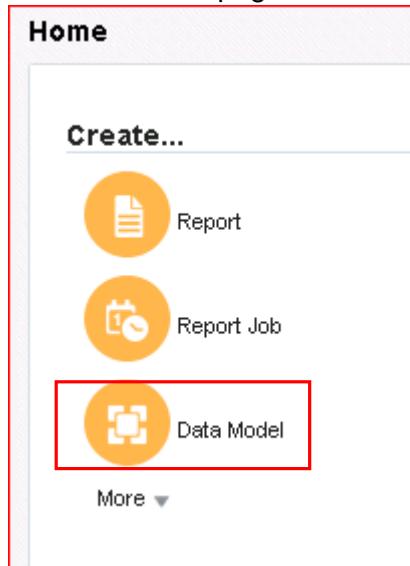
Assumptions

The BBERRY user is available.

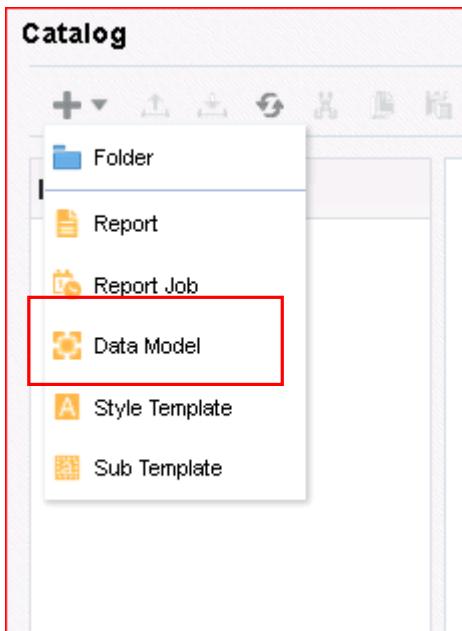
Note: Because you created the Learn folder using the weblogic credentials as the administrator role, you will not be able to view the folder under My Folders now. You will use the folder My Folders directly to save the objects created in this practice.

Tasks

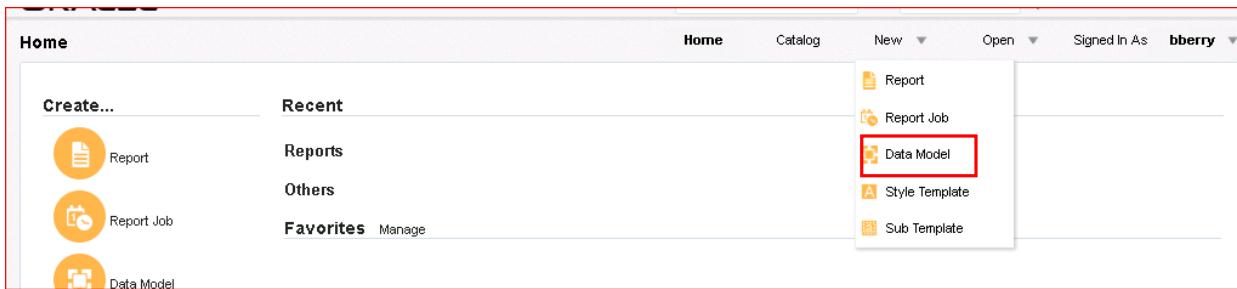
1. Log in to BI Publisher as username BBERRY and password BBERRY12 .
2. Choose one of the following ways to open the Data Model Editor:
 - From the Home page: Create section > Data Model



- From the Catalog page: New > Data Model



- From the global header: New > Data Model



3. The Data Model Editor appears. This page is composed of two panes: Properties on the right and Data Model on the left.

The screenshot shows the Oracle Data Model Editor interface. On the left, there's a sidebar titled 'Data Model' with a 'Properties' section containing links like 'Data Sets', 'Event Triggers', 'Flexfields', etc. The main area is titled 'Properties' and contains various configuration options: 'Description' (text input), 'Default Data Source' (dropdown), 'Oracle DB Default Package' (button), 'Database Fetch Size' (input), 'Query Time Out' (input), 'Scalable Mode' (dropdown set to 'Instance Level'), 'Enable SQL Pruning' (dropdown set to 'Instance Level'), 'Enable SQL session trace' (dropdown set to 'Instance Level'), 'SQL Trace Name' (input), 'Backup Data Source' (checkboxes for 'Enable Backup Connection', 'Switch to Backup Data Source when Primary Data Source is unavailable', and 'Use Backup Data Source only'), and 'XML Output Options' (checkboxes for 'Include Parameter Tags', 'Include Empty Tags for Null Elements', and 'Include Group List Tag').

Click Manage Private Data Sources.

Note: You need to have the Data Model Developer privilege or BI Author role to create this connection.

4. The Manage Private Data Sources window appears. Observe that you see only the JDBC and OLAP tabs. By default, the JDBC tab is displayed. Click **Add Data Source**.

Note: If you log in with administrative privileges, you can see other tabs.

The screenshot shows the 'Manage Private Data Sources' window. At the top, there's a header with tabs for 'JDBC', 'OLAP', 'Web Services', and 'HTTP'. Below the tabs, there's a section titled 'Add Data Source'. A table has two columns: 'Data Source Name' and 'Connection String'. There is one row in the table. To the right of the 'Connection String' column is a 'Delete' button. The 'JDBC' tab is highlighted with a blue background.

5. The Manage Private Data Sources dialog box appears.

Enter the private connection name, and the required fields. Provide the following details:

- a. Data Source Name: MyJDBC
- b. Driver Type: Oracle 12c
- c. Database Driver Class: oracle.jdbc.OracleDriver
- d. Connection String: jdbc:oracle:thin:@localhost:1521:fenago
- e. Username and Password: oe/oe

Manage Private Data Sources

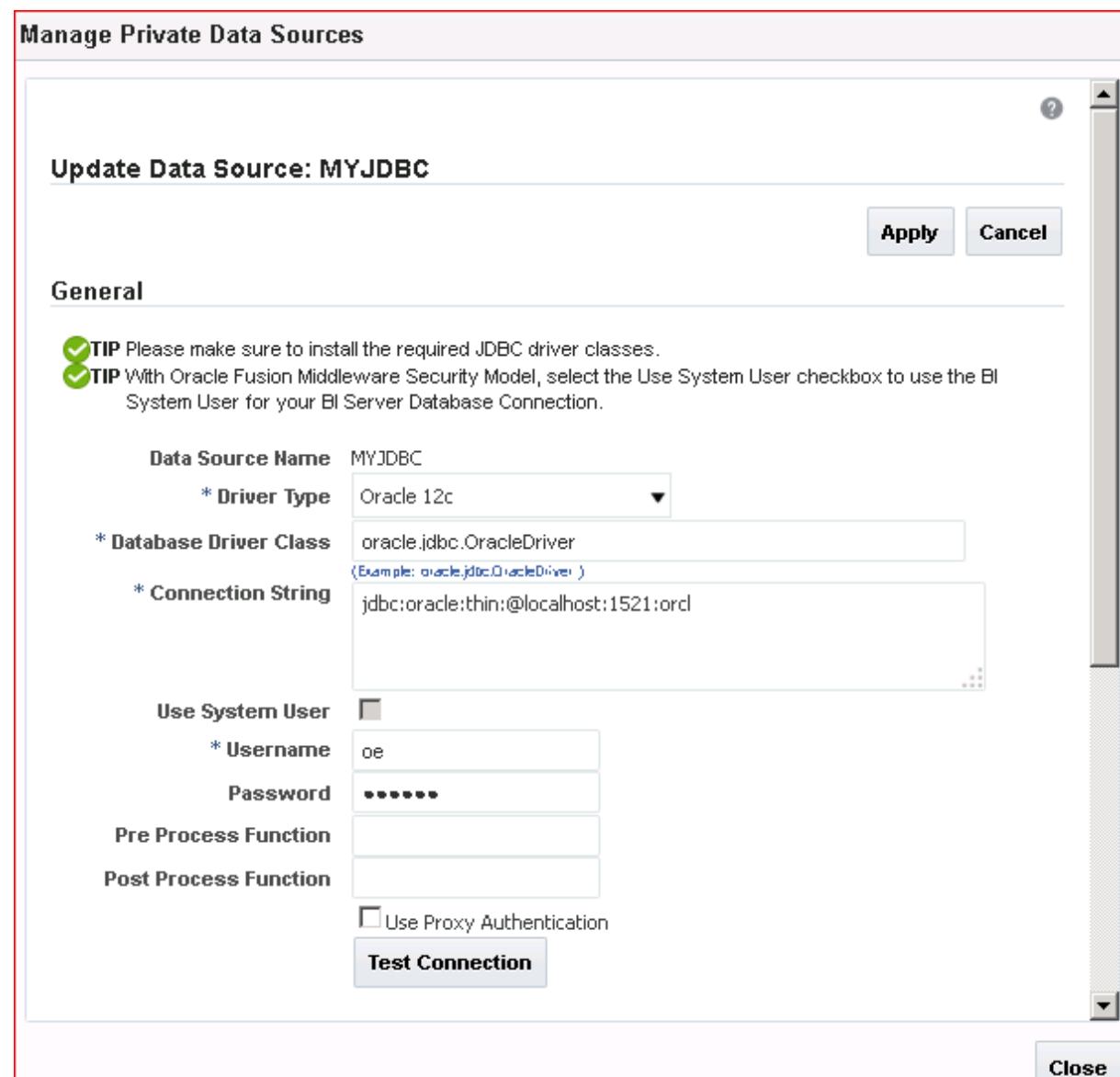
Update Data Source: MYJDBC

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:orcl
Use System User	<input type="checkbox"/>
* Username	oe
Password	*****
Pre Process Function	
Post Process Function	
<input type="checkbox"/> Use Proxy Authentication	
Test Connection	

Close



6. Click Test Connection. A confirmation prompt is displayed.

Manage Private Data Sources

Confirmation
Connection established successfully.

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:orcl`

Use System User:

* **Username**: oe

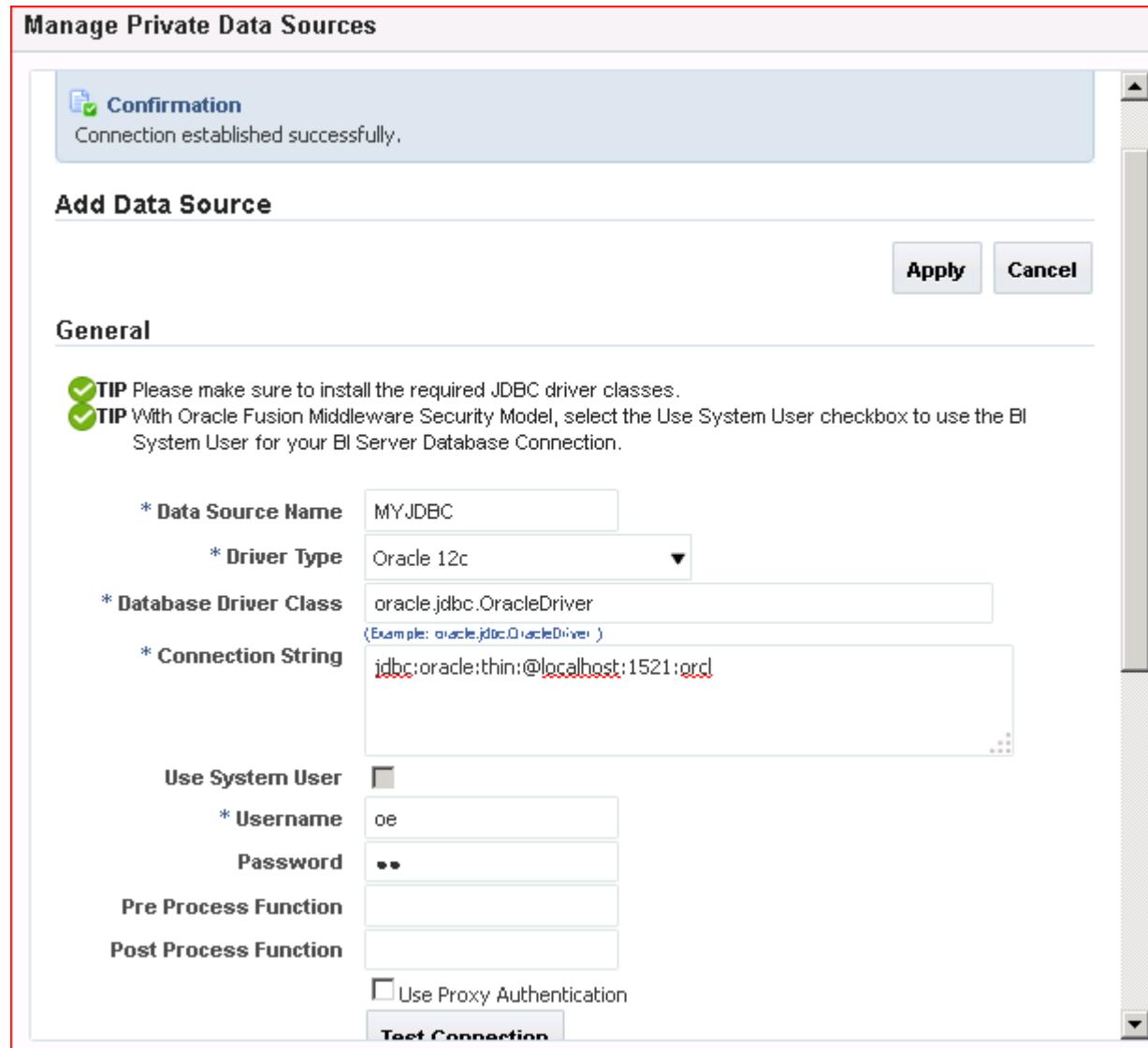
Password: **

Pre Process Function:

Post Process Function:

Use Proxy Authentication

Test Connection



The screenshot shows the 'Add Data Source' dialog box from the Oracle BI Data Model Editor. The 'General' tab is selected. At the top, there are two tips: one about installing JDBC drivers and another about using the BI System User. Below these are fields for 'Data Source Name' (MYJDBC), 'Driver Type' (Oracle 12c), 'Database Driver Class' (oracle.jdbc.OracleDriver), and 'Connection String' (jdbc:oracle:thin:@localhost:1521:orcl). Under 'Use System User', a checkbox is checked. Below it are fields for 'Username' (oe) and 'Password' (two asterisks). There are also 'Pre Process Function' and 'Post Process Function' input fields, both currently empty. At the bottom, there is a checkbox for 'Use Proxy Authentication' and a 'Test Connection' button.

7. Click Apply and click Close. The private data source connection is now available for use in data sets as a defined data source.

Manage Private Data Sources

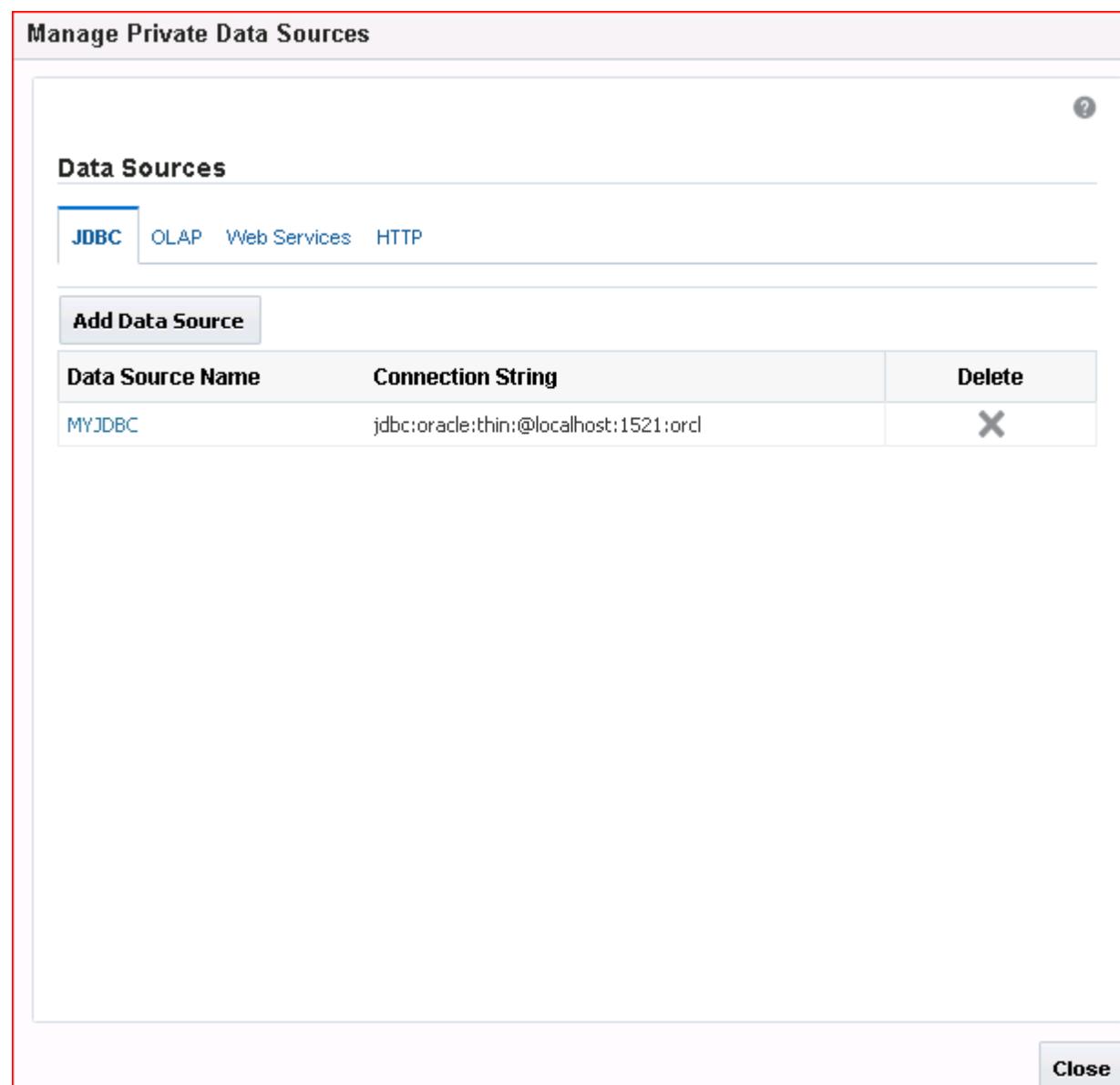
Data Sources

JDBC OLAP Web Services HTTP

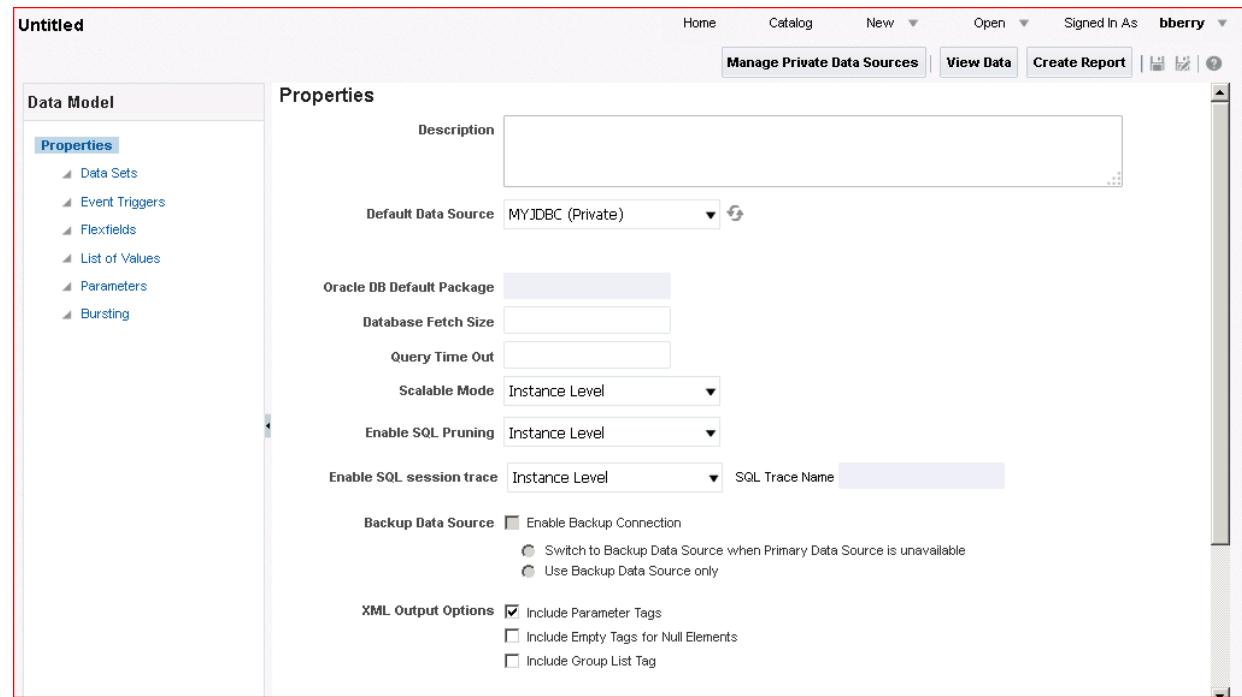
Add Data Source

Data Source Name	Connection String	Delete
MYJDBC	jdbc:oracle:thin:@localhost:1521:ord	X

Close



8. In the Data Model Editor, observe that the default data source is listed as MyJDBC (Private), indicating that this is a private connection.



Ensure that the Include Parameter Tags check box is selected for XML Output Options.

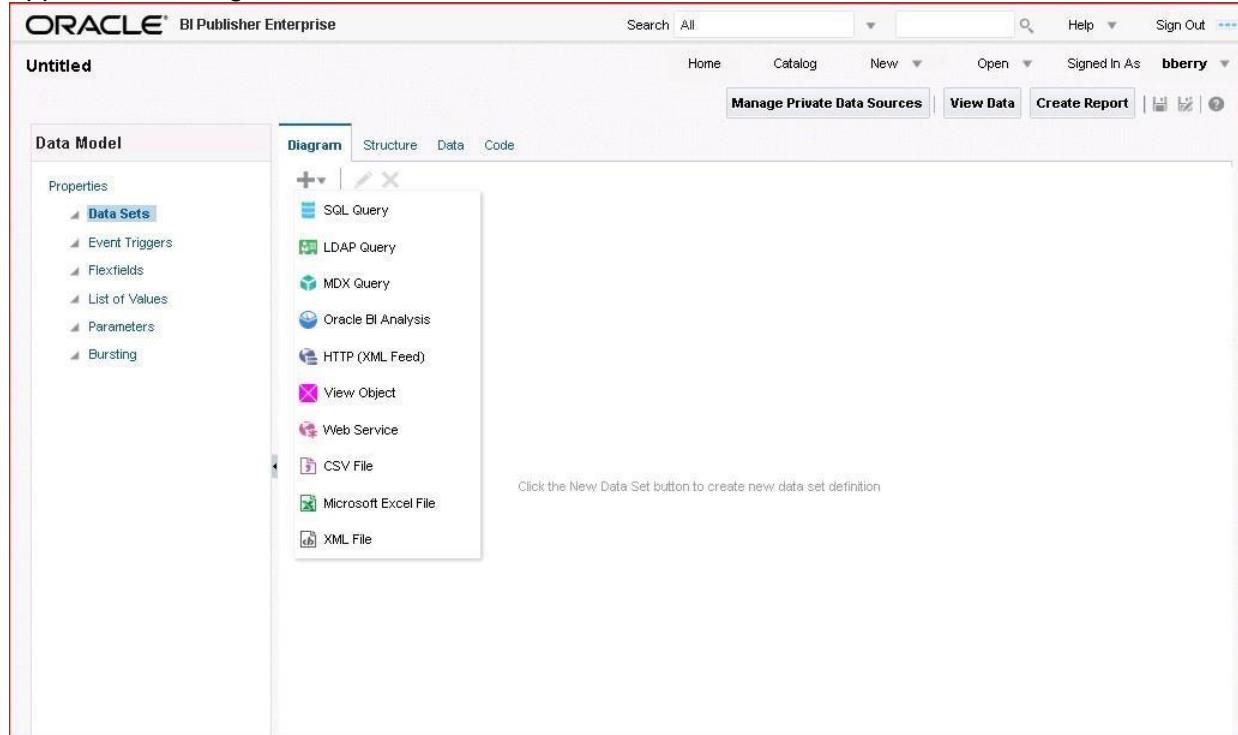
Practice 5-2: Defining a SQL Query Data Set

Overview

In this practice, you create a SQL query data set.

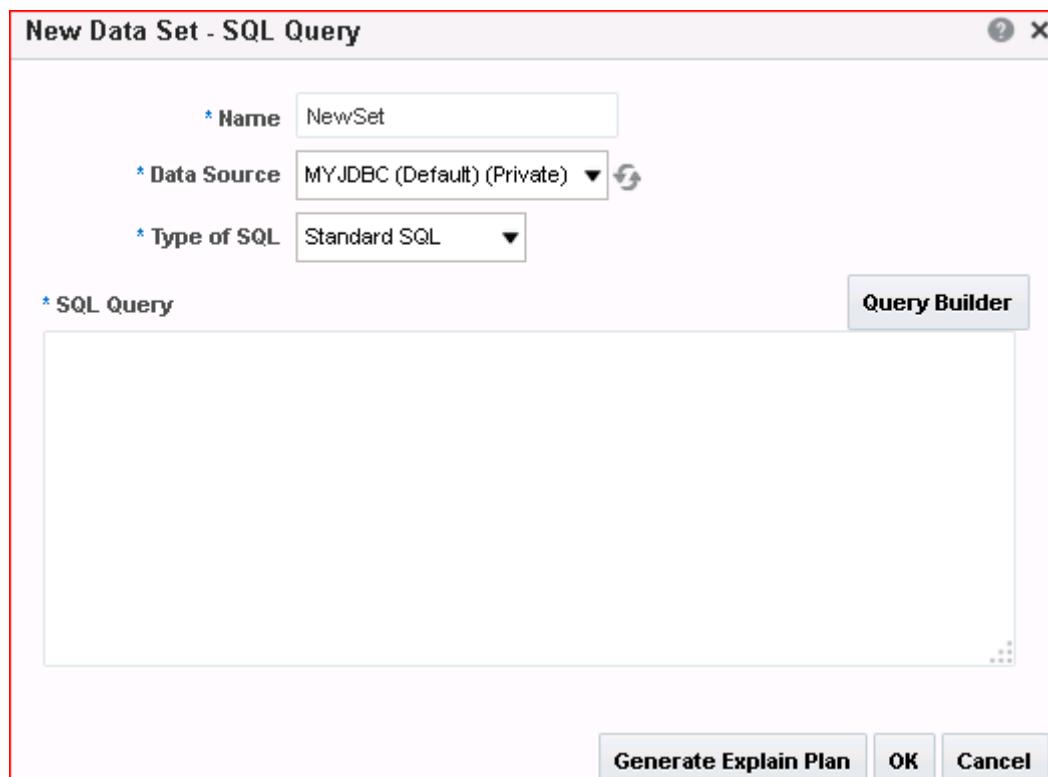
Tasks

1. In the Data Model pane on the left, select Data Sets. The working pane for Data Sets appears on the right.



2. From the New Data Set drop-down list, select SQL Query as the type of data set.

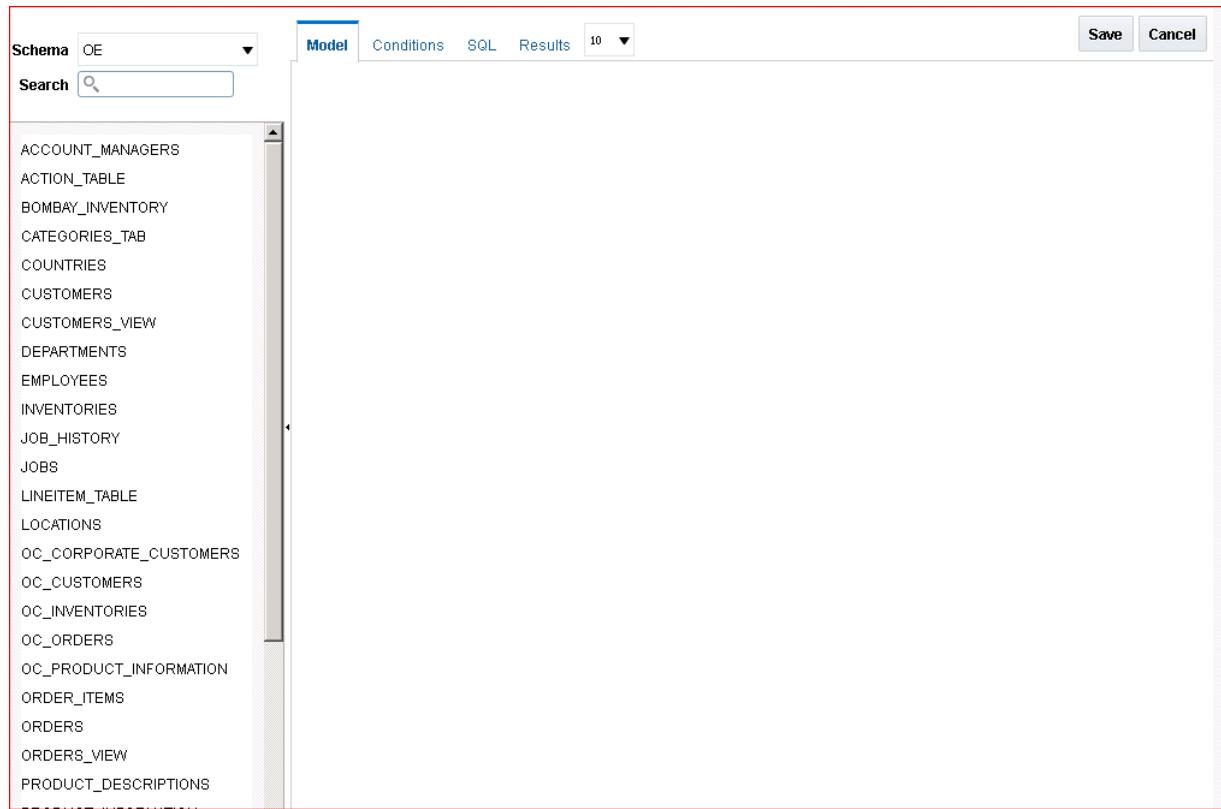
3. The New Data Set - SQL Query dialog box appears. Enter the name NewSet for the data set.



If you are not using the default data source for this data set, select the required data source from the list. In this example, you use the default data source MyJDBC (Private).

4. Click Query Builder to create a query.

The Query Builder window appears, displaying the **oe** schema objects in the left pane. Note the four tabs (links) on the right: Model, Conditions, SQL, and Results.



5. Click the DEPARTMENTS and EMPLOYEES tables to add them to the Model canvas on the right.

6. Define a join between these two tables as follows:

Step	Instructions
a.	Click the empty box to the right of the attribute type column for DEPARTMENT_ID in the DEPARTMENTS table. The box turns grey. 
b.	Click the empty box to the right of the attribute type column for DEPARTMENT_ID in the EMPLOYEES table. A fine line appears, indicating that a join has been created.

7. Select the check box to the left of the following columns from each table to select the column:
- **DEPARTMENT_NAME** from DEPARTMENTS
 - **FIRST_NAME, LAST_NAME, EMAIL, HIRE_DATE**, and **SALARY** from EMPLOYEES

The screenshot shows the Oracle Database Data Model Editor interface. At the top, there are tabs for Model, Conditions, SQL, and Results, with Model selected. To the right are Save and Cancel buttons. Below the tabs are two tables: DEPARTMENTS and EMPLOYEES. The DEPARTMENTS table has four columns: LOCATION_ID, MANAGER_ID, DEPARTMENT_NAME, and DEPARTMENT_ID. The EMPLOYEES table has six columns: FIRST_NAME, LAST_NAME, EMAIL, PHONE_NUMBER, HIRE_DATE, and SALARY. A red box highlights both tables. In the DEPARTMENTS table, the checkbox next to DEPARTMENT_NAME is checked. In the EMPLOYEES table, the checkboxes next to FIRST_NAME, LAST_NAME, EMAIL, and HIRE_DATE are checked.

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

EMPLOYEES	
<input checked="" type="checkbox"/>	FIRST_NAME
<input checked="" type="checkbox"/>	LAST_NAME
<input checked="" type="checkbox"/>	EMAIL
<input type="checkbox"/>	PHONE_NUMBER
<input checked="" type="checkbox"/>	HIRE_DATE
<input type="checkbox"/>	SALARY

8. Click the **Results** tab to view the query results, and then click **Save**.



The screenshot shows the Oracle Data Model Editor interface. The top navigation bar has tabs: Model, Conditions, SQL, and Results. The Results tab is selected, indicated by a blue border. To its right is a dropdown menu set to 10 rows. On the far right are Save and Cancel buttons. The main area displays a table of employee data:

DEPARTMENT_NAME	LAST_NAME	FIRST_NAME	EMAIL	HIRE_DATE	SALARY
Administration	Whalen	Jennifer	JWHALEN	2003-09-17 00:00:00.0	4400
Marketing	Hartstein	Michael	MHARTSTE	2004-02-17 00:00:00.0	13000
Marketing	Fay	Pat	PFAY	2005-08-17 00:00:00.0	6000
Purchasing	Raphaely	Den	DRAPHEAL	2002-12-07 00:00:00.0	11000
Purchasing	Khoo	Alexander	AKHOO	2003-05-18 00:00:00.0	3100
Purchasing	Baida	Shelli	SBAIDA	2005-12-24 00:00:00.0	2900
Purchasing	Tobias	Sigal	STOBIAS	2005-07-24 00:00:00.0	2800
Purchasing	Himuro	Guy	GHIMURO	2006-11-15 00:00:00.0	2600
Purchasing	Colmenares	Karen	KCOLMENA	2007-08-10 00:00:00.0	2500
Human Resources	Mavris	Susan	SMAVRIS	2002-06-07 00:00:00.0	6500

9. The New Data Set - SQL Query dialog box reappears. Observe that the SQL code is automatically created for you and is reflected in the SQL Query pane of the dialog box.



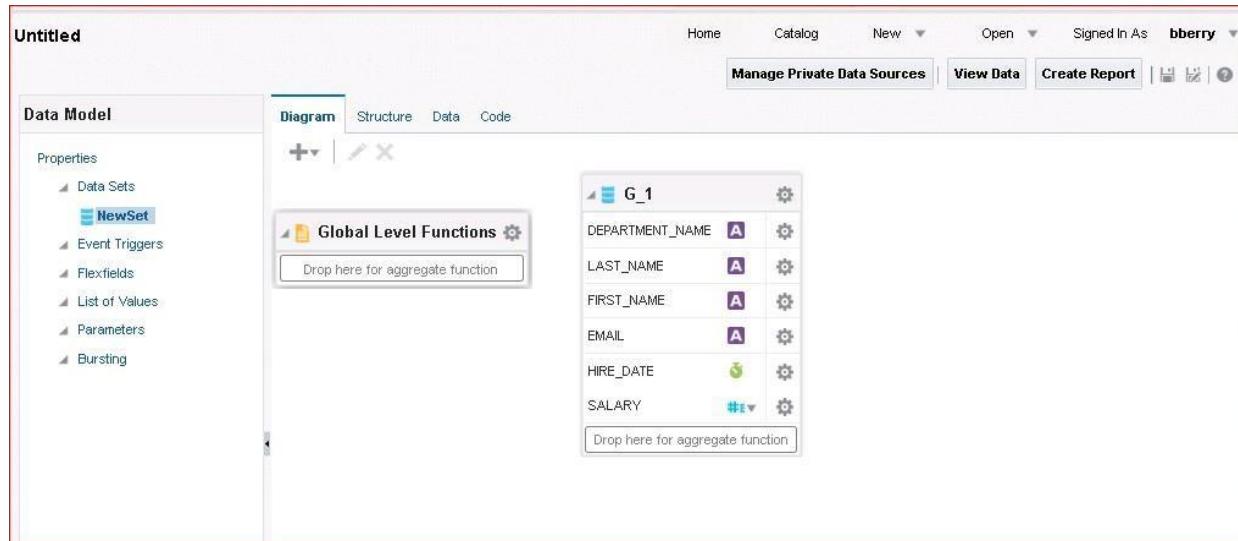
The screenshot shows the New Data Set - SQL Query dialog box. It has several configuration fields at the top: Name (NewSet), Data Source (MYJDBC (Default) (Private)), and Type of SQL (Standard SQL). Below these is a large text area labeled "SQL Query" containing the generated SQL code:

```

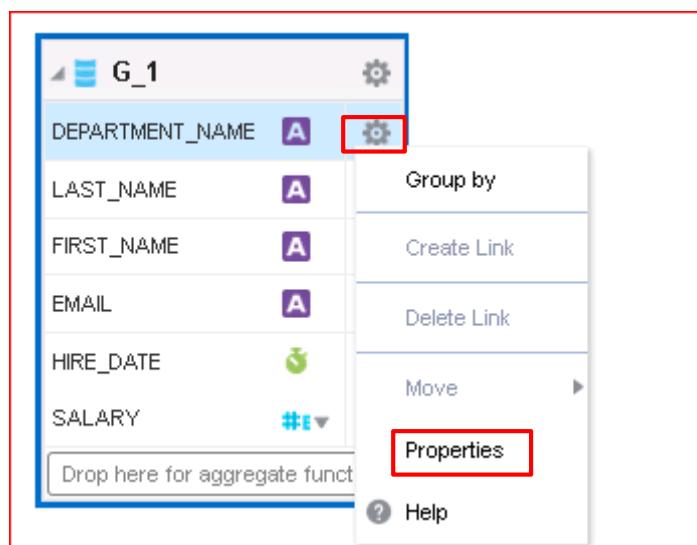
select    "DEPARTMENTS"."DEPARTMENT_NAME" as "DEPARTMENT_NAME",
          "EMPLOYEES"."LAST_NAME" as "LAST_NAME",
          "EMPLOYEES"."FIRST_NAME" as "FIRST_NAME",
          "EMPLOYEES"."EMAIL" as "EMAIL",
          "EMPLOYEES"."HIRE_DATE" as "HIRE_DATE",
          "EMPLOYEES"."SALARY" as "SALARY"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

At the bottom of the dialog are three buttons: Generate Explain Plan, OK, and Cancel.

10. Click **OK** to add this data set to the data model. The Diagram tab reappears with your data set.



11. Change the names of the columns to make them user-friendly. Click the double-headed arrow (next to DEPARTMENT_NAME and select **Properties**.



The Edit Properties dialog box appears.

12. Enter Department Name as the Display Name.

Edit Properties - DEPARTMENT_NAME

*Column Name	DEPARTMENT NAME
*Alias	DEPARTMENT_NAME
Display Name	Department Name
Data Type	String
Sort Order	No Ordering
Value If Null	

OK Cancel

13. Click OK

14. Use the Structure tab to change the display names for each of the following columns:

Step	Column Name	Value
a.	FIRST_NAME	First Name
b.	LAST_NAME	Last Name
c.	EMAIL	Email
d.	HIRE_DATE	Hire Date
e.	SALARY	Salary

Diagram **Structure** Data Code

Table View | Output

Data Source	XML Tag Name	XML View		Business View		
		Sorting	Value If Null	Display Name	Data Type	
Report Data						
Data Structure	DATA_DS					
NewSet	G_1					
A DEPARTMENT_NAME	DEPARTMENT_NAME			Department Name	A	
A LAST_NAME	LAST_NAME			Last Name	A	
A FIRST_NAME	FIRST_NAME			First Name	A	
A EMAIL	EMAIL			Email	A	
G HIRE_DATE	HIRE_DATE			Hire Date	G	
#S SALARY	SALARY	↓		Salary	#E	

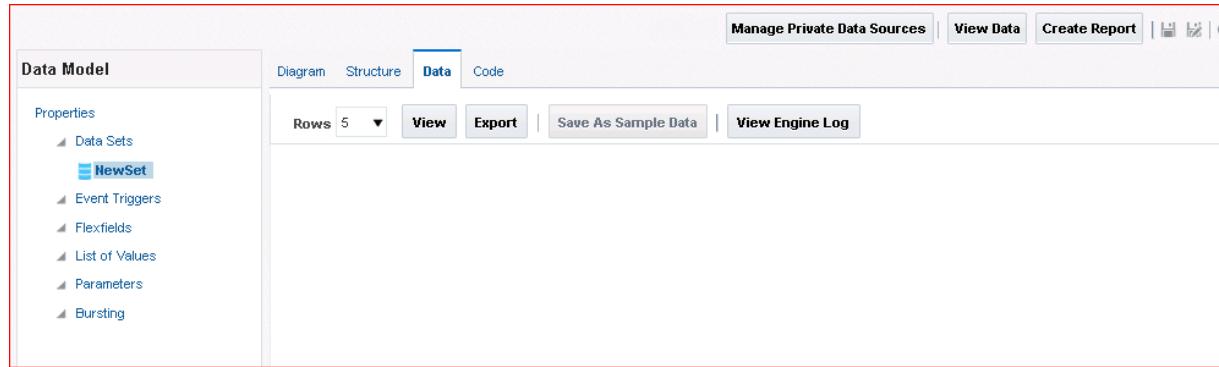
Practice 5-3: Viewing the Output and Saving Sample Data for the Data Model

Overview

In this practice, you view the data and save the sample data. You also save the data model.

Tasks

1. Click the **Data** tab.



2. Select the number of rows that you want to display for the data, and click **View**.

The screenshot shows the Data Model Editor with the 'Data' tab selected. At the top, there are buttons for 'Manage Private Data Sources', 'View Data', 'Create Report', 'Diagram', 'Structure', 'Data' (which is highlighted in blue), and 'Code'. Below these are buttons for 'Rows' (set to 5), 'View', 'Export', 'Save As Sample Data', and 'View Engine Log'. The main area displays a hierarchical tree view under 'DATA_DS'. The first node is 'G_1' which contains 'DEPARTMENT_NAME (Administration)', 'LAST_NAME (Whalen)', 'FIRST_NAME (Jennifer)', 'EMAIL (JWHALEN)', 'HIRE_DATE (2003-09-17T00:00:00.000+00:00)', and 'SALARY (4400)'. The second 'G_1' node contains 'DEPARTMENT_NAME (Marketing)', 'LAST_NAME (Hartstein)', 'FIRST_NAME (Michael)', 'EMAIL (MHARTSTE)', 'HIRE_DATE (2004-02-17T00:00:00.000+00:00)', and 'SALARY (13000)'. The third 'G_1' node contains 'DEPARTMENT_NAME (Marketing)' and 'LAST_NAME (Fay)'.

3. Click **Save As Sample Data**. You receive a confirmation prompt that this data is saved as sample data. Click **OK**.

The screenshot shows the same Data Model Editor interface as the previous one, but with the 'Save As Sample Data' button highlighted. A modal dialog box titled 'Info' is displayed in the center. It contains the message 'Saved as Sample Data' and an 'OK' button. The background interface remains the same, showing the hierarchical tree view under 'DATA_DS'.

4. Click the Properties node in the left pane to view the Properties page. You can see that the sample.xml file is listed under the Attachment section.

This is the sample data that you just saved.

The screenshot shows the 'Properties' tab selected in the left sidebar of the Data Model Editor. The main area contains various configuration options:

- Oracle DB Default Package: [Input Field]
- Database Fetch Size: [Input Field]
- Query Time Out: [Input Field]
- Scalable Mode: Instance Level
- Enable SQL Pruning: Instance Level
- Enable SQL session trace: Instance Level, SQL Trace Name: [Input Field]
- 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 section:

- Sample Data: sample.xml
- Schema: [Upload Button]
- Data Files: [List]
- Delete: [Delete Button]

5. Click the Save icon to save the data model.

The screenshot shows the 'Save As' dialog box. On the left is a 'Catalog' tree view with the following structure:

- My Folders
 - Temp
 - Drafts
 - My DataModel
- Shared Folders

On the right, there are fields for 'Name' (NewDMSQL) and 'Description'. At the bottom are 'Save' and 'Cancel' buttons.

Select My Folders in the Save As dialog box, and provide the name NewDMSQL.

Note: Observe that you do not have access to the Learn folder that you created in the previous practice.

The BIAuthor user does not have privileges to use folders created by the weblogic Administrator user.

Practice 5-4: Editing the Data Model to Add a Parameter and an LOV

Overview

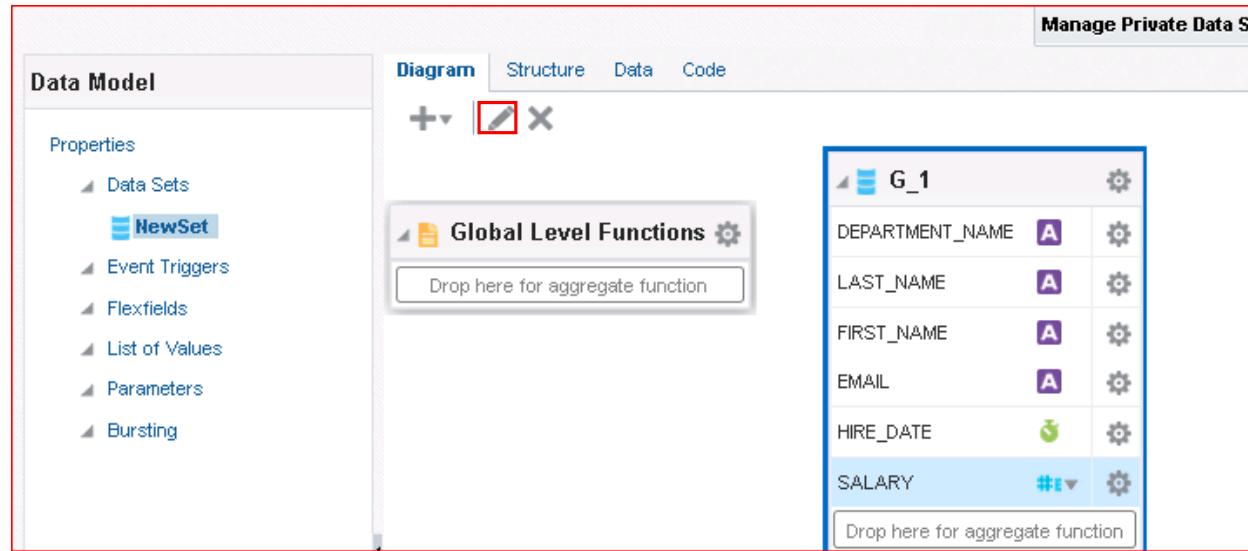
In this practice, you add a parameter and a list of values (LOV) to your NewDMSQL data model.

Tasks

1. Add a bind parameter for the Department Name column.

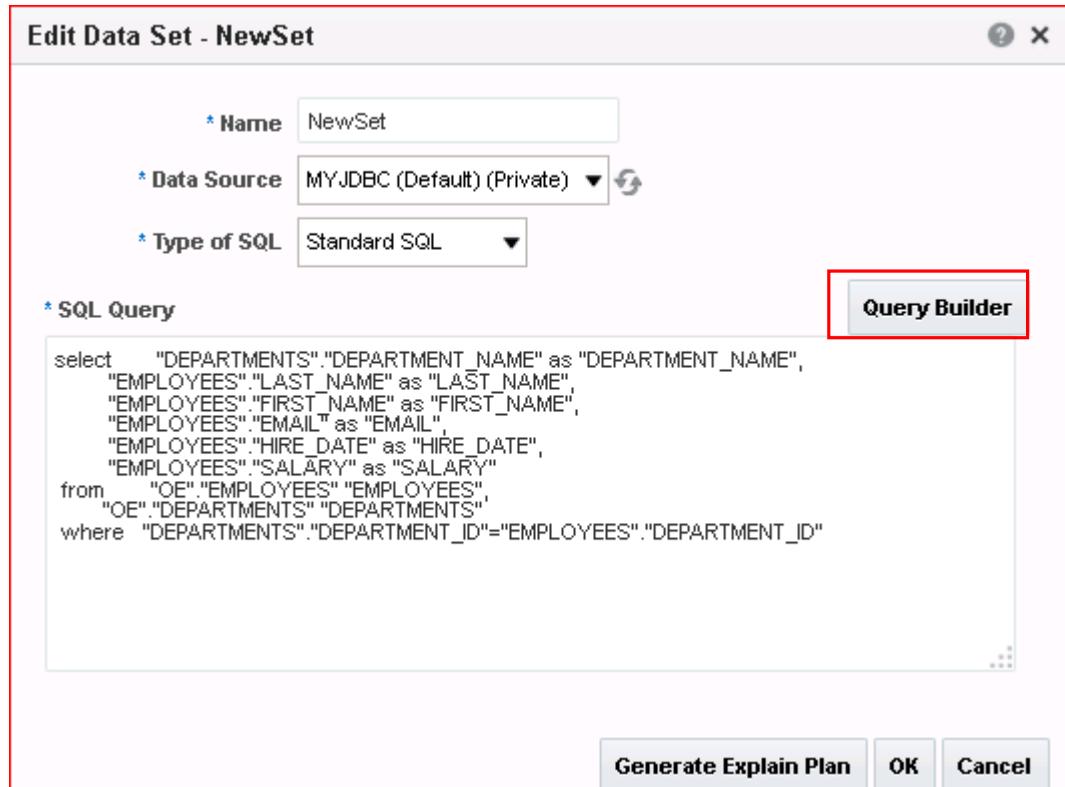
You can add a parameter by clicking the Parameters node in the Data Model pane and entering the details for the parameter, or by using the Query Builder - Conditions tab.

To edit the query by using Query Builder, select the **NewSet** data set and click **Edit** ().



The screenshot shows the Oracle Data Model Editor interface. On the left, the 'Data Model' pane is open, displaying a tree structure with nodes like 'Properties', 'Data Sets' (with 'NewSet' selected), 'Event Triggers', 'Flexfields', 'List of Values', 'Parameters', and 'Bursting'. In the center, the 'Diagram' tab is active, showing a table structure named 'G_1' with columns: DEPARTMENT_NAME, LAST_NAME, FIRST_NAME, EMAIL, HIRE_DATE, and SALARY. The 'SALARY' column has a dropdown arrow icon, indicating it is a parameter. Below the table, there are two boxes labeled 'Drop here for aggregate function'. On the right, a 'Manage Private Data Sc...' button is visible.

2. Click **Query Builder** when the Edit Data Set – NewSet dialog box appears.



3. Click the **Conditions** tab and, in the Condition text box for Department Name, enter **IN (:P_DNAME)**.

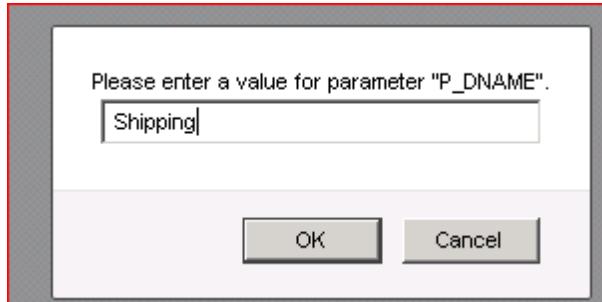
This creates a bind parameter, **P_DNAME**, on the Department Name column.

The “**IN**” condition allows the parameter to accept all or multiple values for the Department Name column.

Column	Alias	Object	Condition	Sort Type
DEPARTMENT_NAME	DEPARTMENT_NAME	DEPARTMENTS	IN (:P_DNAME)	ASC
LAST_NAME	LAST_NAME	EMPLOYEES		ASC
FIRST_NAME	FIRST_NAME	EMPLOYEES		ASC
EMAIL	EMAIL	EMPLOYEES		ASC
HIRE_DATE	HIRE_DATE	EMPLOYEES		ASC
SALARY	SALARY	EMPLOYEES		ASC

4. Click the **Results** tab to view the query results.

5. You are prompted to enter a value for the parameter.



Enter **Shipping** and click **OK**.

6. The results appear.

DEPARTMENT_NAME	LAST_NAME	FIRST_NAME	EMAIL	HIRE_DATE	SALARY
Shipping	Weiss	Matthew	MWEISS	2004-07-18 00:00:00.0	8000
Shipping	Fripp	Adam	AFRIPP	2005-04-10 00:00:00.0	8200
Shipping	Kaufling	Payam	PKAUFLIN	2003-05-01 00:00:00.0	7900
Shipping	Vollman	Shanta	SVOLLMAN	2005-10-10 00:00:00.0	6500
Shipping	Mourgos	Kevin	KMOURGOS	2007-11-16 00:00:00.0	5800
Shipping	Nayer	Julia	JNAYER	2005-07-16 00:00:00.0	3200
Shipping	Mikkilineni	Irene	IMIKKILI	2006-09-28 00:00:00.0	2700
Shipping	Landry	James	JLANDRY	2007-01-14 00:00:00.0	2400
Shipping	Markle	Steven	SMARKLE	2008-03-08 00:00:00.0	2200
Shipping	Bissot	Laura	LBISSOT	2005-08-20 00:00:00.0	3300

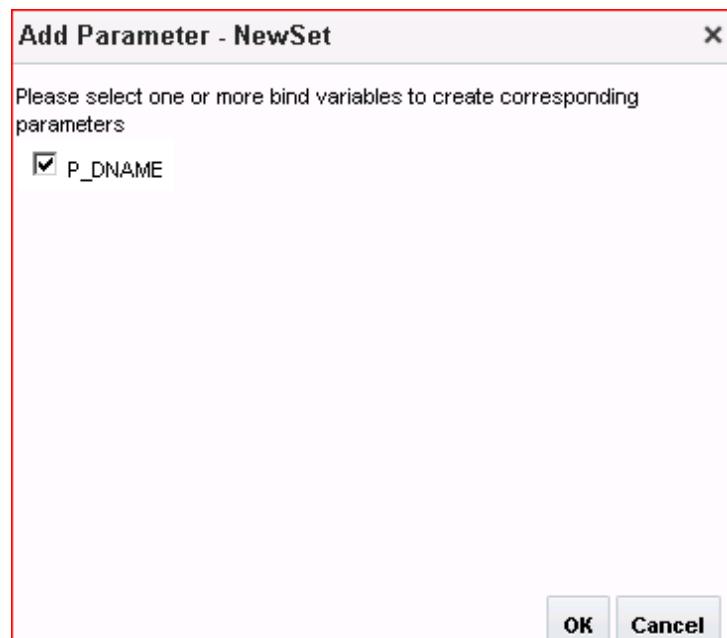
Click **Save**.

7. The Edit Data Set dialog box reappears. Notice that your parameter is reflected in the SQL Query pane.



Click **OK**.

8. A message dialog box appears asking you to select the bind variable for the parameter that you created. Select **P_DNAME** and click **OK**.



The bind parameter appears in the Data Model pane.

Name	Data Type	Default Value	Parameter Type	Row Placement	Reorder
P_DNAME	String		Text	1	▲▼

P_DNAME: Type: Text

Display Label:

Text Field Size:

Options:

- Text field contains comma-separated values
- Refresh other parameters on change

9. The next step is to create an LOV. Select **List of Values** in the Data Model pane.

10. The List of Values pane appears in the workspace on the right.

Click **Create a new list of values** (+) as indicated in the screenshot.

Name	Type	Data Source	Reorder
DepName	SQL Query	MYJDBC (Private)	▲▼

New_List_of_Value 1: Type: SQL Query

Options: Cache Result

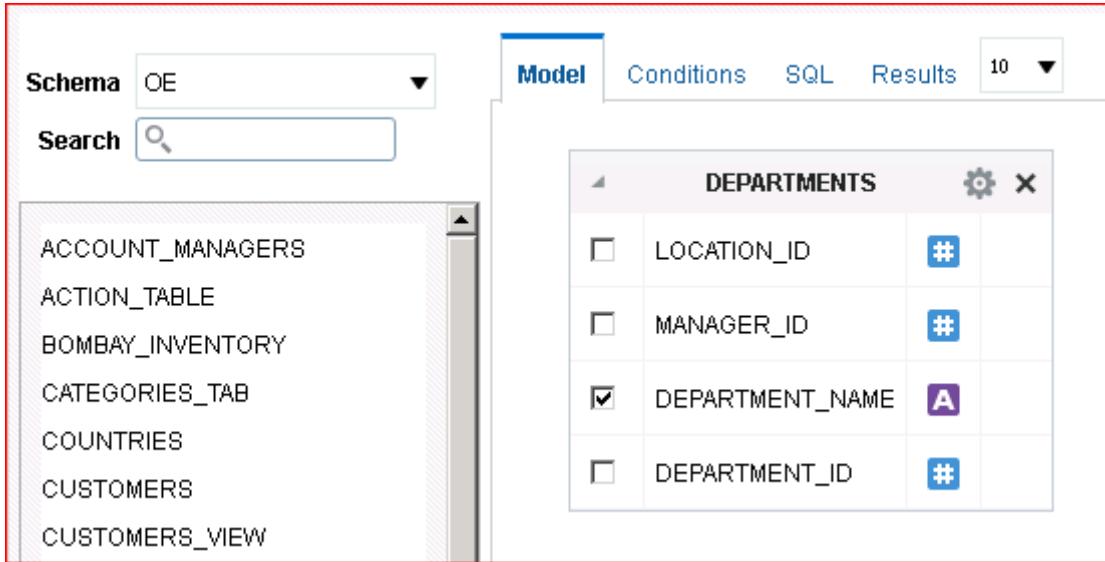
SQL Query:

QueryBuilder

11. In the **List of Values** table, enter the following details:

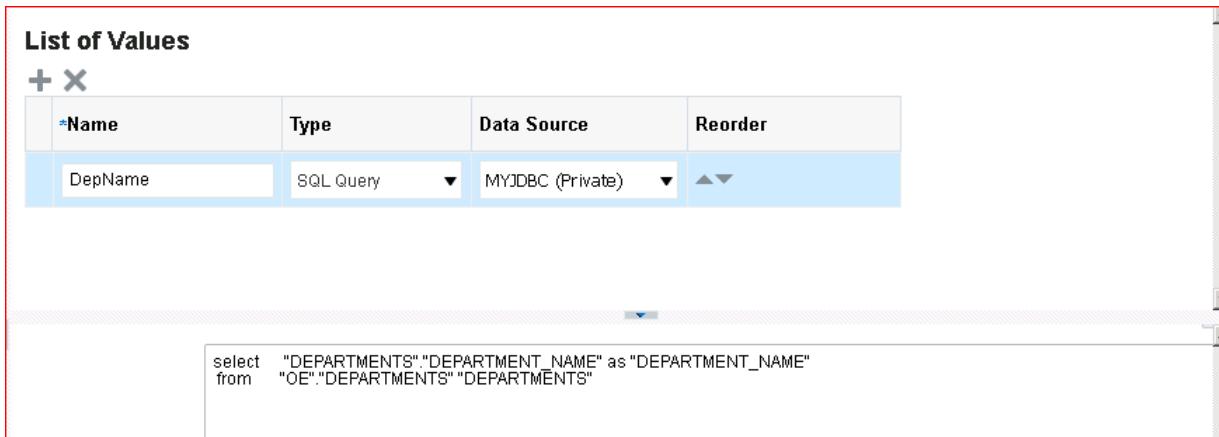
Step	Field Name	Values
a.	Name	DepName
b.	Type	SQL Query
c.	Data Source	MyJDBC (Private)

12. Click **Query Builder** () to define the query that returns Department Name values for the LOV.
Query Builder appears.



The screenshot shows the Oracle Data Model Editor interface. The top navigation bar includes 'Model' (which is selected), 'Conditions', 'SQL', and 'Results'. A dropdown menu shows '10' with a downward arrow. On the left, a sidebar lists various tables: ACCOUNT_MANAGERS, ACTION_TABLE, BOMBAY_INVENTORY, CATEGORIES_TAB, COUNTRIES, CUSTOMERS, and CUSTOMERS_VIEW. The main area displays the 'DEPARTMENTS' table with four columns: LOCATION_ID, MANAGER_ID, DEPARTMENT_NAME, and DEPARTMENT_ID. The 'DEPARTMENT_NAME' column has a checked checkbox next to it, indicating it is selected for the LOV.

13. Click **DEPARTMENTS** and select **DEPARTMENT_NAME** in the table.
14. Click **Save**.
The List of Values pane reappears with the query for the LOV reflected in the SQL Query pane at the bottom of the page.



The screenshot shows the 'List of Values' pane. It contains a table with a single row. The row has columns for Name ('DepName'), Type ('SQL Query'), Data Source ('MYJDBC (Private)'), and Reorder. Below the table, the SQL query is displayed in a code editor:

```
select "DEPARTMENTS"."DEPARTMENT_NAME" as "DEPARTMENT_NAME"
from "OE"."DEPARTMENTS" "DEPARTMENTS"
```

15. Now you set the properties for the P_DNAME parameter to use this LOV.

Select P_DNAME in the Parameters node of the Data Model pane.

Observe that the bottom pane for the parameter is not displaying any list of values, because the parameter type is yet to be chosen.

The screenshot shows the Oracle Data Model Editor's Parameters workspace. On the left, the Properties sidebar lists various nodes like Data Sets, Event Triggers, Flexfields, List of Values, and Parameters. Under Parameters, 'P_DNAME' is selected. The main area displays a table with columns: Name, Data Type, Default Value, Parameter Type, Row Placement, and Reorder. The 'Parameter Type' column for P_DNAME has a dropdown menu open, showing 'Text', 'Menu' (which is highlighted in blue), and 'Date'. Below the table, a section titled 'P_DNAME: Type: Text' contains fields for 'Display Label' and 'Text Field Size', and two optional checkboxes: 'Text field contains comma-separated values' and 'Refresh other parameters on change'.

16. Enter Shipping in the Default Value text box for P_DNAME and select **Menu** as the Parameter Type.

17. In the lower half of the Parameters workspace, select the following:

Step	Field Name	Values or Actions
a.	Display Label	Enter Department Name
b.	List of Values	Select DepName
c.	Multiple Selection	Select the check box.
d.	Can select all	Select the check box.
e.	All Values Passed	Select the option button.

Parameters

P_DNAME: Type: Menu

Name	Data Type	Default Value	Parameter Type	Row Placement	Reorder
P_DNAME	String	Shipping	Menu	1	▲▼

Display Label: Enter Department Name

List of Values: DepName

Number of Values to Display in List: 100

Options:

- Multiple Selection
- Can select all
- NULL Value Passed
- All Values Passed

Refresh other parameters on change

18. Click the Save icon to save the data model. Note that, at any time, you can use the Save As icon to save the data model with a new name.

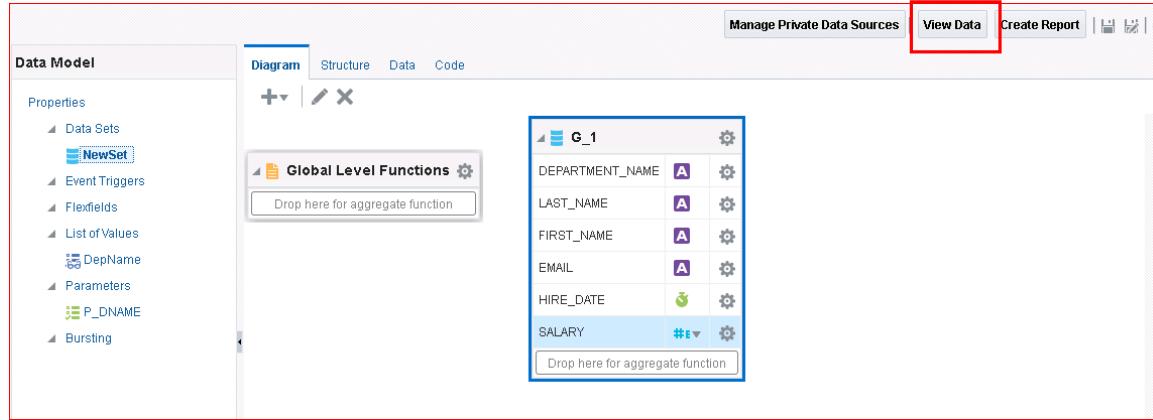
Practice 5-5: Creating a Report Based on the NewDMSQL Data Model

Overview

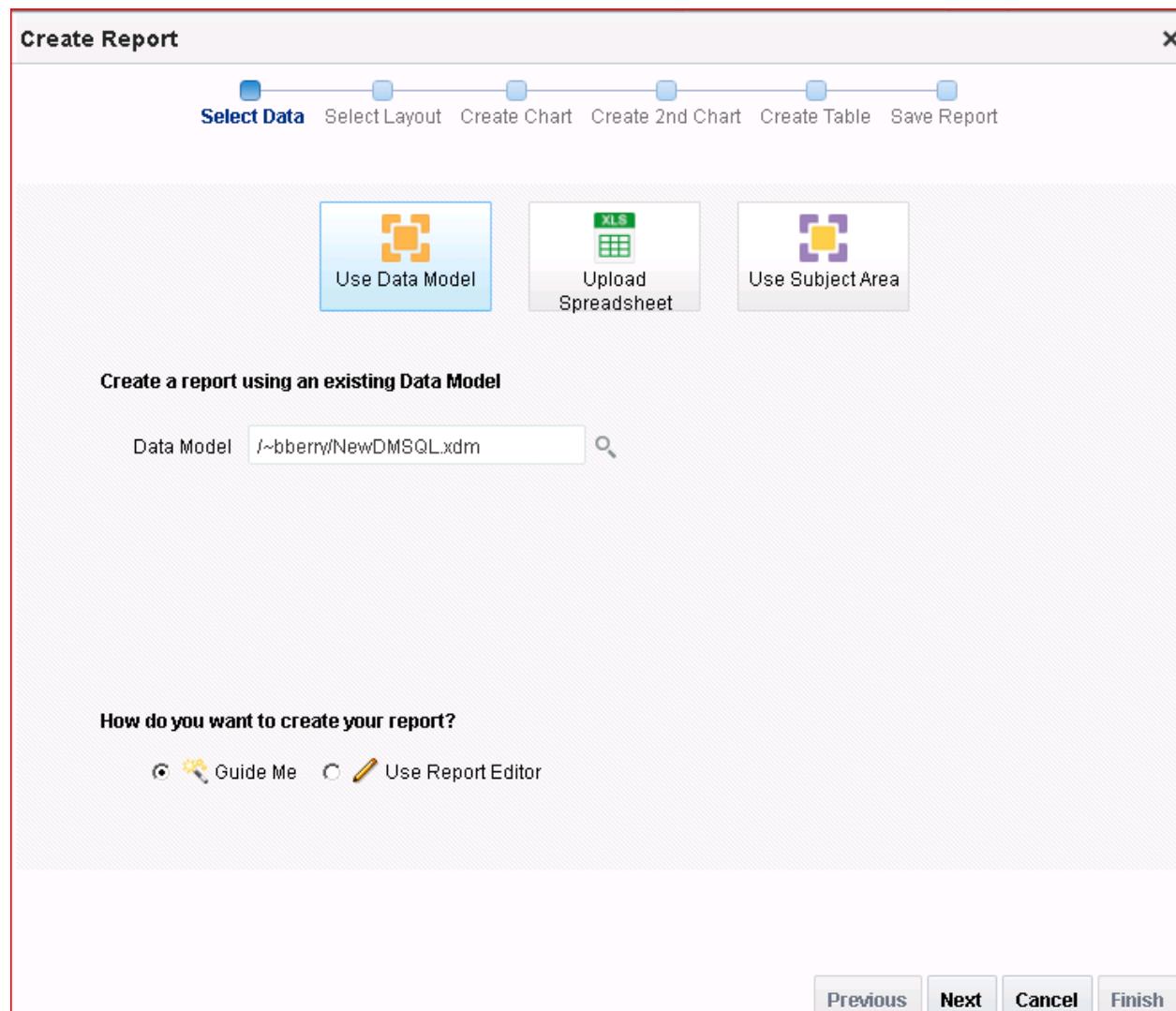
In this practice, you use the Create Report Wizard to create a report using the NewDMSQL data model, and then you view the report in Report Viewer.

Tasks

1. Click Create Report on the toolbar.

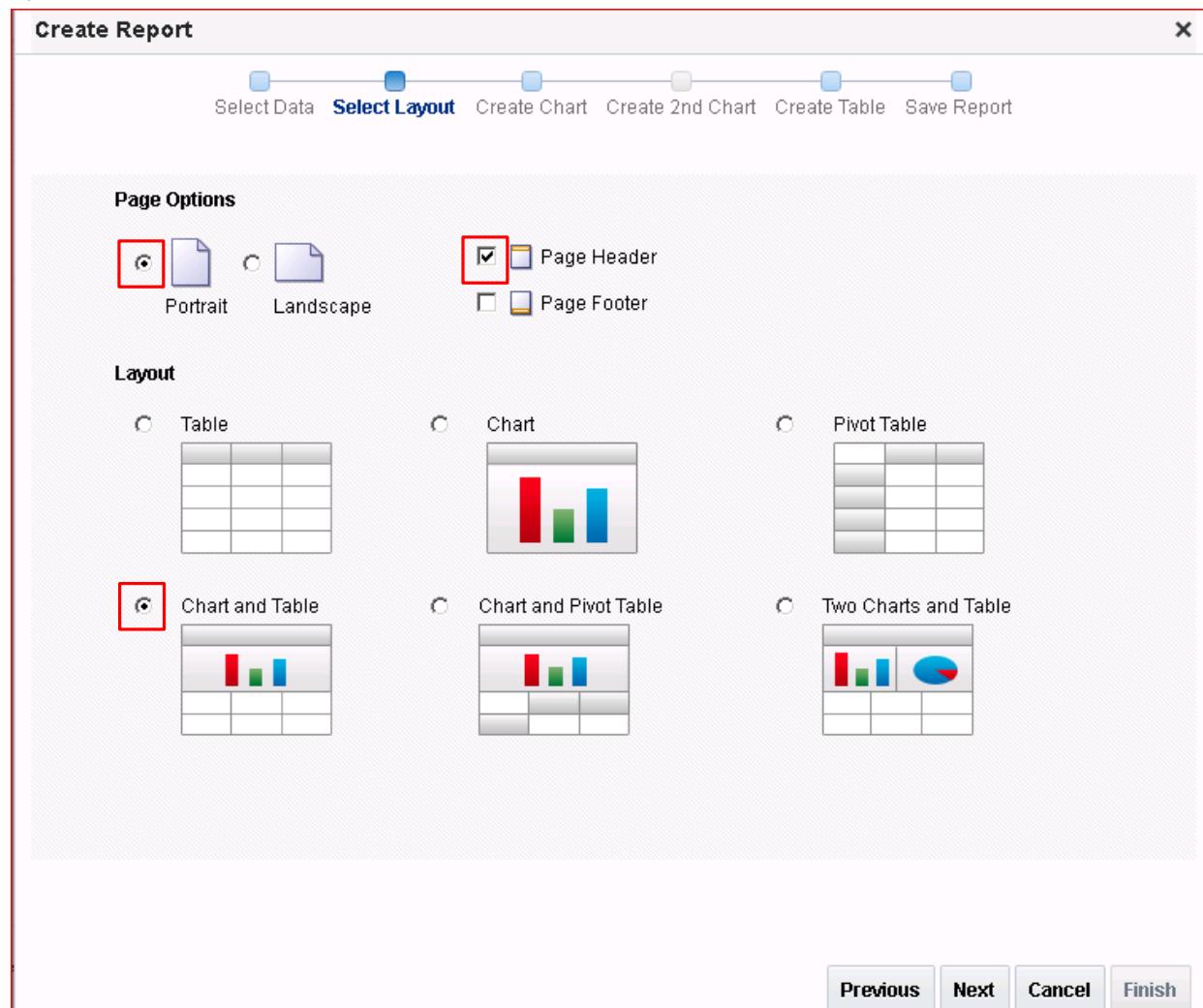


2. This launches the Report Wizard to create a new report and automatically populates the Data Model field with the current data model name.



3. Click Next to select the layout and other components for the report.

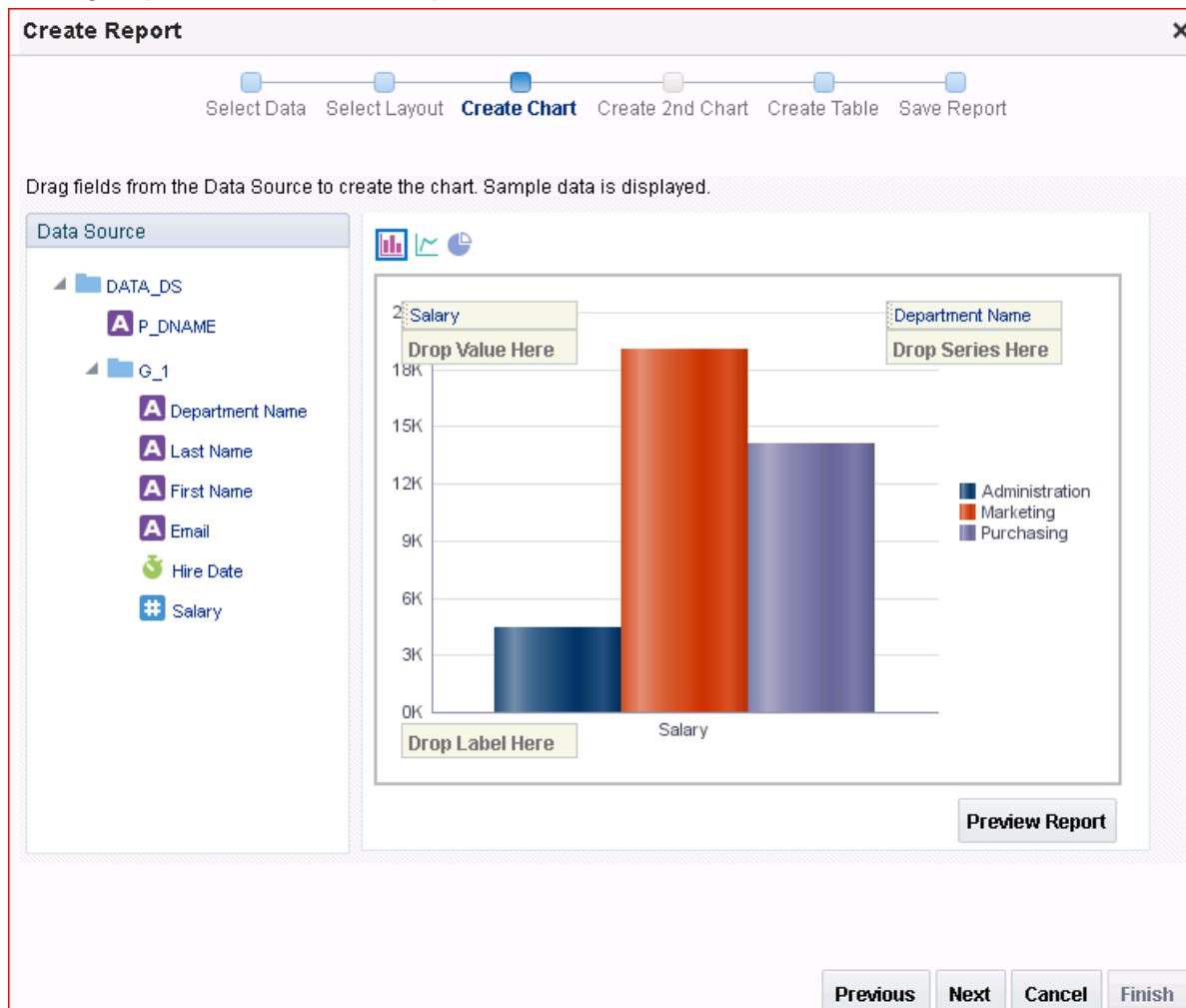
4. Select the options as shown in the screenshot to include a chart and a table in the Portrait layout.



5. Click Next.

6. Select Bar Chart and drop the values as given below:

- Drag Salary to Drop Value Here.
- Drag Department Name to Drop Series Here.



The chart is displayed with the selected data.

7. Click Next to select columns for the table.

8. Add the columns First Name, Email, and Hire Date to the table (after Department Name).

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

	Department Name	First Name	Email	Hire Date	Salary
A	Administration	Jennifer	JWHALEN	2003-09-17T00:00:	
A	Marketing	Michael	MHARTSTE	2004-02-17T00:00:	
A	Marketing	Pat	PFAY	2005-08-17T00:00:	
A	Purchasing	Den	DRAPHEAL	2002-12-07T00:00:	
A	Purchasing	Alexander	AKHOO	2003-05-18T00:00:	

Department Name First Name Email Hire Date Salary

Administration Jennifer JWHALEN 2003-09-17T00:00:

Marketing Michael MHARTSTE 2004-02-17T00:00:

Marketing Pat PFAY 2005-08-17T00:00:

Purchasing Den DRAPHEAL 2002-12-07T00:00:

Purchasing Alexander AKHOO 2003-05-18T00:00:

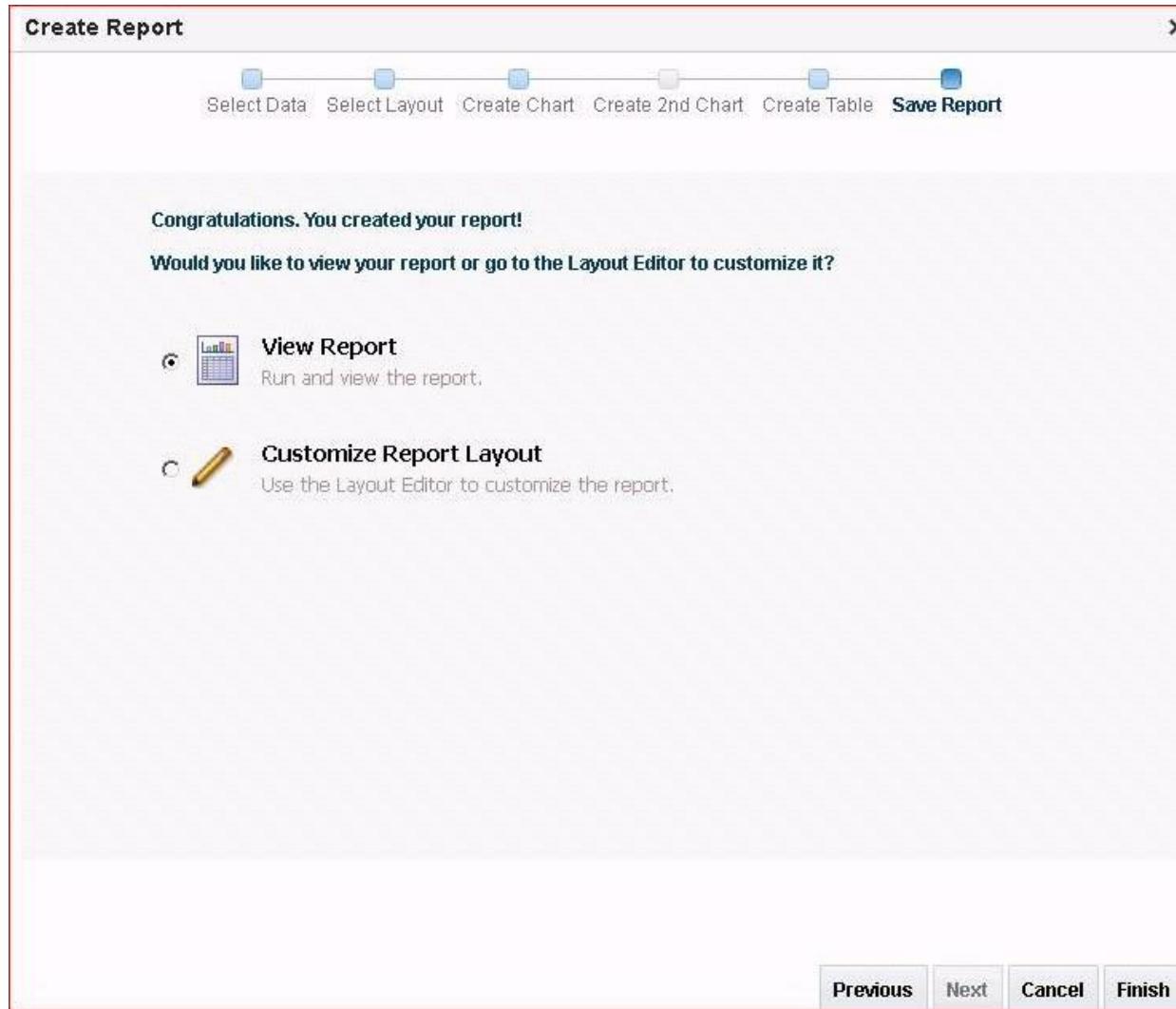
Show Grand Totals Row **Preview Report**

Previous Next Cancel Finish

The screenshot shows the 'Create Report' wizard in Oracle Database Report Builder. The current step is 'Create Table'. The 'Data Source' pane on the left lists fields from 'DATA_DS': P_DNAME, G_1, Last Name, First Name, Email, Hire Date, and Salary. The main pane shows a sample data grid with five rows of employee information. The bottom navigation bar includes 'Previous', 'Next', 'Cancel', and 'Finish' buttons.

9. Click Next.

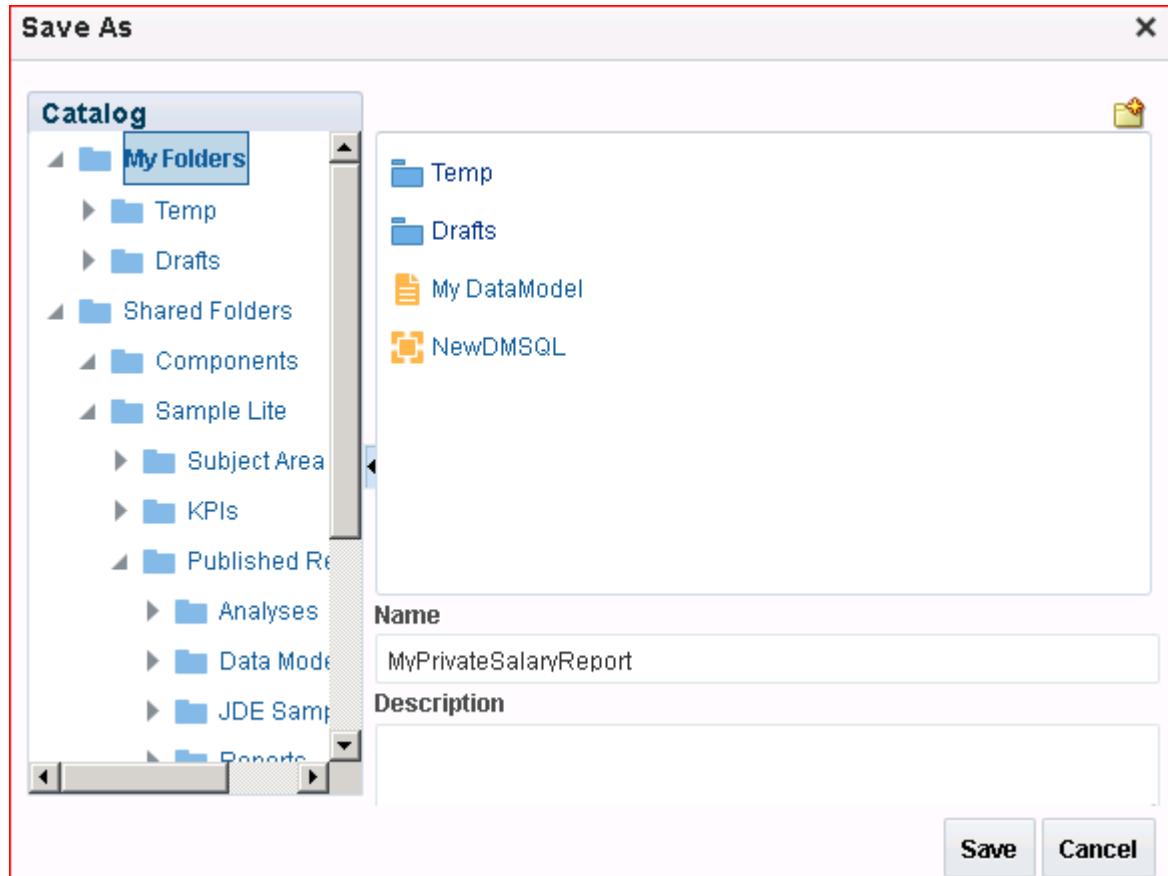
10. You are prompted to save the report to complete the last step in the Create Report Wizard.



Click View Report.

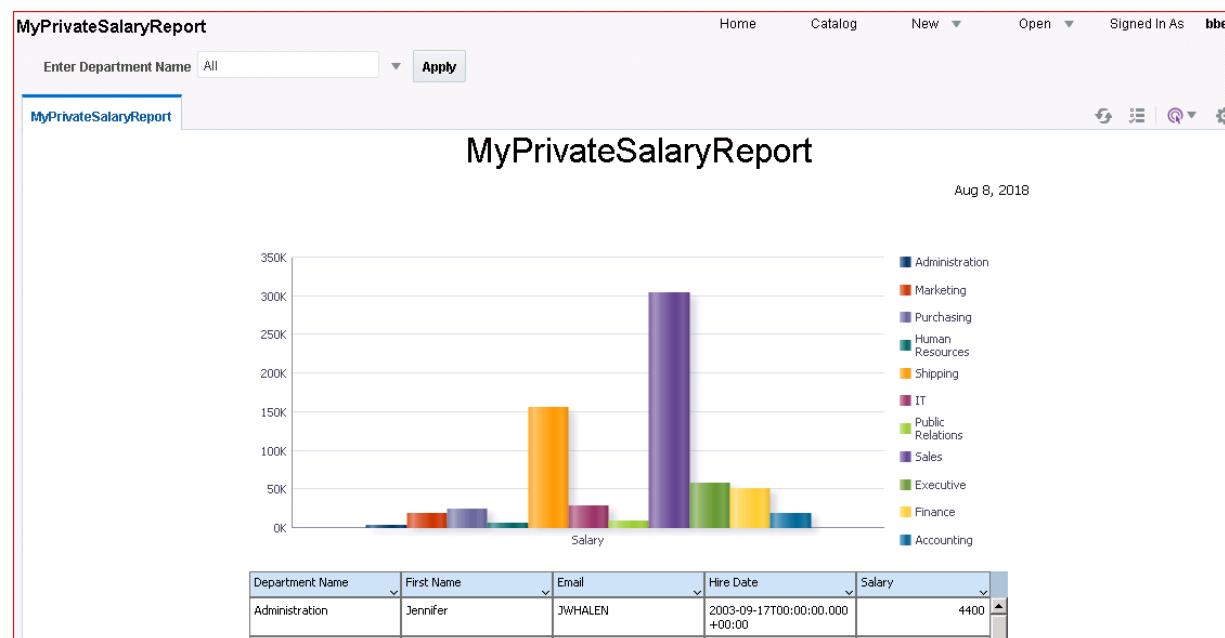
11. Click Finish to save the report.

12. Save the report as MyPrivateSalaryReport under My Folders.



The report is saved and displayed in the Report Viewer window.

Observe that you can change the default parameter display in Report Viewer. The following screenshot shows the report with all departments selected.



You can edit the report to change the layout, data model, scheduling properties, and so on.

Use the Actions menu to select various options to edit the report.



Layout Editor options are covered in “Practices for Lesson 5: Working with Layout Editor.”

Practices for Lesson 6: Working with Layout Editor

Practices for Lesson 6: Overview

Goal

To explore BI Publisher Layout Editor and to create and save BI Publisher report layouts

Practices Overview

You explore Layout Editor's capabilities by opening an existing report and formatting the layout, which contains data tables, charts, conditional formatting, and so on.

Time

75–85 minutes

Practice 6-1: Adding a Chart to a Predefined Layout

Overview

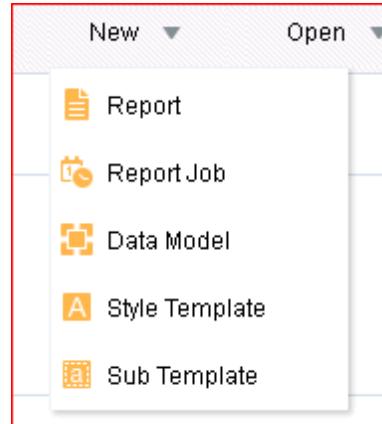
In this practice, you will use the Report Wizard to create a report based on the Salary Report Datamodel. You will edit this report in Layout Editor.

Assumptions

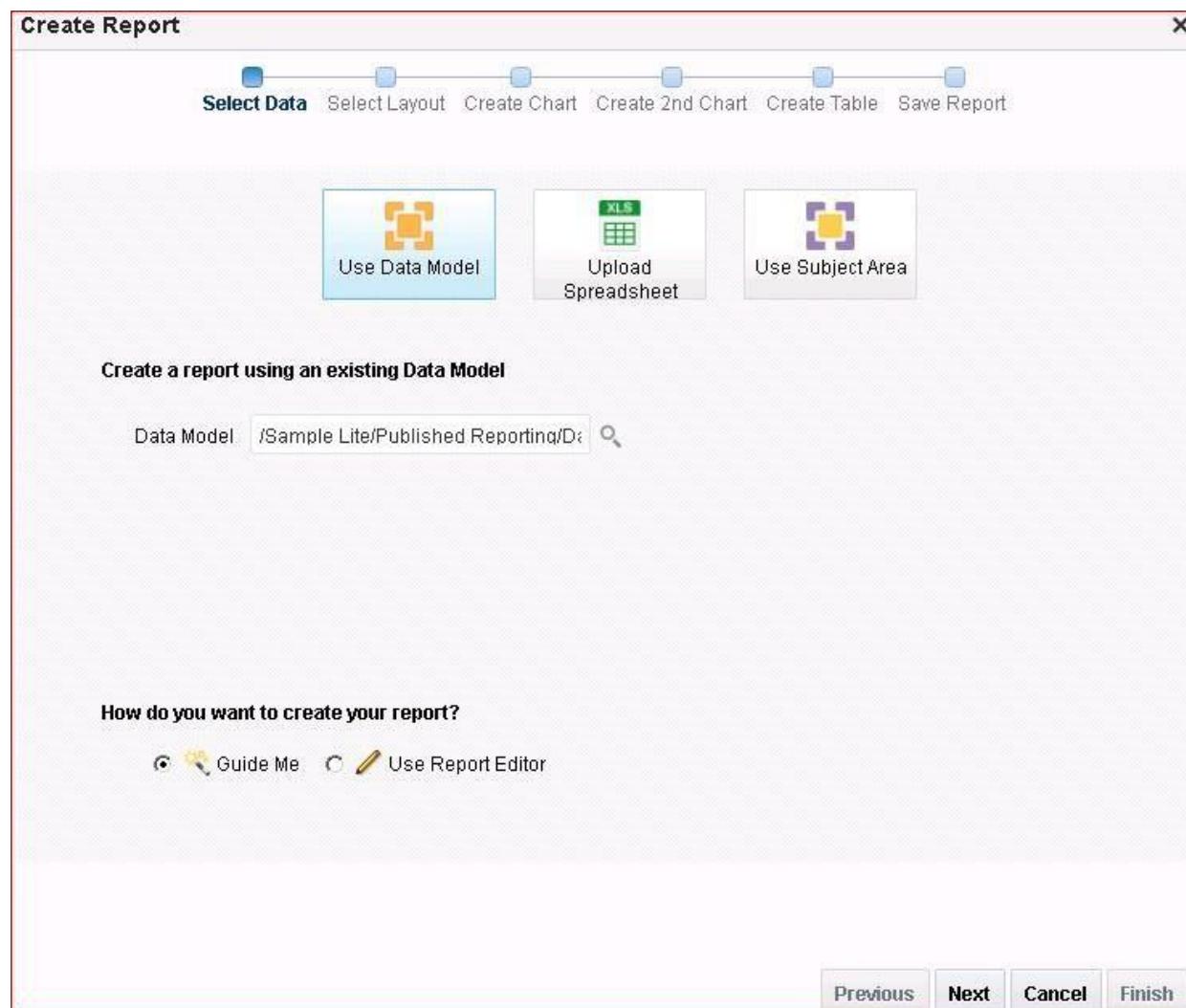
- You are familiar with using Create Report Wizard to create a simple report.
- The data model selected for the report is Salary Parameter Datamodel (Shared Folders > Sample Lite > Published Reporting > Data Models > Salary Report Datamodel).

Tasks

1. Log in to BI Publisher with the username `weblogic` and password `weblogic1`.
2. Click **New > Report** in the global header.



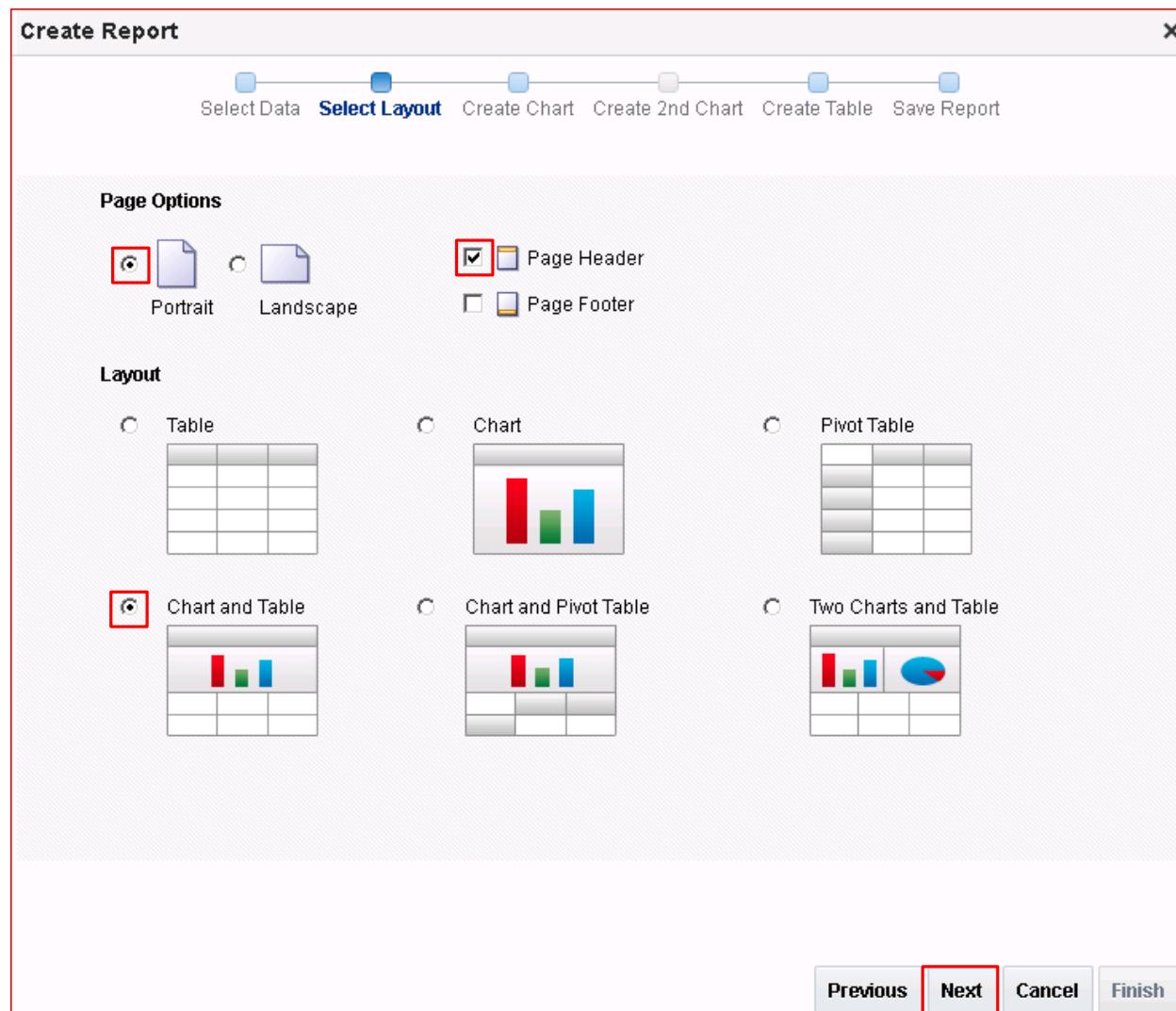
3. The Create Report window is opened. You create a report by using the existing data model
 - *Shared Folders > Sample Lite > Published Reporting > Data Models > Salary Report Data Model.*



4. Click **Next**.

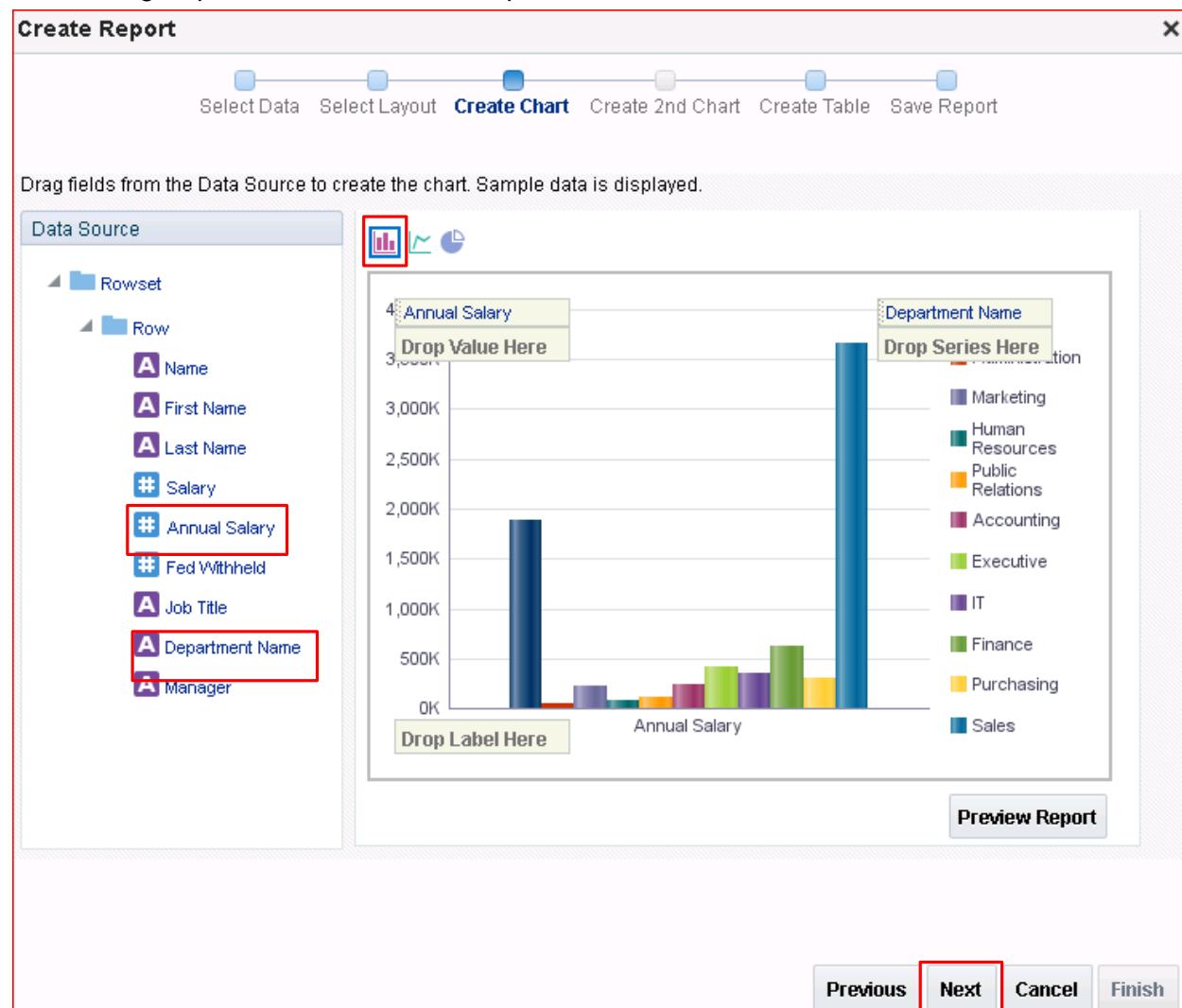
5. In the layout selection step, select:

- Portrait
- Page Header
- Chart and Table



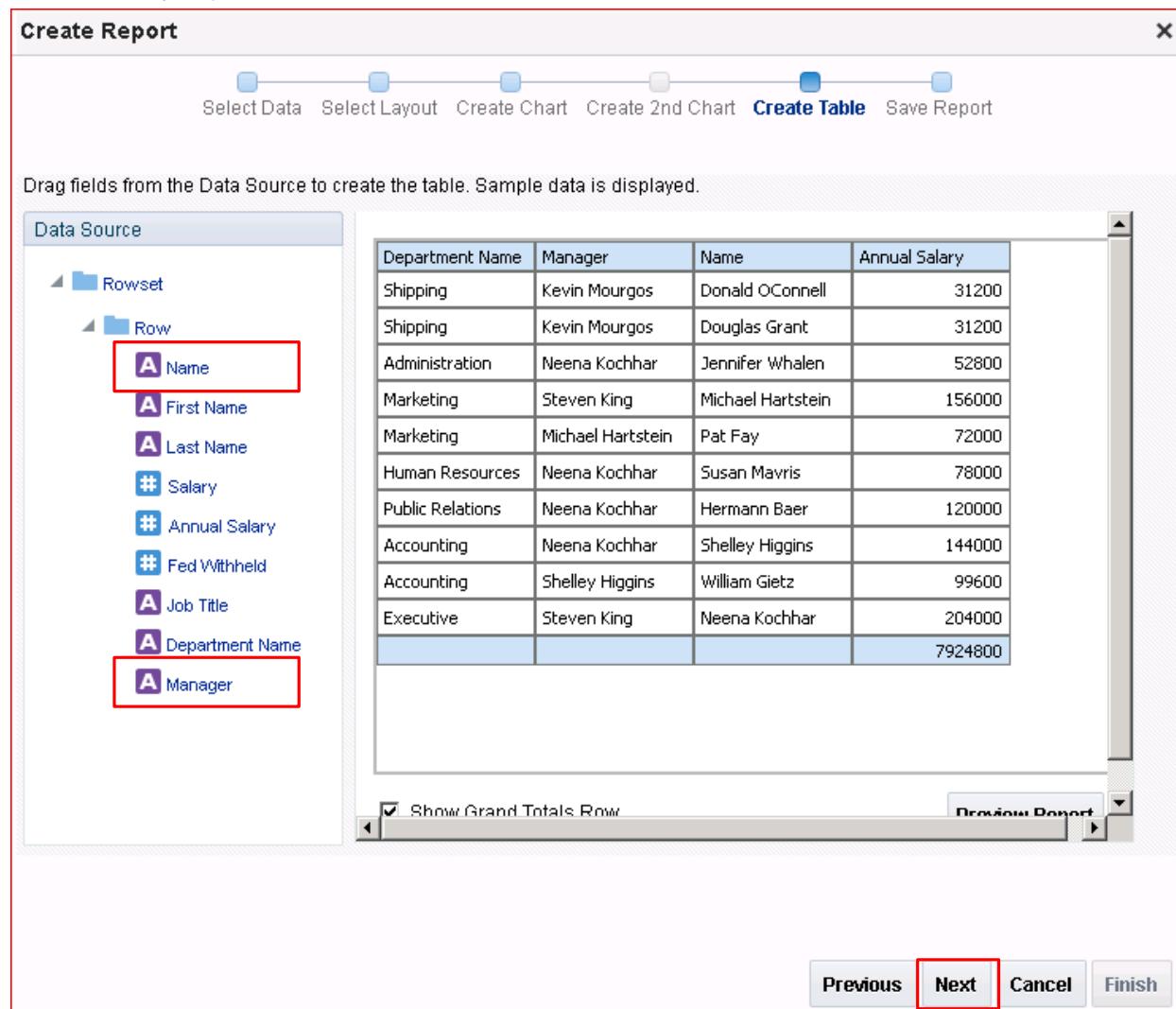
6. Click **Next**. The layout that you select on the Select Layout page drives the remaining pages that you must complete in order to create the report.
7. Because you have selected Chart and Table layout, the Create Chart page opens. Select **Bar Chart**.

8. Add columns to the chart by dragging them from the Data Source pane to the chart area.
 - a. Drag Annual Salary on to Drop Value Here.
 - b. Drag Department Name on to Drop Series Here.



9. Click **Next**. The Create Table page is displayed with the columns that you previously selected for the chart. You will edit this table by appending the required columns.

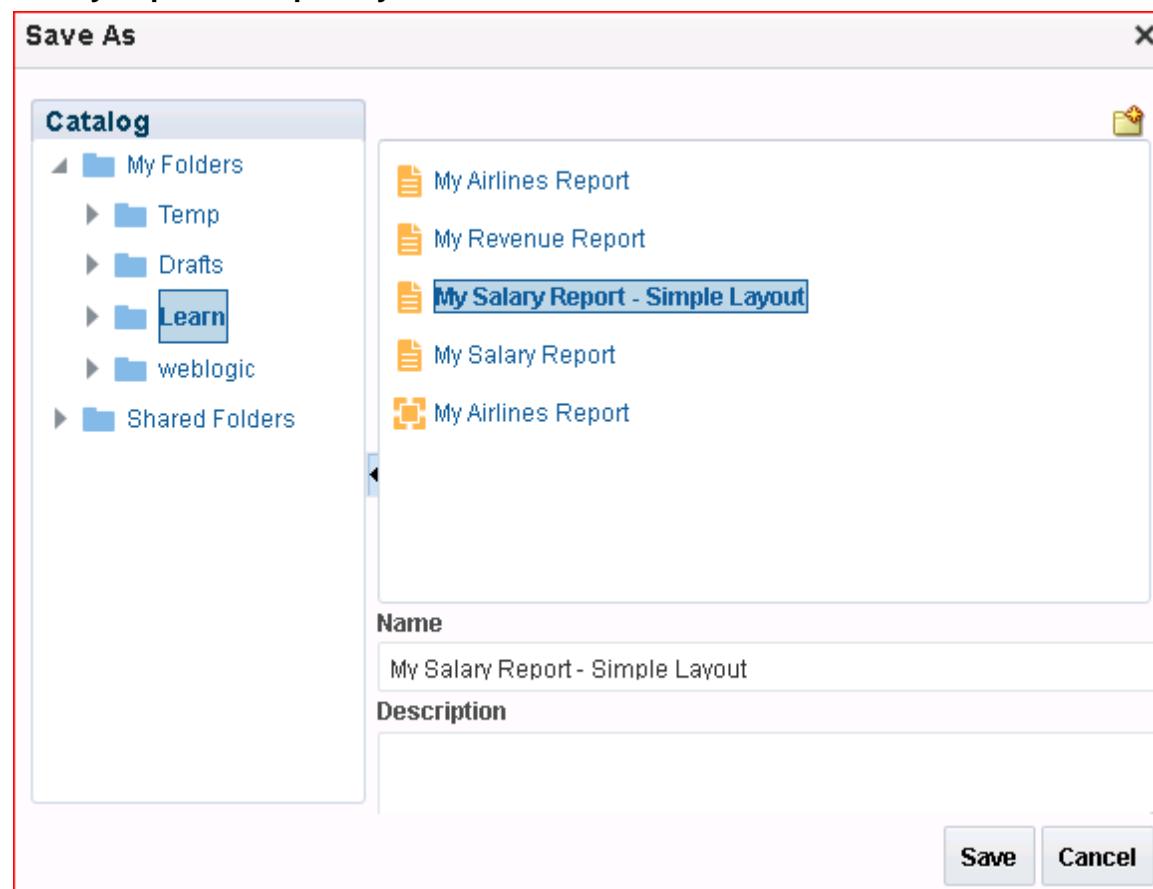
10. Along with the existing columns, add Manager and Name by dragging the data elements to the table. The columns are displayed in a simple tabular format and the column widths are automatically adjusted based on the number of selected columns.



11. Click **Next** in the Report Wizard to proceed to saving the report. You can edit the table with more formatting in Layout Editor after saving the report.
 12. Click **Customize Report Layout** and then click **Finish**. The final page prompts you to save the report.

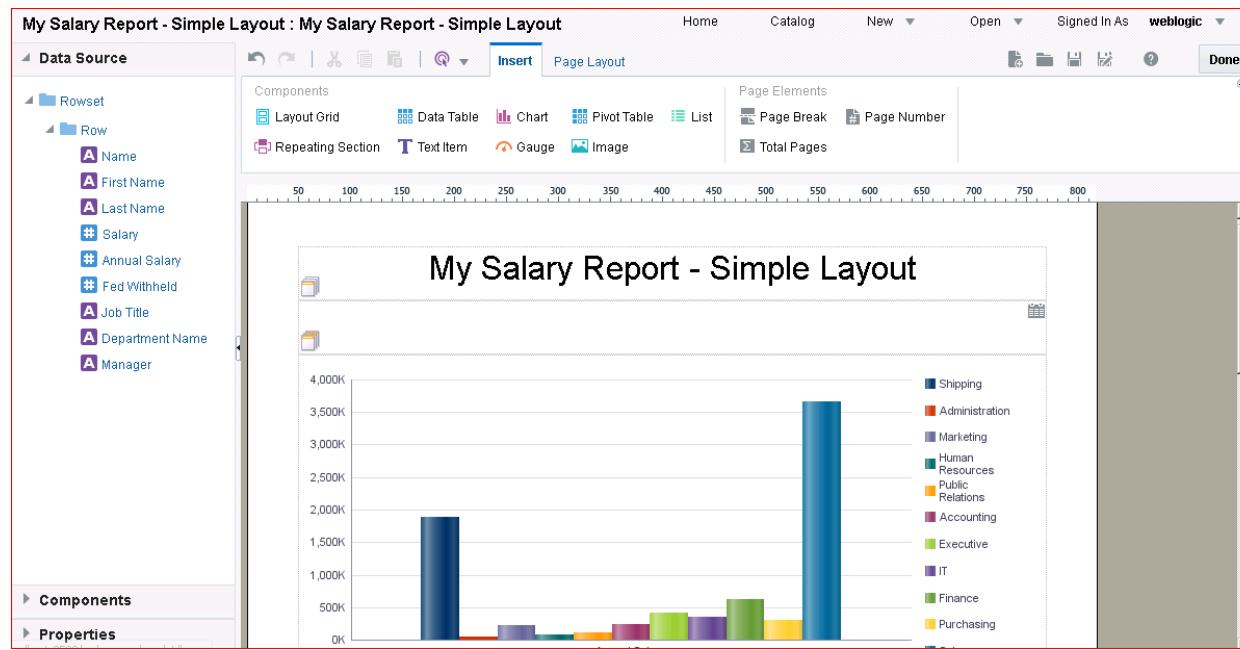
Note: Because you selected the Customize Report Layout option, after saving the report, it is opened in Layout Editor for further editing. In addition, the Learn folder is available again.

13. In the Save As dialog box, select the folder My Folders > Learn. Name the report **My Salary Report – Simple Layout**.



14. The report is opened in Layout Editor for you to further customize it. Observe the various sections—Data Source, Components, and Properties—that enable you to create a pixel-perfect layout.

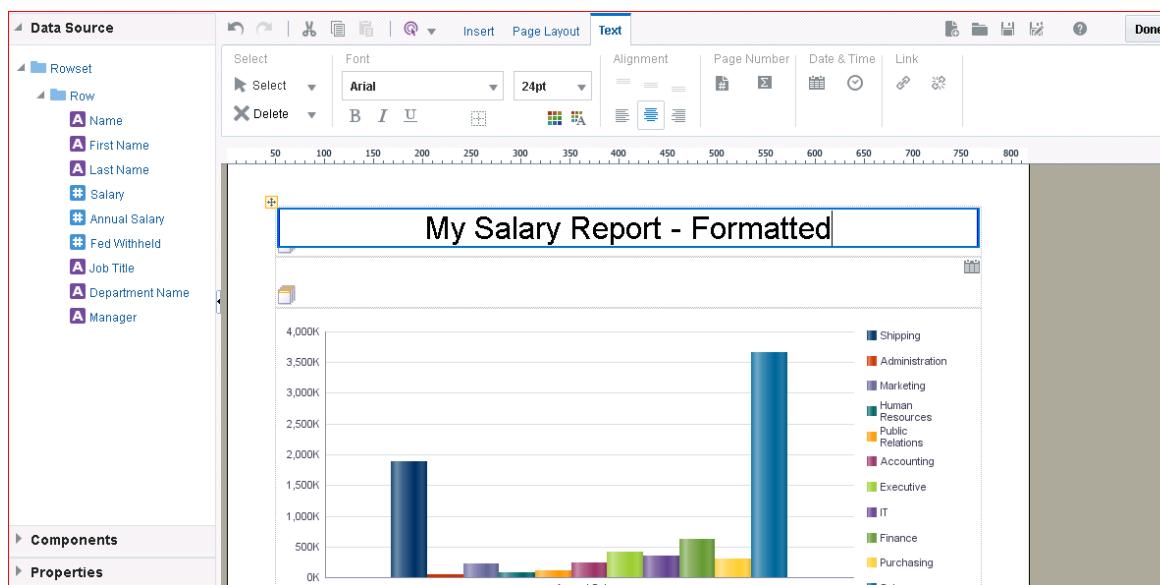
Data Source displays the data available, because this is a predefined layout with a chart and table structure in place.



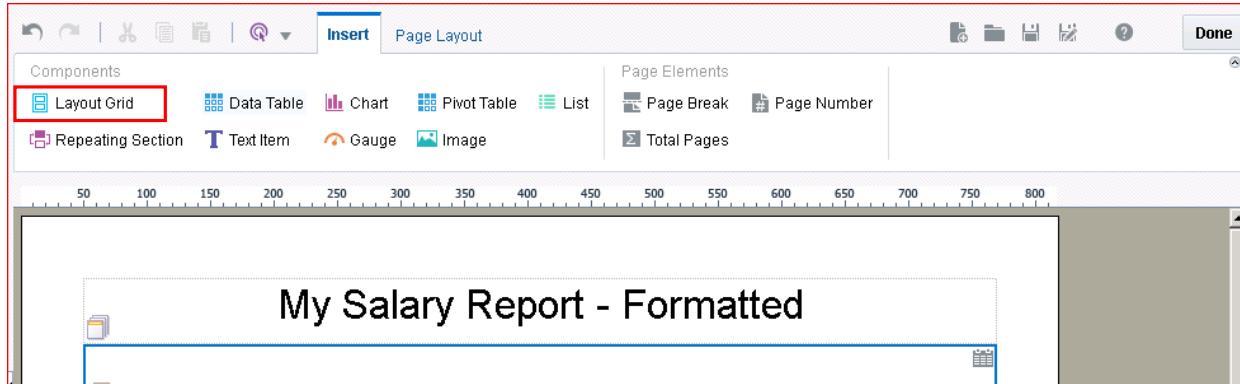
By default, the report name is displayed as the layout name.

15. To edit the title of the report, do the following:

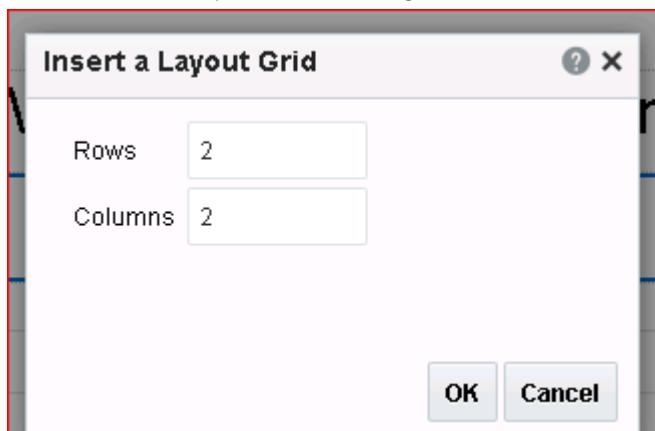
- Select the existing report title. The Text options are highlighted.
- Edit the text for the title to change it to My Salary Report – Formatted.
- Edit the Title font format as well.



16. Insert a grid below the title. Select the title grid and click **Insert > Layout Grid**.

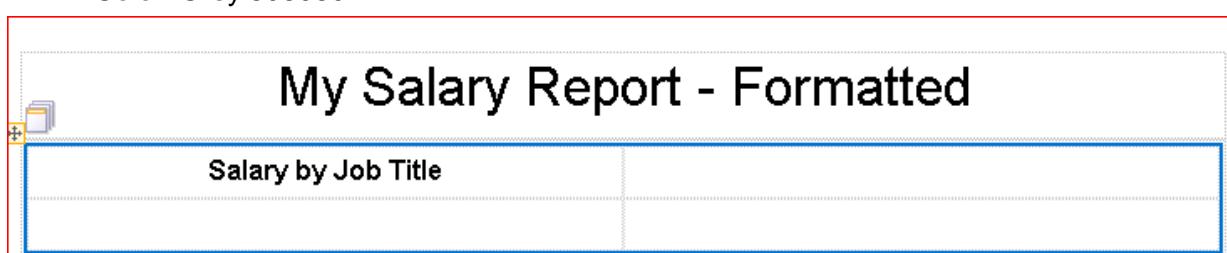


17. In the Insert a Layout Grid dialog box, select 2 rows and 2 columns, and then click OK.



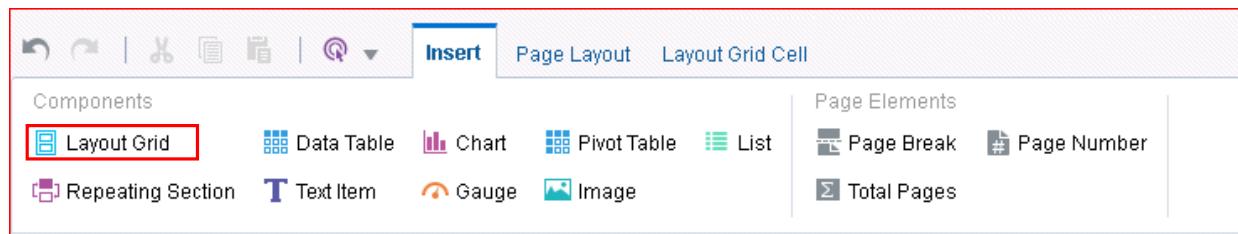
18. Select the top row, and insert a Text Item. Enter **Salary by Job Title** and format the text as:

- Font: Tahoma
- Size:12
- Type: Bold
- Color: Grey 808080

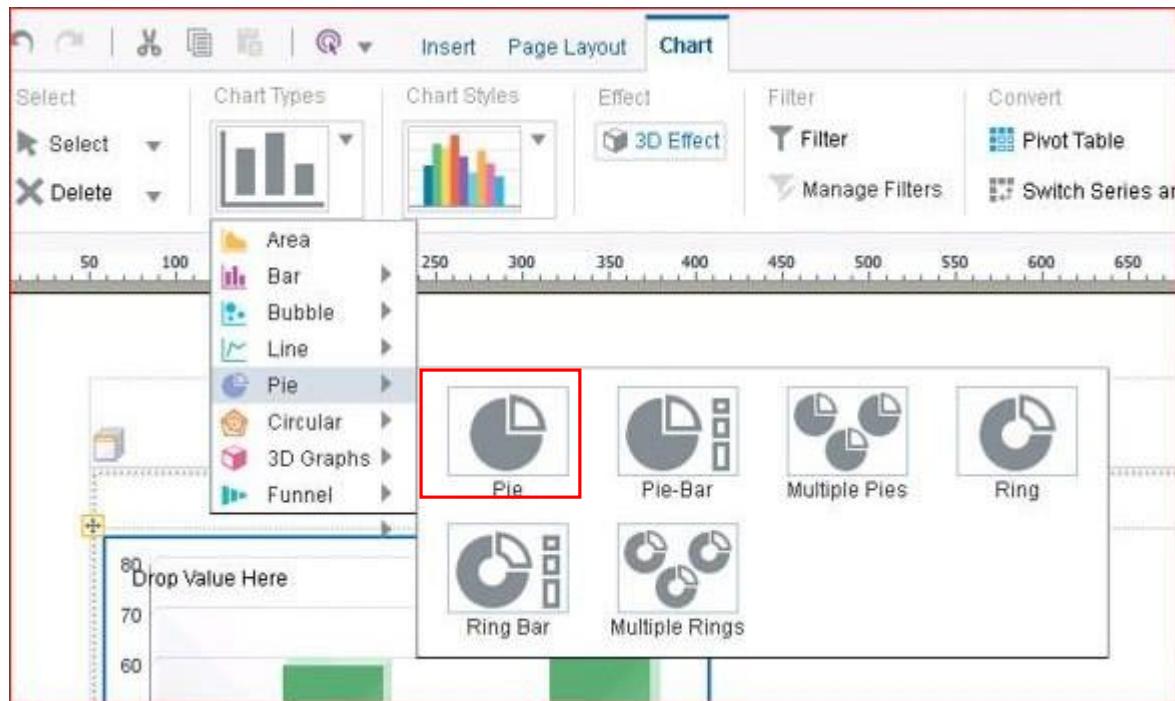


19. Add a new pie chart to this report.

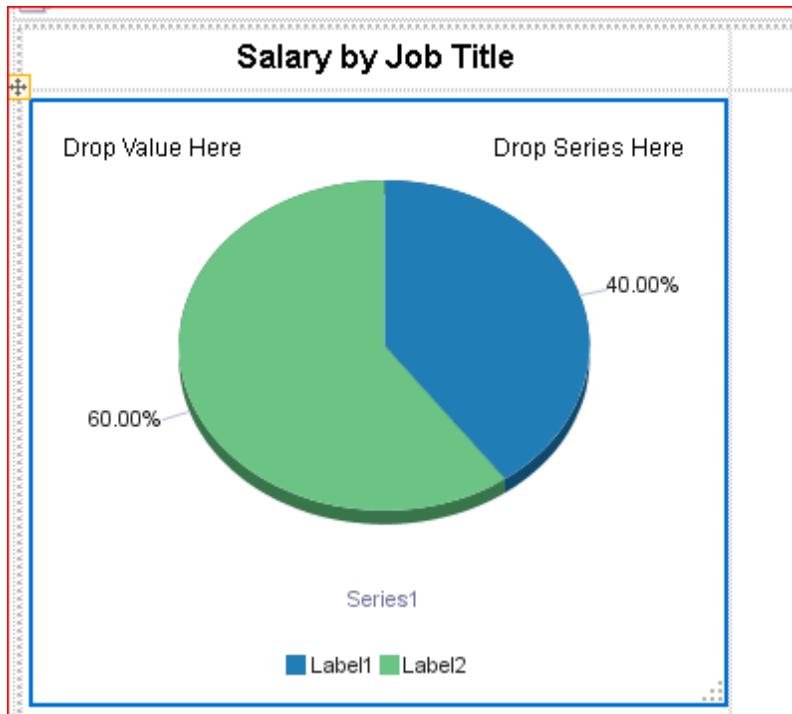
Select the next row in the same column and insert a chart item.



20. Select Chart Types: Pie > Pie to select a pie chart.

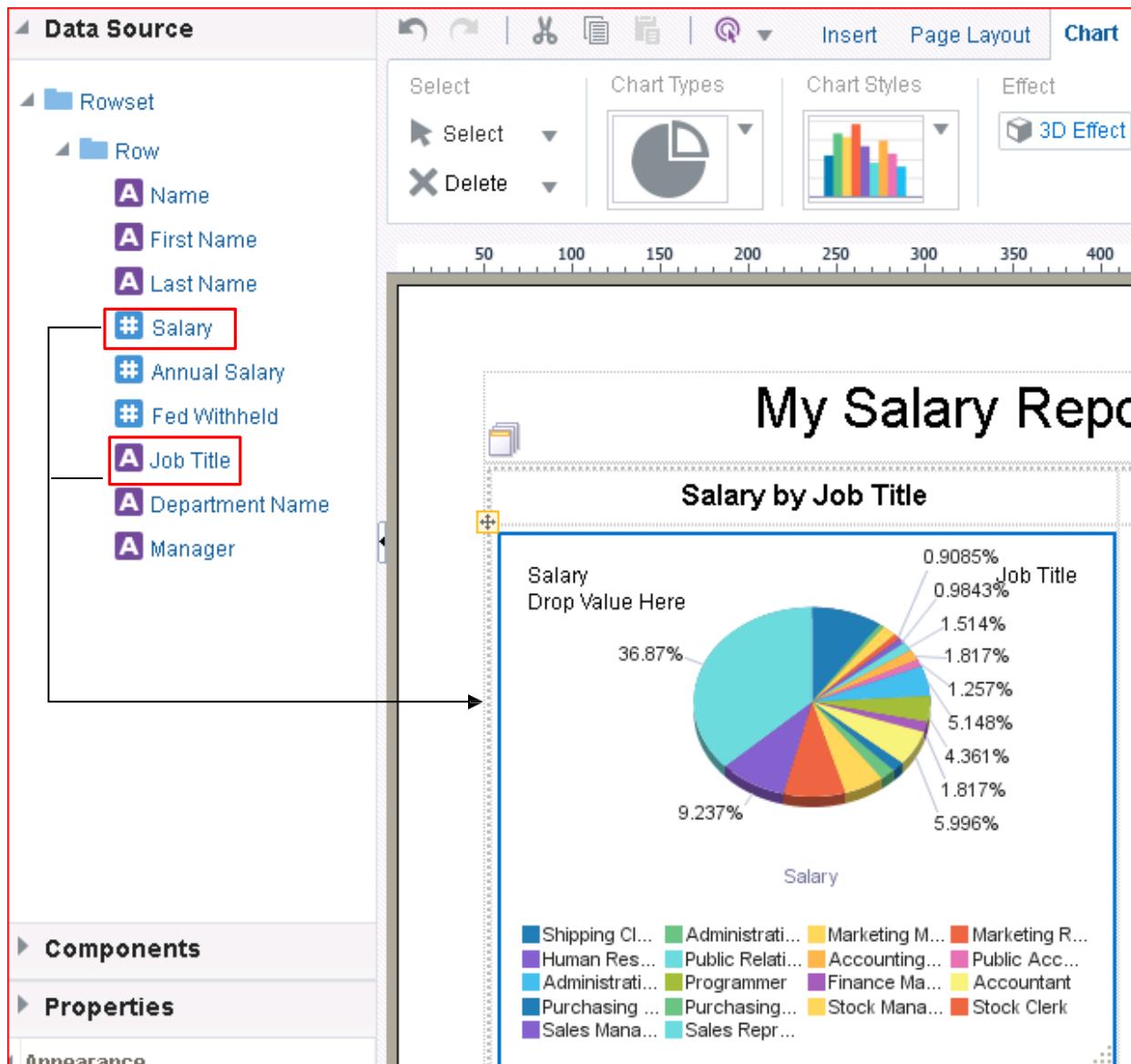


A chart is inserted in the row.



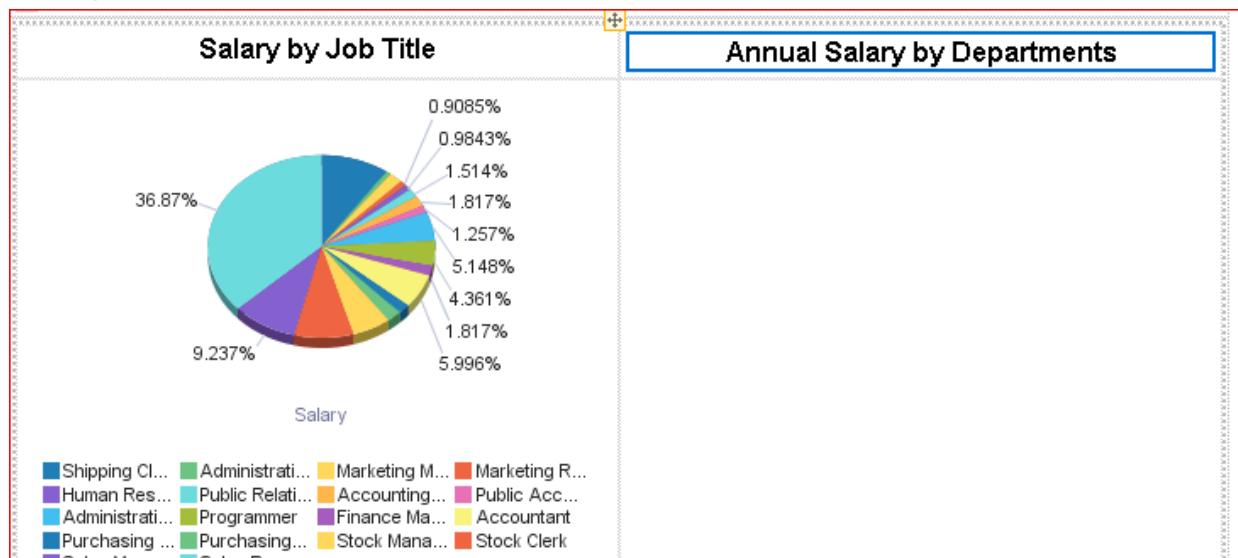
21. Add the data elements from the Data Source pane to the pie chart.
a. Drag Salary to Drop Value Here.

- b. Drag Job Title to Drop Series Here.



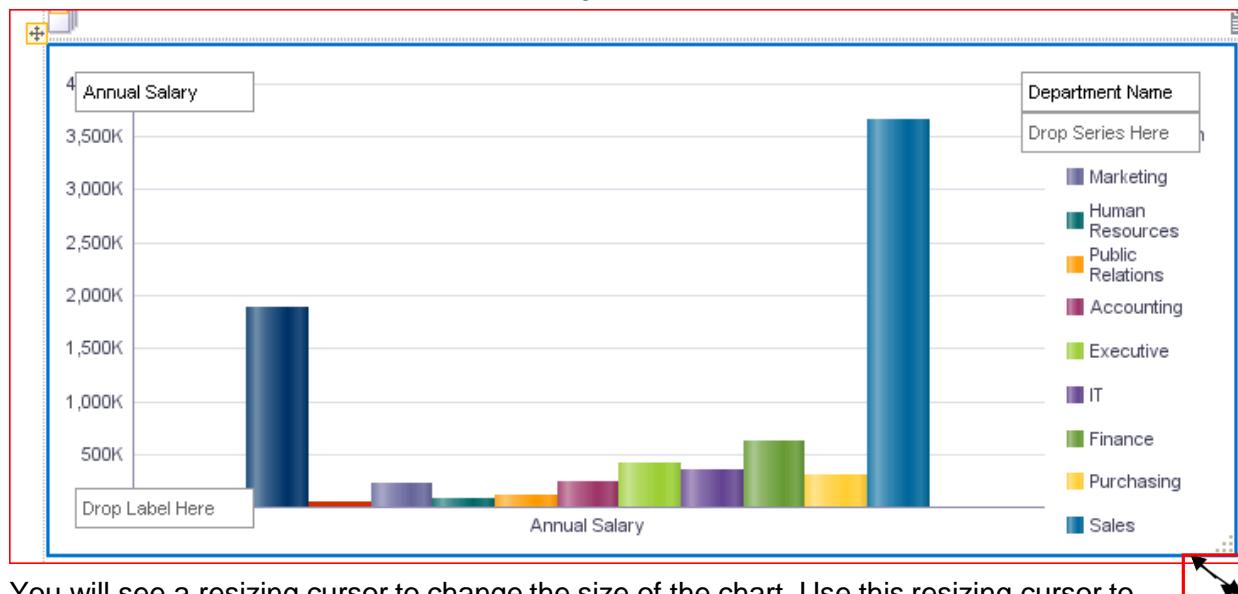
The pie chart displaying the salary for various job titles is displayed.

22. Move the existing bar chart that was created with the Report Wizard to the column next to the pie chart. Add the title Annual Salary by Departments to the column and format it similar to the pie chart title.



Note: You cannot add the existing bar chart to this column with its current size. The chart has to fit in a thin column.

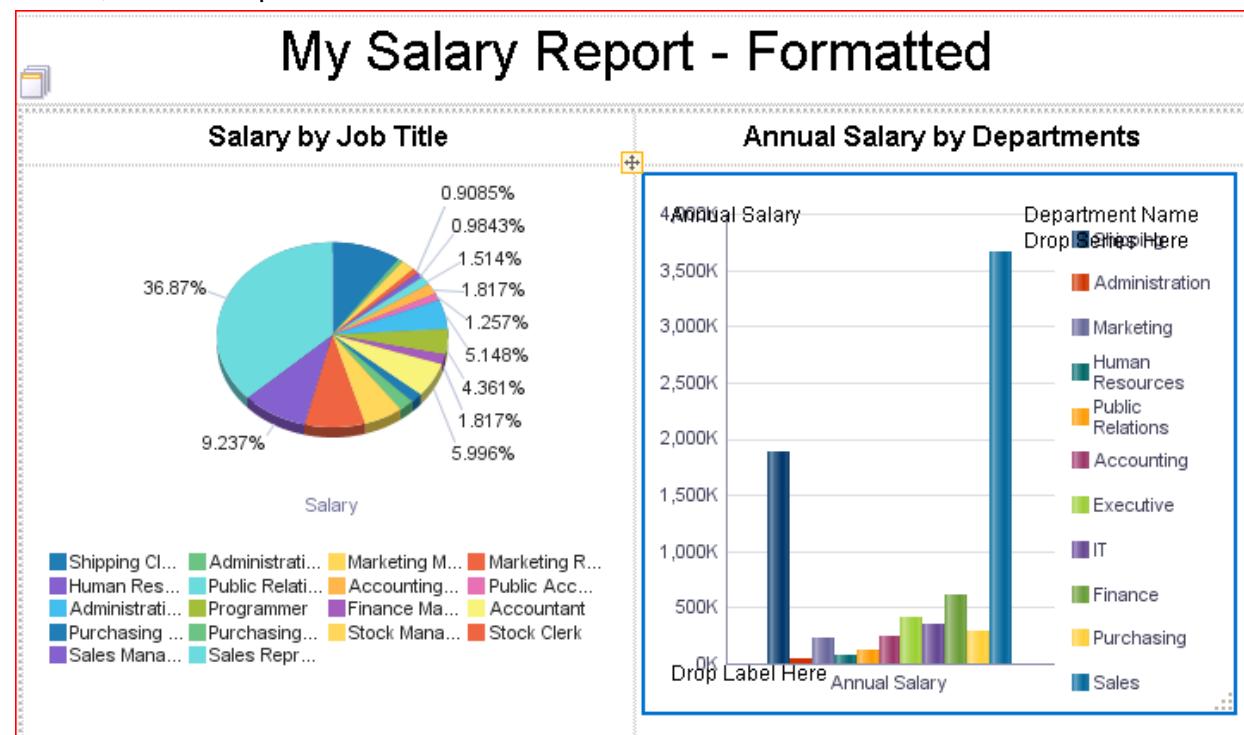
23. Select the bar chart as shown in the following screenshot:



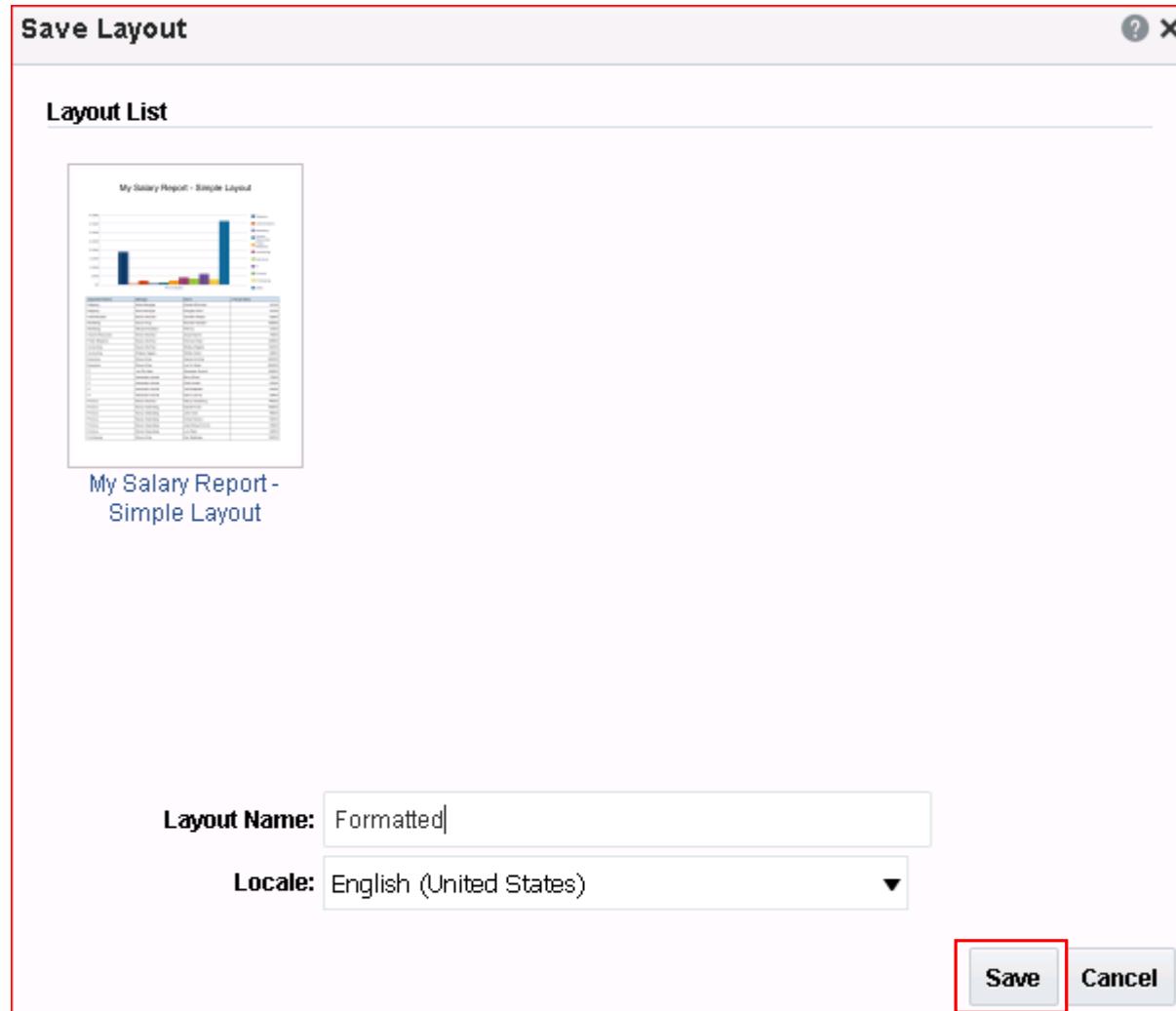
The resized chart is refreshed and displayed.



24. Select the chart. You will see a movement cursor on the chart. Drag the chart to the column above, next to the pie chart.



25. Click the Save As Icon to save the layout as **Formatted**.



You can see the list of layouts for the report. The current list has the default layout that you were editing until now.

26. Click Save to save and return to Layout Editor.

Practice 6-2: Editing the Table

Overview

In this practice, you edit the existing data table created from the Report Wizard to enhance it.

Assumptions

You successfully saved the report layout from Practice 5-1 as Formatted. The same layout is opened for editing now.

Tasks

1. Edit the existing data table and format the data. Resize the column width to add more columns to the table.

Department Name	Manager	Name	Annual Salary
Shipping	Kevin Murgos	Donald O'Connell	31200
Shipping	Kevin Murgos	Douglas Grant	31200
Administration	Neena Kochhar	Jennifer Whalen	52800
Marketing	Steven King	Michael Hartstein	156000
Marketing	Michael Hartstein	Pat Fay	72000
Human Resources	Neena Kochhar	Susan Mavris	78000
Public Relations	Neena Kochhar	Hermann Baer	120000
Accounting	Neena Kochhar	Shelley Higgins	144000
Accounting	Shelley Higgins	William Gietz	99600
Executive	Steven King	Neena Kochhar	204000
			7924800

- a. To do this, place your cursor between two columns. The column indicator turns blue, and sizing handles appear.
- b. Drag the column indicators for **Department Name**, **Manager**, **Name**, and **Annual Salary** to the left, reducing some of the column space.

2. Add another data element Job Title from the data source pane between the Manager and Name columns.

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Kevin Mourgos	Shipping Clerk	Donald O'Connell	31200
Shipping	Kevin Mourgos	Shipping Clerk	Douglas Grant	31200
Administration	Neena Kochhar	Administration Assistant	Jennifer Whalen	52800
Marketing	Steven King	Marketing Manager	Michael Hartstein	156000
Marketing	Michael Hartstein	Marketing Representative	Pat Fay	72000
Human Resources	Neena Kochhar	Human Resources Representative	Susan Mavris	78000
Public Relations	Neena Kochhar	Public Relations Representative	Hermann Baer	120000
Accounting	Neena Kochhar	Accounting Manager	Shelley Higgins	144000
Accounting	Shelley Higgins	Public Accountant	William Gietz	99600
Executive	Steven King	Administration Vice President	Neena Kochhar	204000
				7924800

3. Format the Annual Salary column. Click any data value cell for the **Annual Salary** column. This selects the entire column. Click the **Column** tab and from the Data Formatting dropdown list, select **(\$1,234.57) (Currency)**.

Formatting is applied to the column:

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Kevin Mourgos	Shipping Clerk	Donald O'Connell	\$31,200.00
Shipping	Kevin Mourgos	Shipping Clerk	Douglas Grant	\$31,200.00
Administration	Neena Kochhar	Administration Assistant	Jennifer Whalen	\$52,800.00
Marketing	Steven King	Marketing Manager	Michael Hartstein	\$156,000.00
Marketing	Michael Hartstein	Marketing Representative	Pat Fay	\$72,000.00
Human Resources	Neena Kochhar	Human Resources Representative	Susan Mavris	\$78,000.00
Public Relations	Neena Kochhar	Public Relations Representative	Hermann Baer	\$120,000.00
Accounting	Neena Kochhar	Accounting Manager	Shelley Higgins	\$144,000.00
Accounting	Shelley Higgins	Public Accountant	William Gietz	\$99,600.00
Executive	Steven King	Administration Vice President	Neena Kochhar	\$204,000.00
				\$792,480.00

4. Change the sort order for Annual Salary to ascending. Keep the Annual Salary column selected.

Click the **Ascending Order** icon as indicated in the following screenshot:

The screenshot shows the Microsoft Word ribbon with the 'Column' tab selected. In the ribbon toolbar, there is a 'Sort' button with an upward arrow icon, which is highlighted with a red box. Below the ribbon, a table is displayed with columns for Job Title, Name, and Annual Salary. The 'Annual Salary' column is highlighted with a red box. The data in the table is as follows:

Job Title	Name	Annual Salary
Shipping Clerk	Donald O'Connell	\$31,200.00
Shipping Clerk	Douglas Grant	\$31,200.00
Administration Assistant	Jennifer Whalen	\$52,800.00
Marketing Manager	Michael Hartstein	\$156,000.00
Marketing Representative	Pat Fay	\$72,000.00
Human Resources Representative	Susan Mavris	\$78,000.00
Public Relations Representative	Hermann Baer	\$120,000.00
Accounting Manager	Shelley Higgins	\$144,000.00
Public Accountant	William Gietz	\$99,600.00
Administration Vice President	Neena Kochhar	\$204,000.00
		\$7,924,800.00

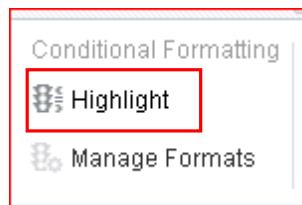
The column re-sorts in ascending order.

The screenshot shows the same table after sorting the 'Annual Salary' column in ascending order. The data is now arranged as follows:

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
Shipping	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
Shipping	Payam Kaufling	Stock Clerk	Hazel Philtanker	\$26,400.00
Shipping	Matthew Weiss	Stock Clerk	James Landry	\$28,800.00
Shipping	Payam Kaufling	Stock Clerk	Ki Gee	\$28,800.00
Purchasing	Den Raphaely	Purchasing Clerk	Karen Colmenares	\$30,000.00
Shipping	Adam Fripp	Stock Clerk	James Marlow	\$30,000.00
Shipping	Shanta Vollman	Stock Clerk	Joshua Patel	\$30,000.00
Shipping	Kevin Mourgos	Stock Clerk	Peter Vargas	\$30,000.00
Shipping	Matthew Weiss	Shipping Clerk	Martha Sullivan	\$30,000.00
				\$7,924,800.00

5. Add conditional formatting to the Annual Salary column. Conditional formats allow you to highlight data fields based on a condition.

With the Annual Salary column still selected, click **Conditional Formatting > Highlight** on the Column tab.

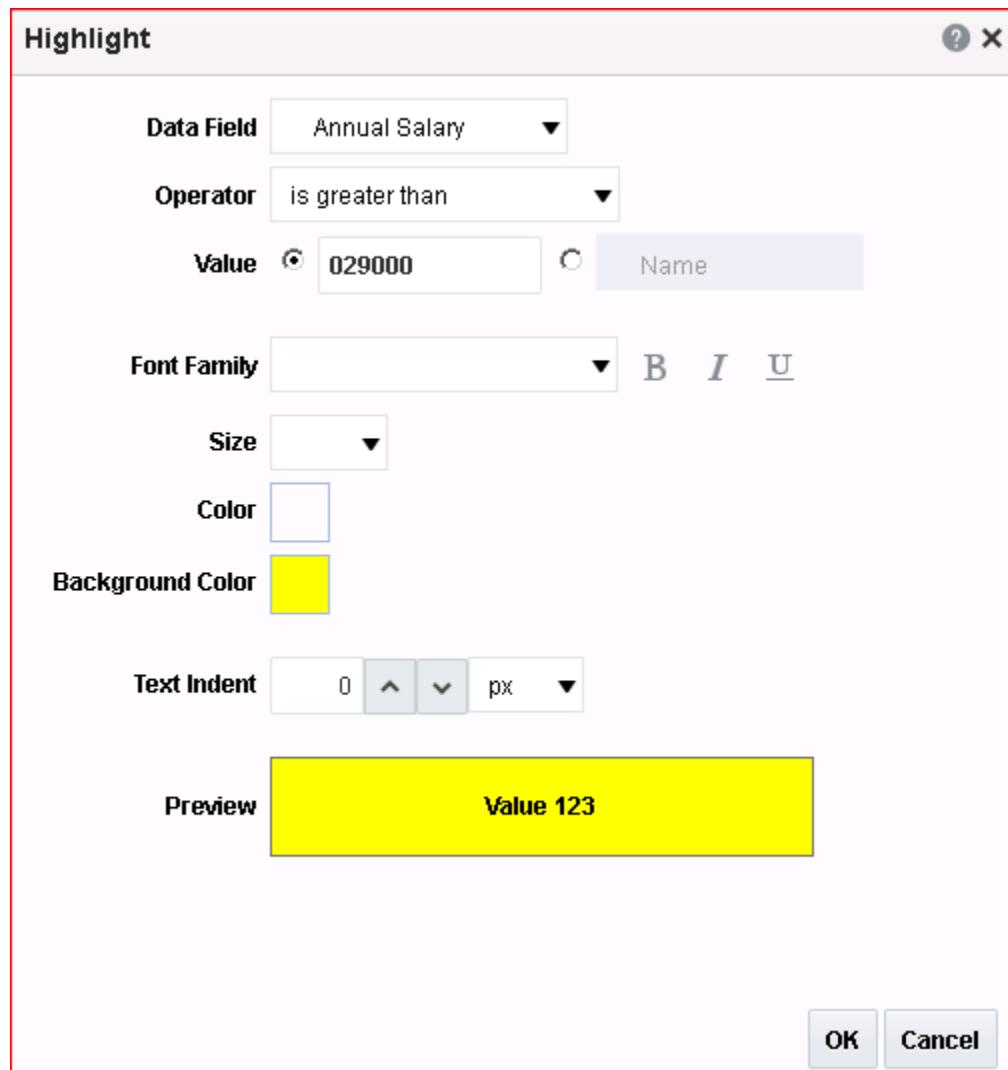


The Highlight dialog box appears.

6. In the Highlight dialog box, enter the following attributes:

Step	Attribute	Choices or Values
a.	Operator	is greater than or equal to
b.	Value	29000
c.	Background Color	Bright Yellow (ffff00)

The Highlight dialog box should look like this:



Click **OK** in the Color Picker and then click **OK** again.

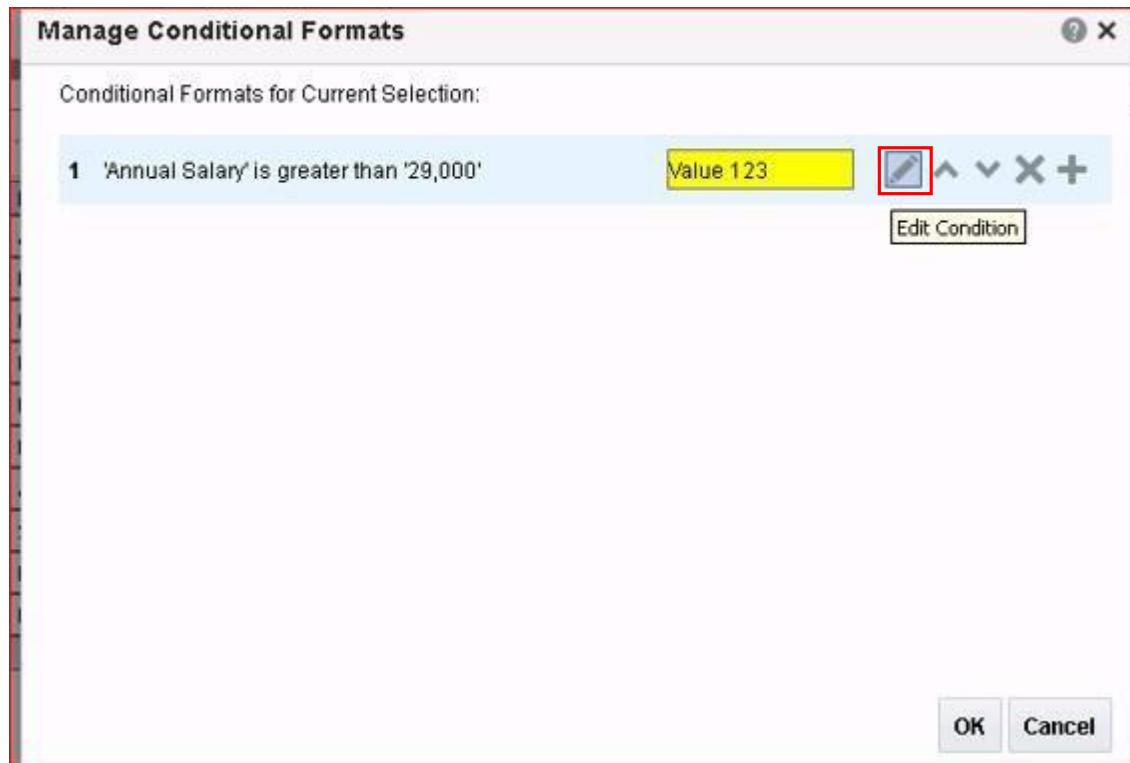
7. Notice that Manage Formats now appears in the Conditional Formatting section.

The screenshot shows the Excel ribbon with the 'Conditional Formatting' tab selected. The 'Manage Formats' button is highlighted with a red box. Below the ribbon, a table of employee names and annual salaries is displayed. A red arrow points from the 'Manage Formats' button in the ribbon to the yellow-highlighted row for Karen Colmenares in the table.

Name	Annual Salary
TJ Olson	\$25,200.00
Steven Markle	\$26,400.00
Hazel Philtanker	\$26,400.00
James Landry	\$28,800.00
Ki Gee	\$28,800.00
Karen Colmenares	\$30,000.00
James Marlow	\$30,000.00
Joshua Patel	\$30,000.00
Peter Vargas	\$30,000.00
Martha Sullivan	\$30,000.00
	\$7,924,800.00

This allows you to edit the existing conditional formats. Click **Manage Formats**.

8. In the Manage Conditional Formats dialog box, click the Edit Condition icon and change the highlight color to green.



In the Highlight dialog box, change the highlight color and click OK. The edited condition will look like this.



Click OK to return to Layout Editor. The table highlights the rows with the set condition in green.

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
Shipping	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
Shipping	Payam Kaufling	Stock Clerk	Hazel Philtanker	\$26,400.00
Shipping	Matthew Weiss	Stock Clerk	James Landry	\$28,800.00
Shipping	Payam Kaufling	Stock Clerk	Ki Gee	\$28,800.00
Purchasing	Den Raphaely	Purchasing Clerk	Karen Colmenares	\$30,000.00
Shipping	Adam Fripp	Stock Clerk	James Marlow	\$30,000.00
Shipping	Shanta Vollman	Stock Clerk	Joshua Patel	\$30,000.00
Shipping	Kevin Mourgos	Stock Clerk	Peter Vargas	\$30,000.00
Shipping	Matthew Weiss	Shipping Clerk	Martha Sullivan	\$30,000.00
				\$7,924,800.00

9. Similarly add another condition on Annual Salary as follows:

Step	Attribute	Choices or Values
a.	Operator	is less than
b.	Value	26000
c.	Background Color	Red

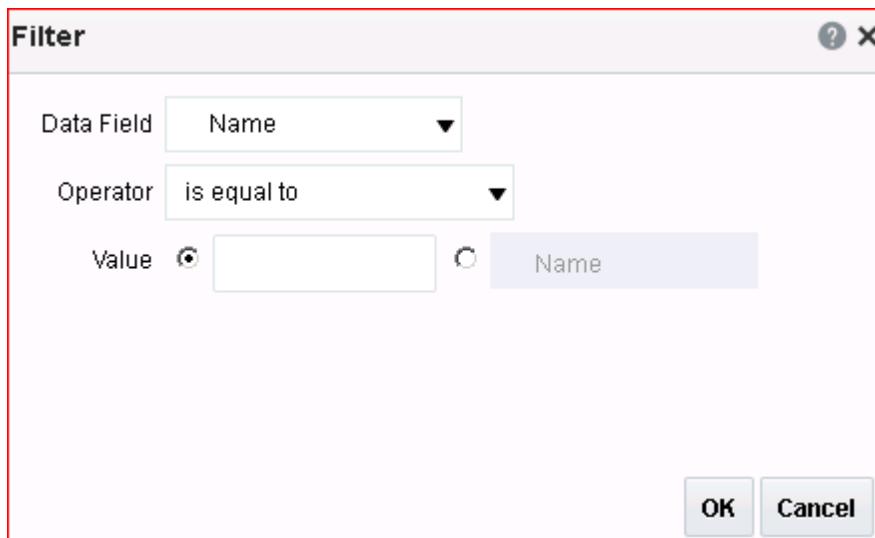
The table now looks like this:

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
Shipping	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
Shipping	Payam Kaufling	Stock Clerk	Hazel Philtanker	\$26,400.00
Shipping	Matthew Weiss	Stock Clerk	James Landry	\$28,800.00
Shipping	Payam Kaufling	Stock Clerk	Ki Gee	\$28,800.00
Purchasing	Den Raphaely	Purchasing Clerk	Karen Colmenares	\$30,000.00
Shipping	Adam Fripp	Stock Clerk	James Marlow	\$30,000.00
Shipping	Shanta Vollman	Stock Clerk	Joshua Patel	\$30,000.00
Shipping	Kevin Mourgos	Stock Clerk	Peter Vargas	\$30,000.00
Shipping	Matthew Weiss	Shipping Clerk	Martha Sullivan	\$30,000.00
				\$7,924,800.00

Add a filter to this table. Select the table as shown in the image. Click **Select > Table**.

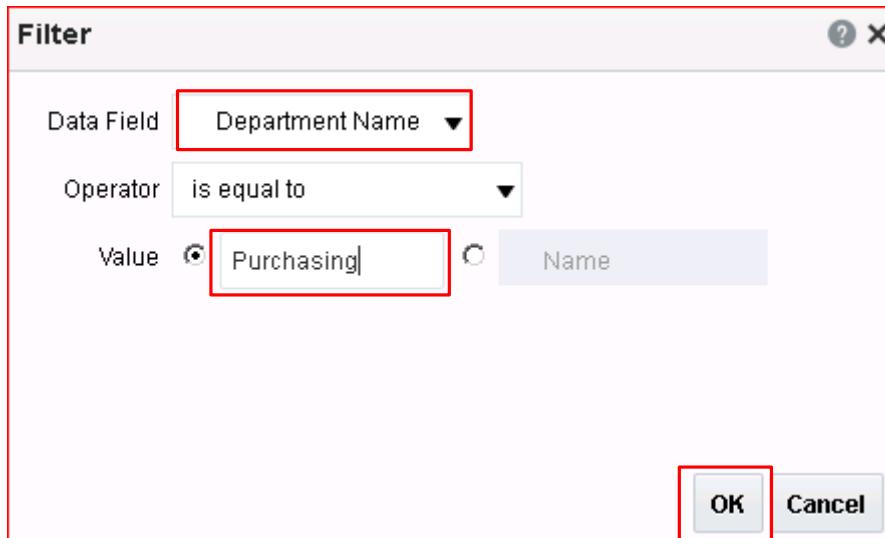
Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
Shipping	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
Shipping	Payam Kaufling	Stock Clerk	Hazel Philtanker	\$26,400.00
Shipping	Matthew Weiss	Stock Clerk	James Landry	\$28,800.00
Shipping	Payam Kaufling	Stock Clerk	Ki Gee	\$28,800.00
Purchasing	Den Raphaely	Purchasing Clerk	Karen Colmenares	\$30,000.00
Shipping	Adam Fripp	Stock Clerk	James Marlow	\$30,000.00
Shipping	Shanta Vollman	Stock Clerk	Joshua Patel	\$30,000.00
Shipping	Kevin Mourgos	Stock Clerk	Peter Vargas	\$30,000.00
Shipping	Matthew Weiss	Shipping Clerk	Martha Sullivan	\$30,000.00
				\$7,924,800.00

10. When you select the table, all the table elements are available for editing. Select Filter. The Filter dialog box appears:



In the Filter dialog box, change or enter the following attributes:

Step	Attribute	Choices or Values
a.	Data Field	Department Name
b.	Operator	is equal to
c.	Value	Purchasing



Note: All elements are available for selection from the Data Field drop-down list.

Click **OK**. The table should look like this:

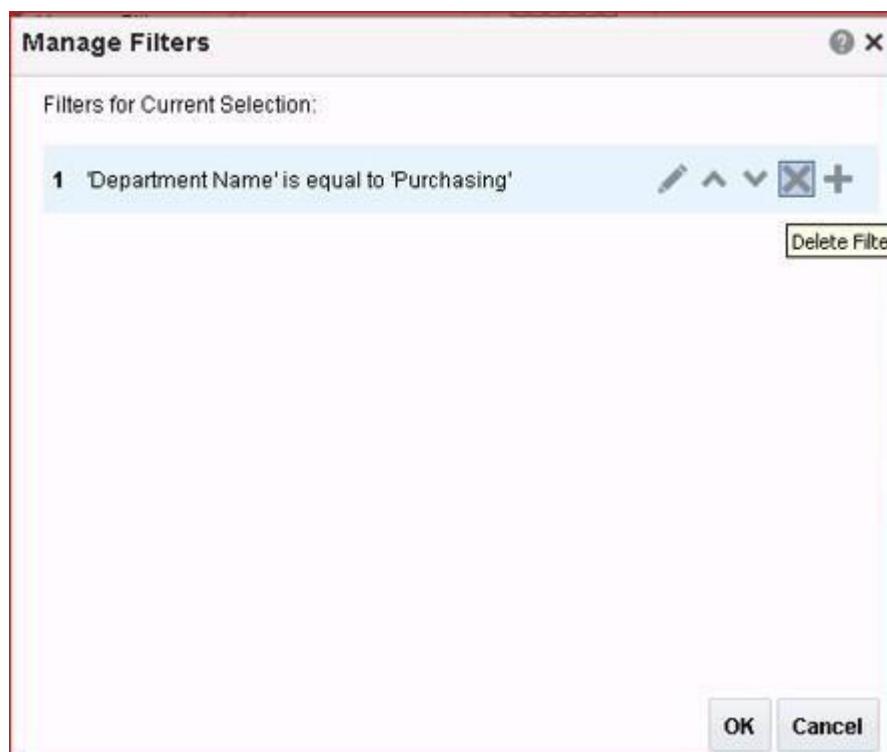
Department Name	Manager	Job Title	Name	Annual Salary
Purchasing	Den Raphaely	Purchasing Clerk	Karen Colmenares	\$30,000.00
Purchasing	Den Raphaely	Purchasing Clerk	Guy Himuro	\$31,200.00
Purchasing	Den Raphaely	Purchasing Clerk	Sigal Tobias	\$33,600.00
Purchasing	Den Raphaely	Purchasing Clerk	Shelli Baida	\$34,800.00
Purchasing	Den Raphaely	Purchasing Clerk	Alexander Khoo	\$37,200.00
Purchasing	Steven King	Purchasing Manager	Den Raphaely	\$132,000.00
				\$298,800.00

Observe that the Manage Filters option is enabled after you added a filter.

11. Remove the Department filter from your report layout.

Click **Manage Filters** in the Filter section. The Manage Filters dialog box appears.

12. In the Manage Filters dialog box, click the **Delete** icon and click **OK**.



13. All values reappear in the data table with the applied conditional format as earlier. Click **Save**.

Practice 6-3: Adding Repeating Sections

Overview

In this practice, you add repeating sections to the table from the previous practice.

Repeating sections are used to create classic banded reports, as well as repeating pages or sections for different data elements, such as Group Above/Outline.

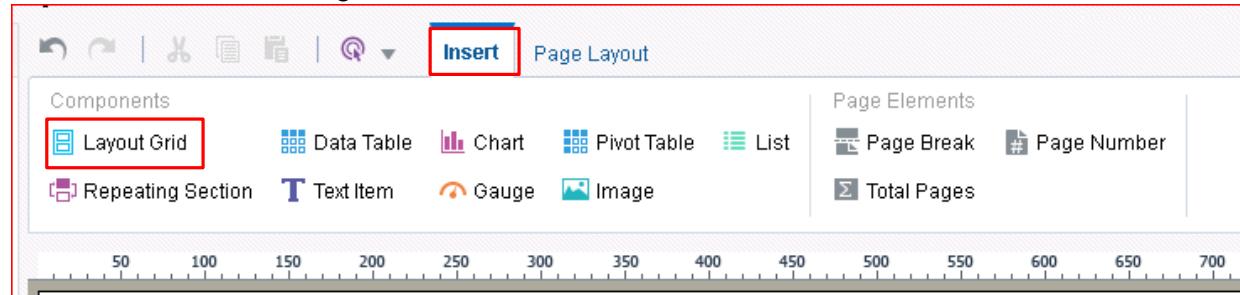
Repeating sections repeat the components within the section of the layout based on the occurrence of an element in the data.

Assumptions

You successfully saved the report layout from the previous practice as Formatted. The same layout is opened for editing now.

Tasks

1. In Layout Editor, select the next grid below the table and click **Insert > Layout Grid**.
Insert two rows with a single column.



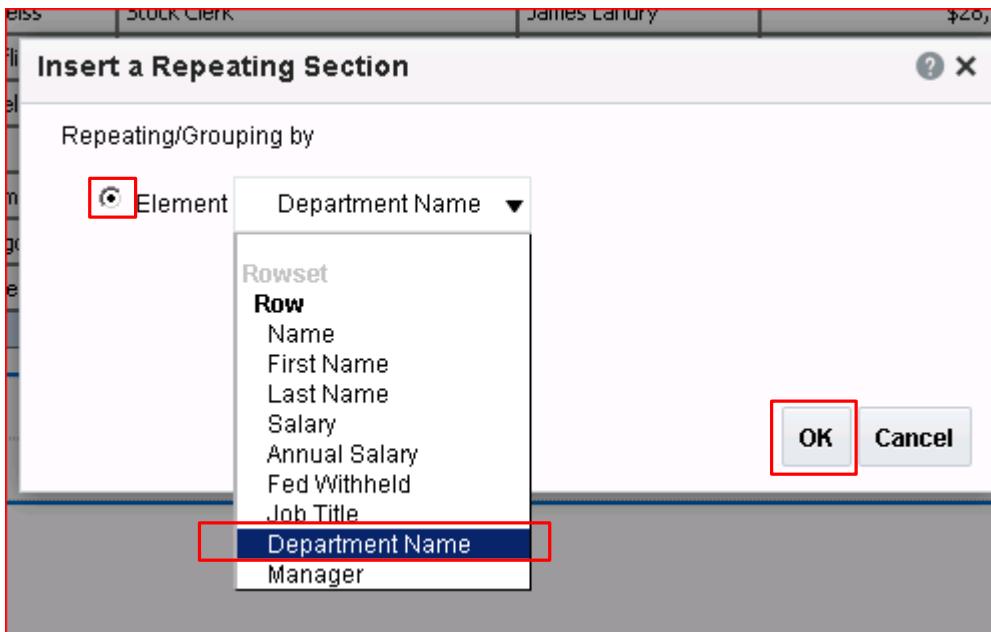
2. Provide a title for this table by inserting a text item in the first row of the layout grid.
Enter **Salary Details** and format the title.

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
Shipping	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
Shipping	Payam Kaufling	Stock Clerk	Hazel Philtanker	\$26,400.00
Shipping	Matthew Weiss	Stock Clerk	James Landry	\$28,800.00
Shipping	Payam Kaufling	Stock Clerk	Ki Gee	\$28,800.00
Purchasing	Den Raphaely	Purchasing Clerk	Karen Colmenares	\$30,000.00
Shipping	Adam Fripp	Stock Clerk	James Marlow	\$30,000.00
Shipping	Shanta Vollman	Stock Clerk	Joshua Patel	\$30,000.00
Shipping	Kevin Mourgos	Stock Clerk	Peter Vargas	\$30,000.00
Shipping	Matthew Weiss	Shipping Clerk	Martha Sullivan	\$30,000.00
				\$7,924,800.00
Salary Details				

3. Select the second row of the layout grid, click the **Insert** tab, and select **Repeating Section**.

The screenshot shows the Microsoft Power BI Layout Editor interface. The top navigation bar includes 'Layout', 'Format', 'Insert' (which is selected), 'Page Layout', and 'Layout Grid'. The 'Components' pane on the left lists various options: Layout Grid, Data Table, Chart, Pivot Table, List, Repeating Section (which is highlighted with a red box), Text Item, Gauge, and Image. The 'Page Elements' pane on the right lists Page Break, Page Number, Total Pages, and Sales. Below the components is a timeline with markers for Purchasing, Sales, and Marketing. The main workspace contains a table with the same data as the previous screenshot, and a repeating section labeled 'Salary Details' is visible at the bottom, also highlighted with a red box.

4. The “Insert a Repeating Section” dialog box appears.



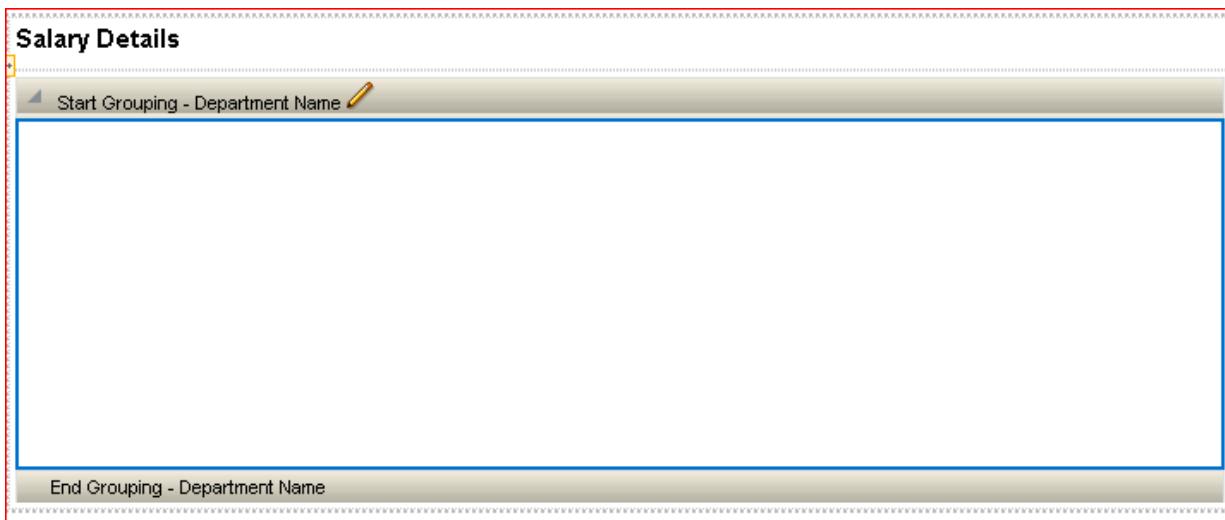
The Element option allows you to specify the data item that repeats for each group.

You use Group Detail when you have nested groups, such as “state within country for the United States.”

Select **Department Name** from the Element drop-down list and click **OK**.

The repeating section area appears in the design area.

5. The layout should look like this:



Drag the previously edited data table to this area.

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
Shipping	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
Shipping	Payam Kaufling	Stock Clerk	Hazel Philanthropist	\$26,400.00
Shipping	Matthew Weiss	Stock Clerk	James Landry	\$28,600.00
Shipping	Payam Kaufling	Stock Clerk	Ki Geisler	\$28,800.00
Purchasing	Den Raphaely	Purchasing Clerk	Karen Colmenares	\$30,000.00
End Grouping - Department Name				
Shipping	Shanta Vollman	Stock Clerk	James Marlow	\$30,000.00
Shipping	Kevin Mourgos	Stock Clerk	Joshua Patel	\$30,000.00
			Peter Vargas	\$30,000.00

The table is placed between the Start Grouping and End Grouping area of the repeating section.

Salary Details				
Start Grouping - Department Name				
Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
Shipping	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
Shipping	Payam Kaufling	Stock Clerk	Hazel Philtanker	\$26,400.00
Shipping	Matthew Weiss	Stock Clerk	James Landry	\$28,800.00
Shipping	Payam Kaufling	Stock Clerk	Ki Gee	\$28,800.00
Purchasing	Den Raphaely	Purchasing Clerk	Karen Colmenares	\$30,000.00
Shipping	Adam Fripp	Stock Clerk	James Marlow	\$30,000.00
Shipping	Shanta Vollman	Stock Clerk	Joshua Patel	\$30,000.00
Shipping	Kevin Mourgos	Stock Clerk	Peter Vargas	\$30,000.00
Shipping	Matthew Weiss	Shipping Clerk	Martha Sullivan	\$30,000.00
				\$7,924,800.00

6. Select the **Department Name** data column and then click the **Column** tab. Select Grouping > Group Left.

The screenshot shows the Microsoft Word ribbon with the 'Column' tab selected. In the 'Grouping' section of the ribbon, the 'No Grouping' option is currently selected, while 'Group Left' is highlighted with a red box. Below the ribbon, a table titled 'Salary Details' is displayed. The first column, 'Department Name', is highlighted with a blue selection bar. The table contains data for various employees across different departments, with the total annual salary for all employees in the 'Shipping' department highlighted in red at the bottom right.

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
Shipping	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
Shipping	Payam Kaufling	Stock Clerk	Hazel Philtanker	\$26,400.00
Shipping	Matthew Weiss	Stock Clerk	James Landry	\$28,800.00
Shipping	Payam Kaufling	Stock Clerk	Ki Gee	\$28,800.00
Purchasing	Den Raphaely	Purchasing Clerk	Karen Colmenares	\$30,000.00
Shipping	Adam Fripp	Stock Clerk	James Marlow	\$30,000.00
Shipping	Shanta Vollman	Stock Clerk	Joshua Patel	\$30,000.00
Shipping	Kevin Mourgos	Stock Clerk	Peter Vargas	\$30,000.00
Shipping	Matthew Weiss	Shipping Clerk	Martha Sullivan	\$30,000.00
				\$7,924,800.00

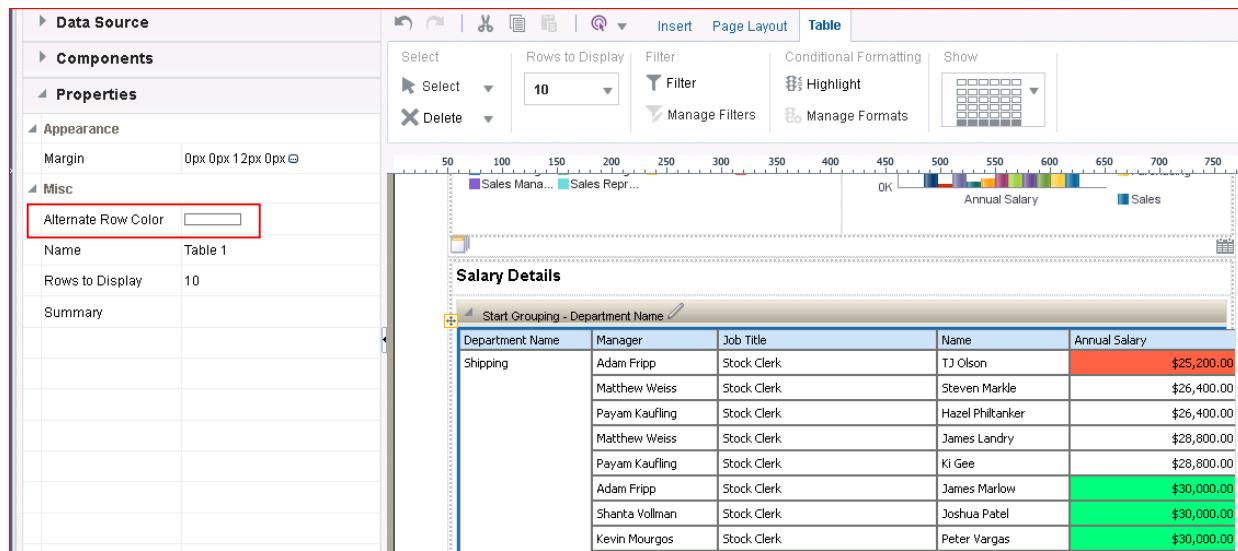
The table with the grouping should look like this:

This screenshot shows the same 'Salary Details' table after applying the 'Group Left' grouping. The entire column for 'Department Name' is now highlighted with a blue selection bar. The data for the 'Shipping' department is grouped together, with each employee's row under the 'Shipping' heading. The total annual salary for the 'Shipping' department is also highlighted in red at the bottom right of the group.

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
	Payam Kaufling	Stock Clerk	Hazel Philtanker	\$26,400.00
	Matthew Weiss	Stock Clerk	James Landry	\$28,800.00
	Payam Kaufling	Stock Clerk	Ki Gee	\$28,800.00
	Adam Fripp	Stock Clerk	James Marlow	\$30,000.00
	Shanta Vollman	Stock Clerk	Joshua Patel	\$30,000.00
	Kevin Mourgos	Stock Clerk	Peter Vargas	\$30,000.00
	Matthew Weiss	Shipping Clerk	Martha Sullivan	\$30,000.00
	Payam Kaufling	Shipping Clerk	Randall Perkins	\$30,000.00
				\$7,924,800.00

7. Now, you format the table to display colored alternate rows.

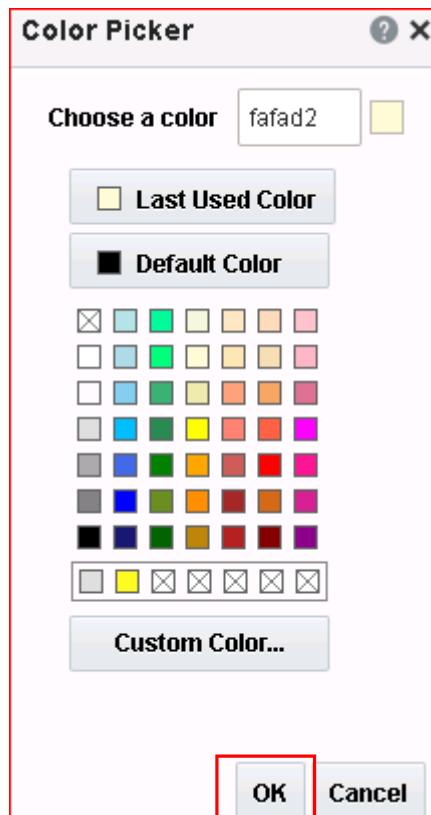
Select the table and click Properties.



The screenshot shows the 'Table' properties dialog box. In the 'Misc' section, the 'Alternate Row Color' dropdown is highlighted with a red box. To its right is a color picker showing a light yellow square. Below the dialog is a table titled 'Salary Details' with several rows of data. The rows alternate in color between white and light yellow.

Department Name	Manager	Job Title	Name	Annual Salary
Shipping	Adam Fripp	Stock Clerk	TJ Olson	\$25,200.00
	Matthew Weiss	Stock Clerk	Steven Markle	\$26,400.00
	Payam Kaufling	Stock Clerk	Hazel Philander	\$26,400.00
	Matthew Weiss	Stock Clerk	James Landry	\$28,800.00
	Payam Kaufling	Stock Clerk	Ki Gee	\$28,800.00
	Adam Fripp	Stock Clerk	James Marlow	\$30,000.00
	Shanta Vollman	Stock Clerk	Joshua Patel	\$30,000.00
	Kevin Mourgos	Stock Clerk	Peter Vargas	\$30,000.00

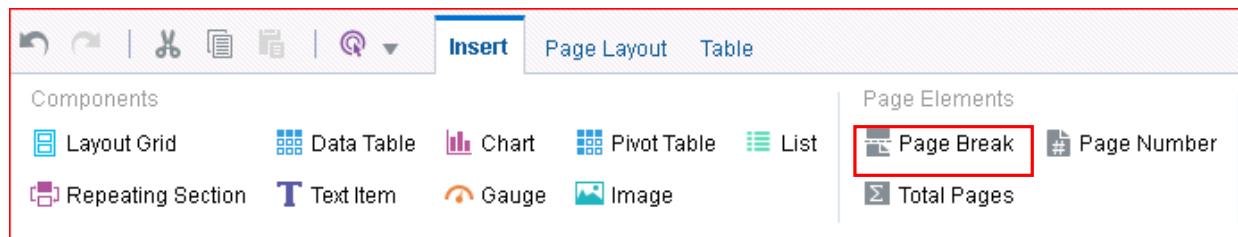
8. Select the Alternate Row Color option and pick a light yellow color from the Color Picker.



Click OK.

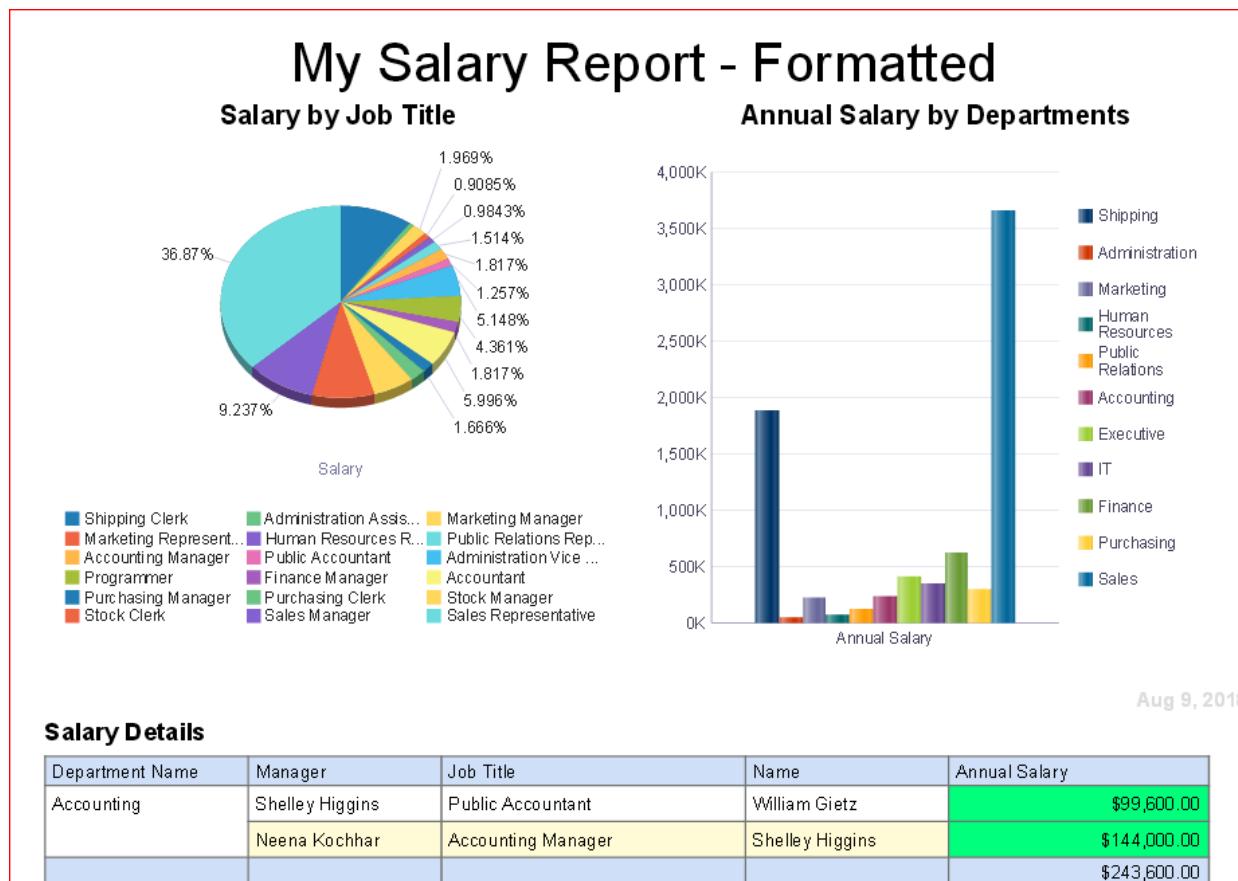
9. Add a page break to the repeating sections.

Select the table. Click **Page Break** under the Page Elements section.



10. Save the layout and select PDF from the preview options.

11. The report is displayed in a new browser window in PDF format.



Observe that the report has multiple pages, and is displaying page 1. Explore the other pages.

12. Close the window. Save the layout and return to Report Viewer.

Practice 6-4: Creating a Layout with a Gauge and a Pivot Table

Overview

In this practice, you create a layout that contains a gauge and a chart. You convert the chart into a pivot table, and you add a static image to the layout.

Assumptions:

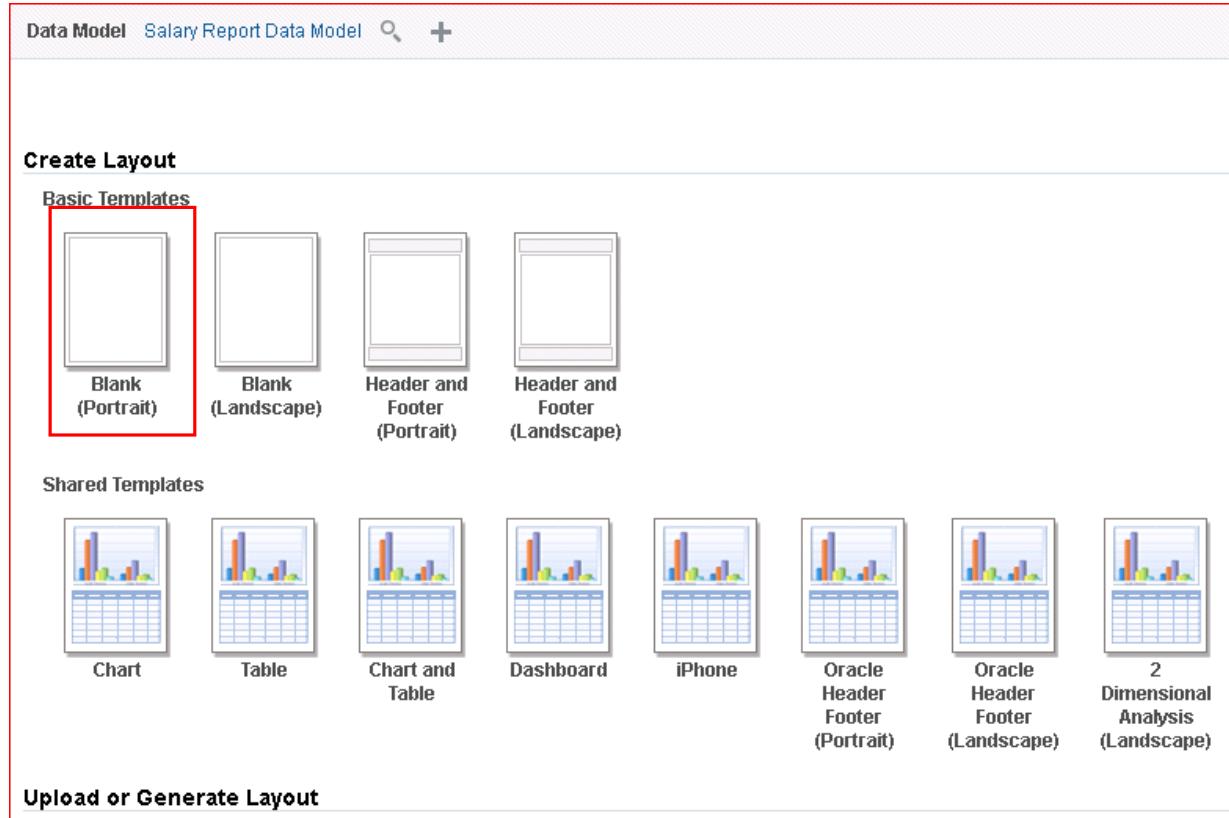
You are logged in to BI Publisher.

Tasks

1. In the Report Editor, click **Add New Layout**.

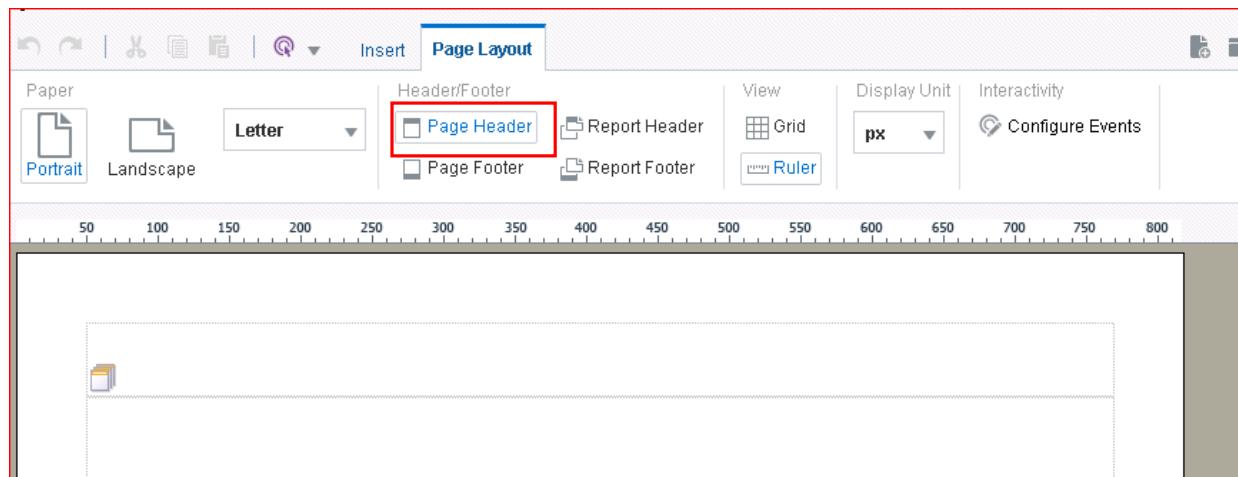


2. Select **Blank Portrait** from the Basic Templates section.

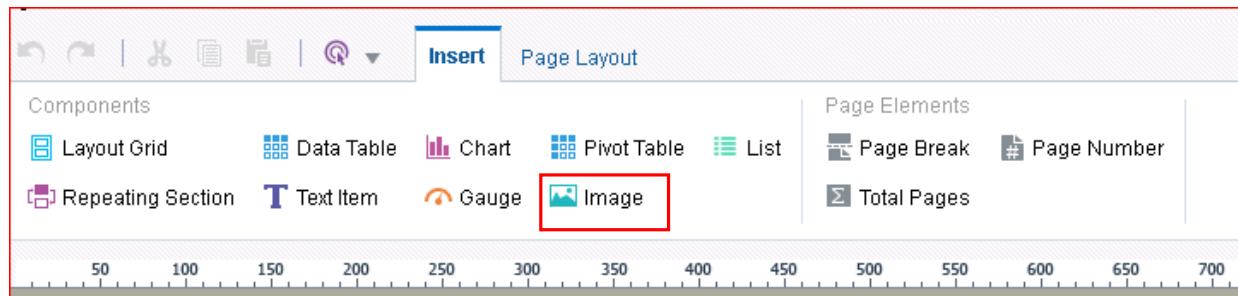


3. On the Page Layout tab, click **Page Header**. The page header appears.

Select the **Page Header** object.

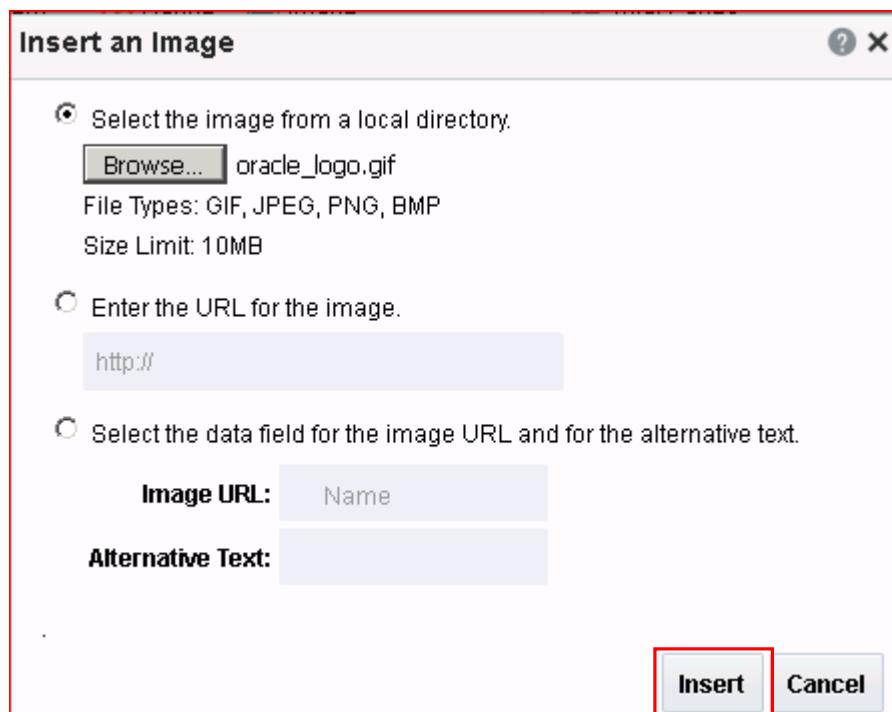


4. Click the **Insert** tab. Click **Image**.

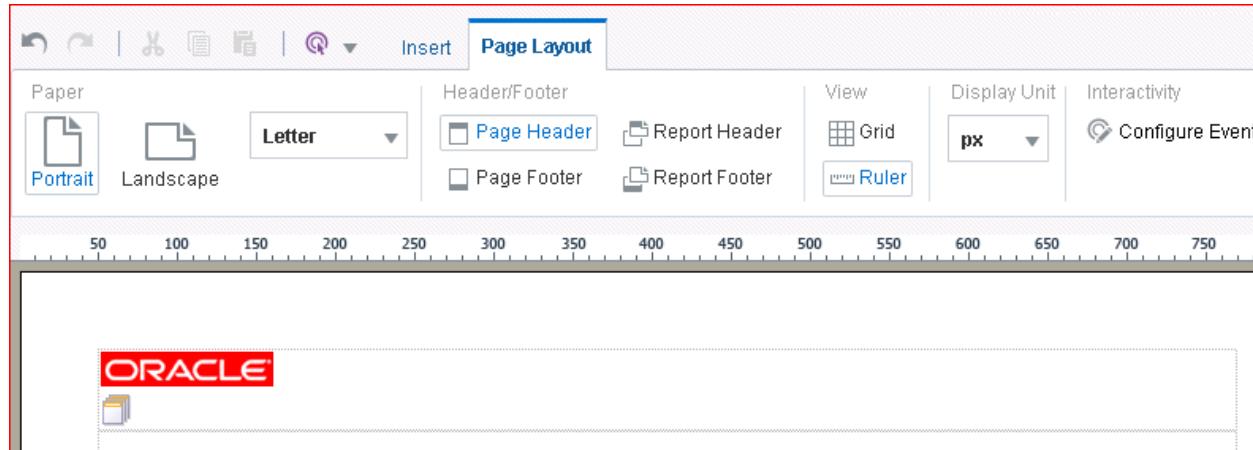


5. The "Insert an Image" dialog box appears. Click **Browse** to select the image.

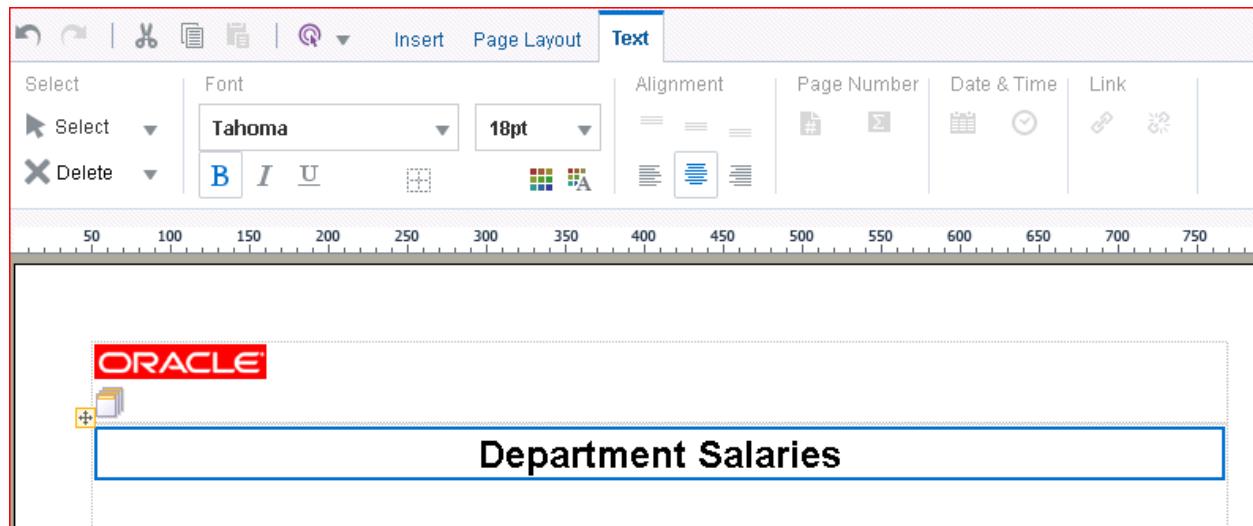
Navigate to D:/MyFiles and select oracle_logo.gif. Click **Insert**.



6. The image appears in the header.



7. Select the header and Insert **Text Item**. Double-click in the Text Item and enter **Department Salaries**. Format the title as you choose. The layout should look similar to this:



8. Insert a layout grid with five rows and 1 column.

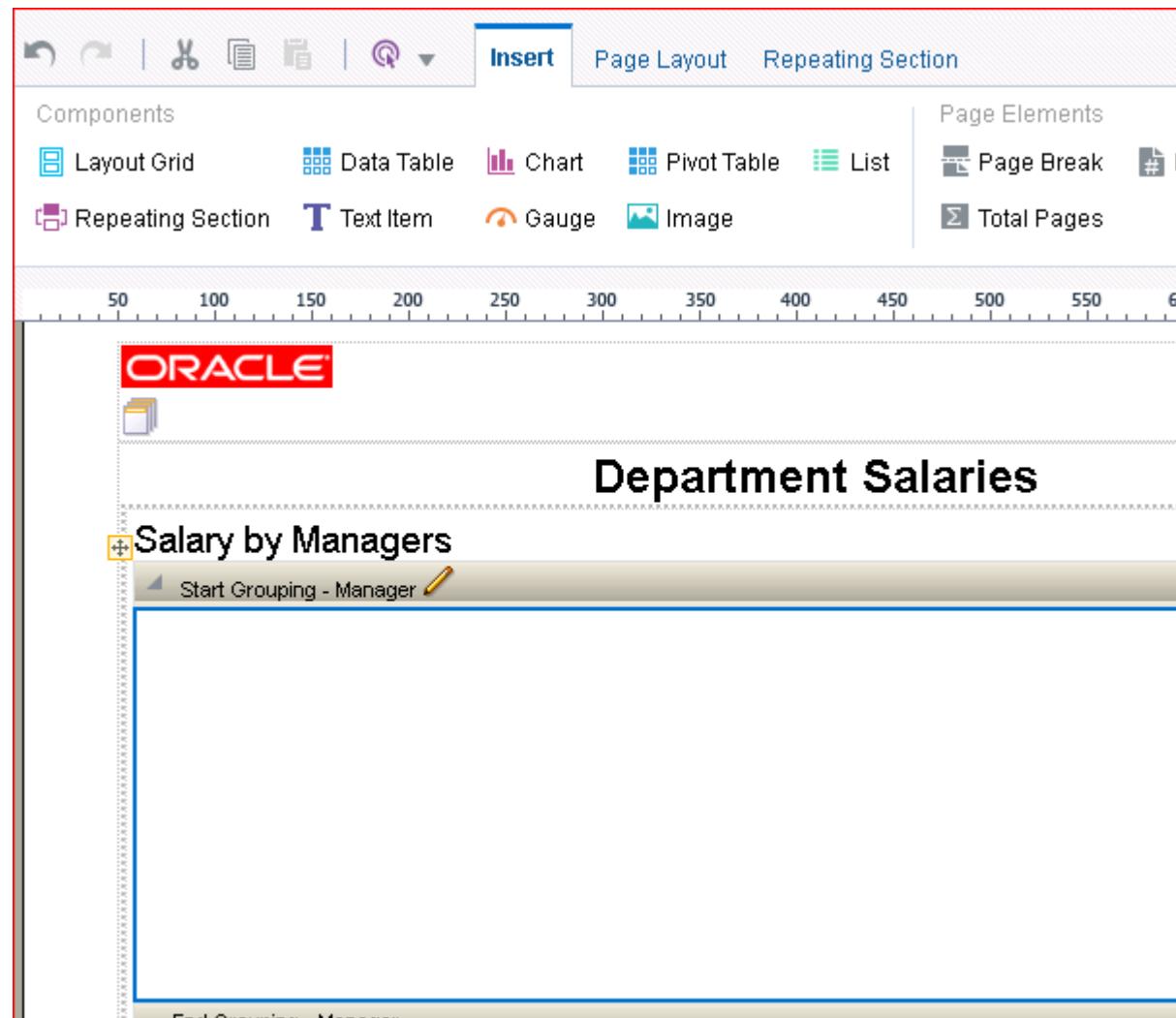
9. In the first row, provide the subtitle “Salary by Managers” to the gauge that you are going to create. Format it similar to the subtitles that you created in the previous practices.

The screenshot shows the Oracle BI Publisher Layout Editor interface. At the top, there's a ribbon bar with various icons and tabs like Insert and Page Layout. Below the ribbon is a toolbar for Text, which includes options for Select, Delete, Font (set to Tahoma, 14pt), Alignment, and various symbols. A horizontal ruler at the bottom shows positions from 50 to 750. The main workspace contains a report page with the ORACLE logo at the top. Below it is a section titled "Department Salaries" and a subtitle "Salary by Managers". The subtitle is highlighted with a yellow selection box.

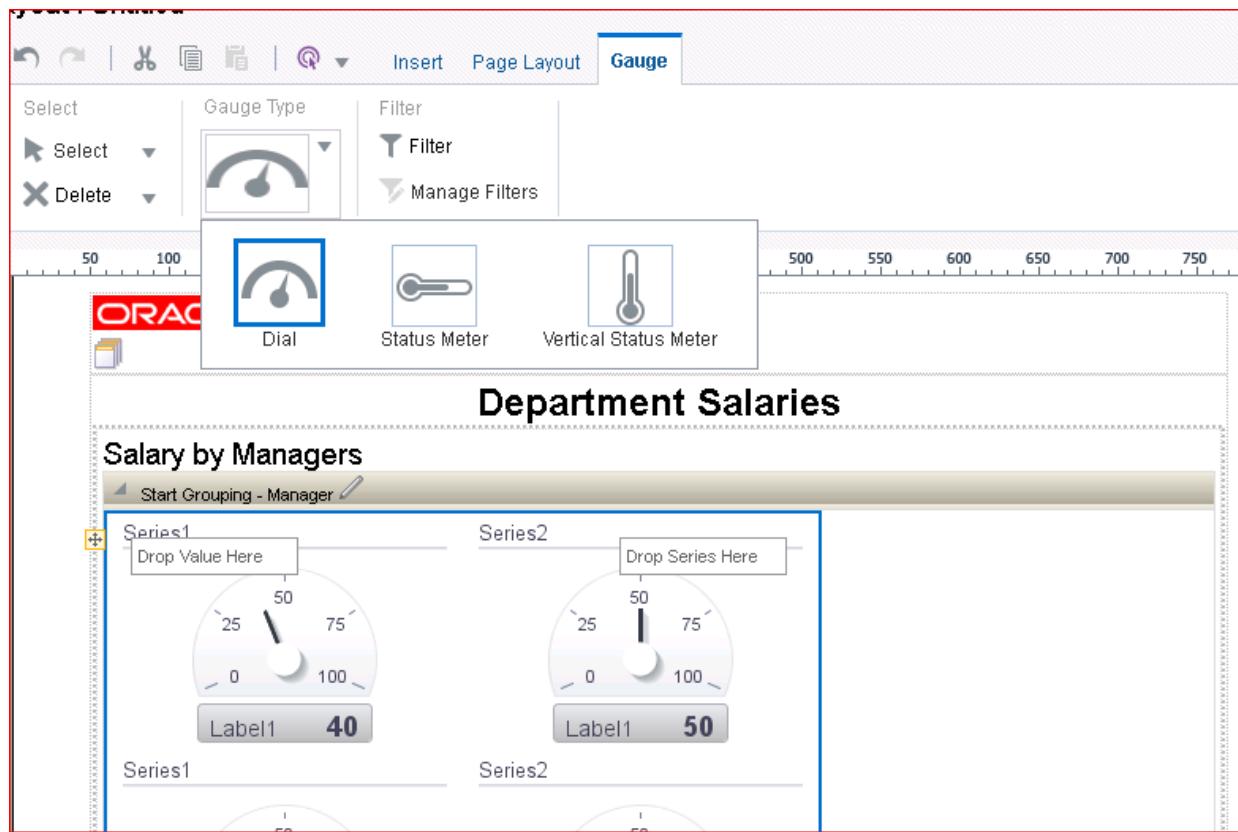
10. Add a repeating section below the subtitle as you did in the previous practice, selecting Manager as the repeating element. Your layout should look like this:

This screenshot shows the same Layout Editor workspace after adding a repeating section. The "Salary by Managers" subtitle is now part of a repeating group. Above it, a grey bar indicates "Start Grouping - Manager". Below the subtitle, a large empty rectangular area represents the repeating section. At the bottom of the grouping, another grey bar indicates "End Grouping - Manager".

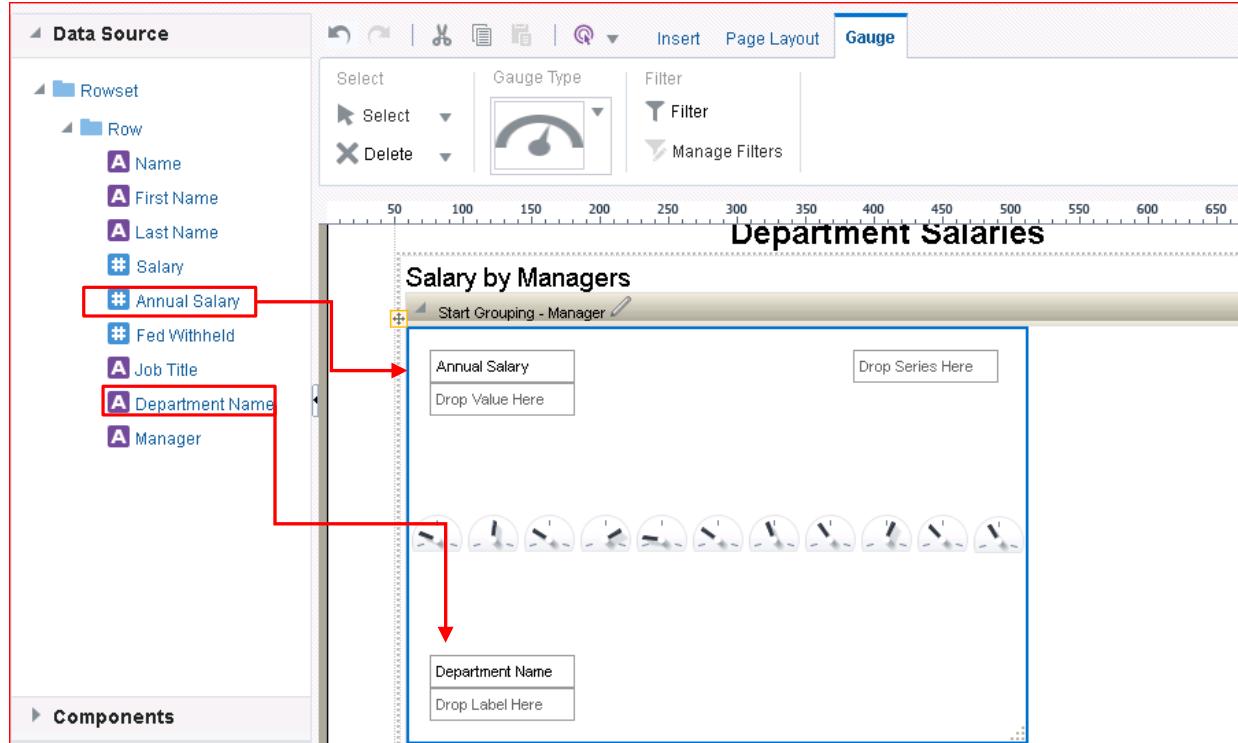
11. Select the repeating section and then click the **Insert** tab. Click **Gauge**.



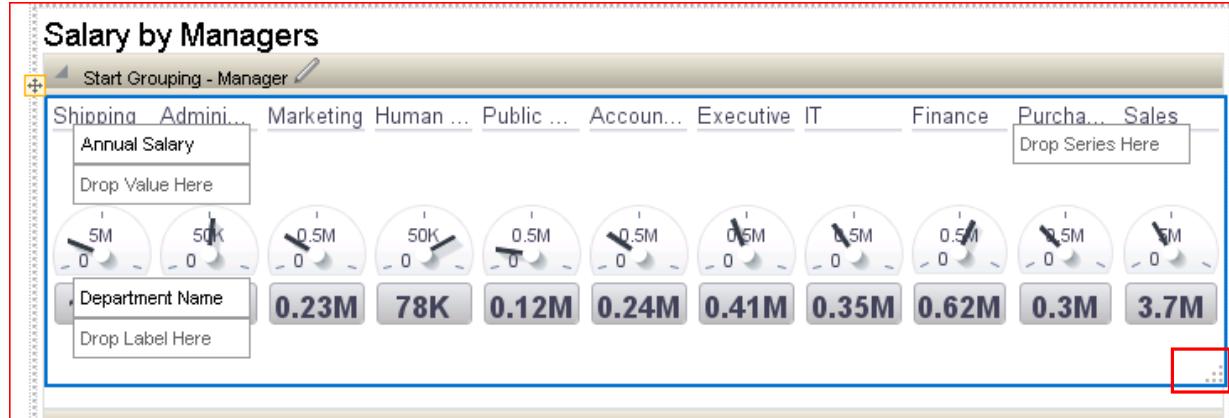
A gauge appears within the repeating section.



12. Drag **Annual Salary** to Drop Value Here and **Department Name** to Drop Label Here.



13. You can resize the gauge to fit it in the display area.



14. Add a pivot table to this layout.

A pivot table provides views of multidimensional data in tabular form. It supports multiple measures and dimensions, and subtotals at all levels. Layout Editor converts the label, series, and value elements of a chart into the appropriate rows, columns, and data elements of a pivot table. No formatting is applied to the pivot table.

Note that when the pivot table is selected, a Pivot Table tab appears. You use this tab to apply filters, totals, and so on.

Provide the subtitle Salary Pivot to the grid and format it as you have done previously for other subtitles.

The screenshot shows the SAP Fiori Launchpad with the 'Layout Editor' application selected. The top navigation bar includes icons for back, forward, search, and help, followed by 'Insert', 'Page Layout', and 'Layout Grid'. The 'Components' pane on the left lists various objects: Layout Grid, Data Table, Chart, **Pivot Table** (which is highlighted with a red box), List, Repeating Section, Text Item, Gauge, and Image. The main workspace displays a card titled 'Department Salaries' with a subtitle 'Salary by Managers'. Below the subtitle is a horizontal navigation bar with links for Shipping, Admini..., Marketing, Human ..., Public ..., Accoun..., Executive, IT, Finance, Purcha..., and Sales. Underneath this is a row of ten circular gauge charts, each with a value label below it: 1.9M, 53K, 0.23M, 78K, 0.12M, 0.24M, 0.41M, 0.35M, 0.62M, 0.3M, and 3.7M. At the bottom of the card is a section titled 'Salary Pivot' with a red box highlighting the first two cells of the grid area.

15. Select the grid row, click the **Insert** tab, and then click **Pivot Table**, or drag the Pivot Table object from the Components pane. A pivot table is displayed.

The screenshot shows the SAP Fiori Launchpad with the 'Layout Editor' application selected. The top navigation bar includes icons for back, forward, search, and help, followed by 'Insert', 'Page Layout', and 'Pivot Table' (which is highlighted with a red box). The 'Components' pane on the left lists various objects: Select, Filter, Row Grand Total, Row Subtotal, Column Grand Total, Column Subtotal, Convert, Delete, Filter, Manage Filters, and Switch Row. The main workspace displays a card titled 'Salary Pivot' with a red box highlighting the first two cells of the grid area. The grid itself has three columns and four rows, with labels '[Drop Columns Here]', '[Drop Rows Here]', and '[Drop Data Here]' in the respective cells.

16. Add the data elements from the Data Source pane. Drag:

- Department Name to Drop Rows Here
- Job Title to Drop Columns Here
- Annual Salary to Drop Data Here

The pivot table will look like this:

The screenshot shows the Microsoft Excel ribbon with the 'Pivot Table' tab selected. In the 'Data Source' pane on the left, several data elements are listed under 'Rowset' and 'Row': Name, First Name, Last Name, Salary, Annual Salary, Fed Withheld, Job Title, Department Name, and Manager. The 'Salary' item is highlighted with a red box and has a red arrow pointing to the 'Data' column in the pivot table. The 'Job Title' item is also highlighted with a red box and has a red arrow pointing to the 'Columns' section of the pivot table. The 'Department Name' item is highlighted with a red box and has a red arrow pointing to the 'Rows' section of the pivot table. The pivot table itself is titled 'Salary Pivot' and contains the following data:

Department	Job Title	Shipping Clerk	Administration Assistant	Marketing Manager	Marketing Representative
Shipping		64300.0	0	0	
Administration		0	4400.0	0	
Marketing		0	0	13000.0	6
Human Resources		0	0	0	
Public Relations		0	0	0	
Accounting		0	0	0	
Executive		0	0	0	

17. Convert a pivot table to a chart. For this, you use a copy of the pivot table that you just created. Use the Copy and Paste icons in Layout Editor to copy the pivot table.

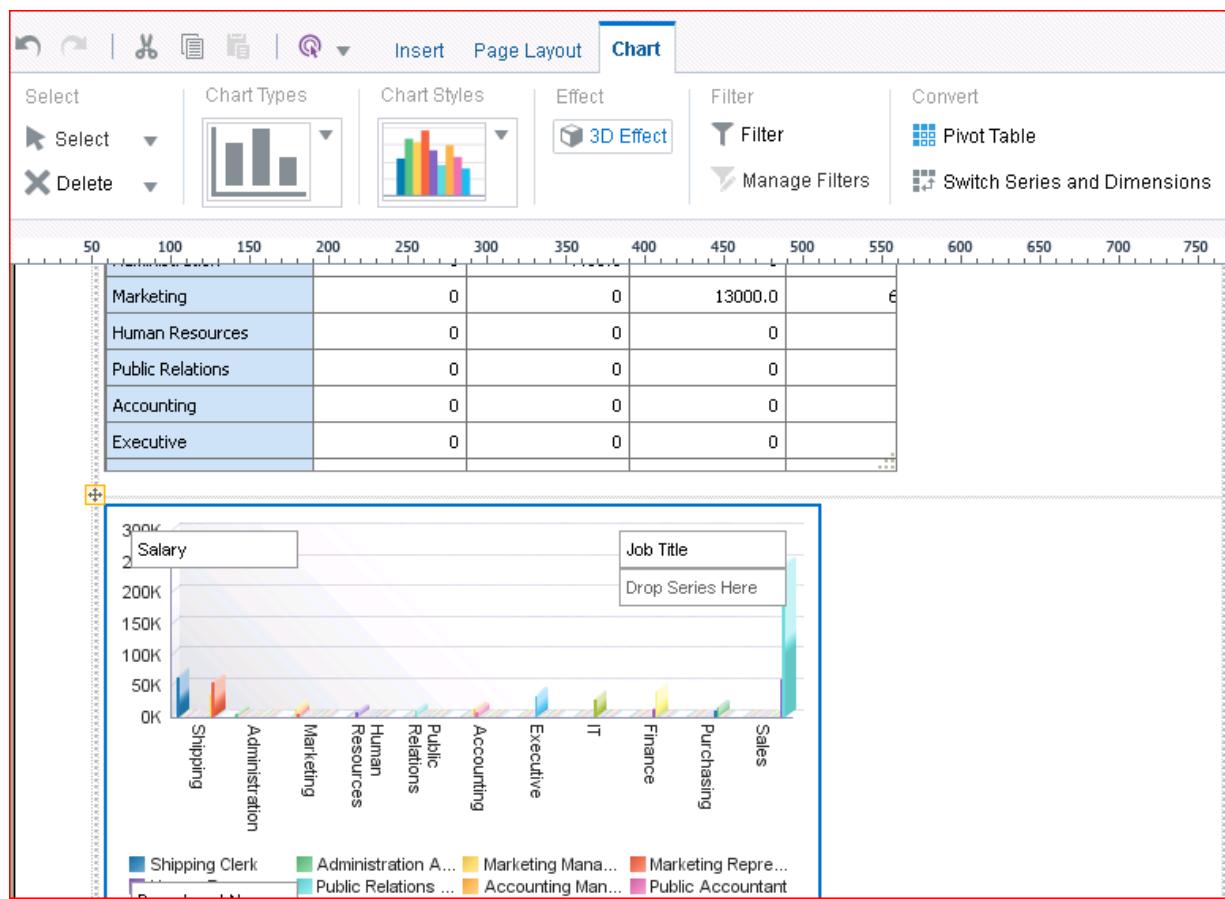
The screenshot shows the Microsoft Word Layout Editor interface. The ribbon at the top has tabs for Home, Insert, Page Layout, and Pivot Table. The Pivot Table tab is currently selected. Below the ribbon, there are several toolbars and a status bar. The main area displays a pivot table with data for various departments and roles, such as Shipping Clerk, Administration Assistant, Marketing Manager, and Marketing Representative. The 'Convert' section of the ribbon is highlighted with a red box around the 'Convert to Chart' button. A red arrow points from the bottom of the first pivot table down to the second one.

18. Select the next grid and paste the table.

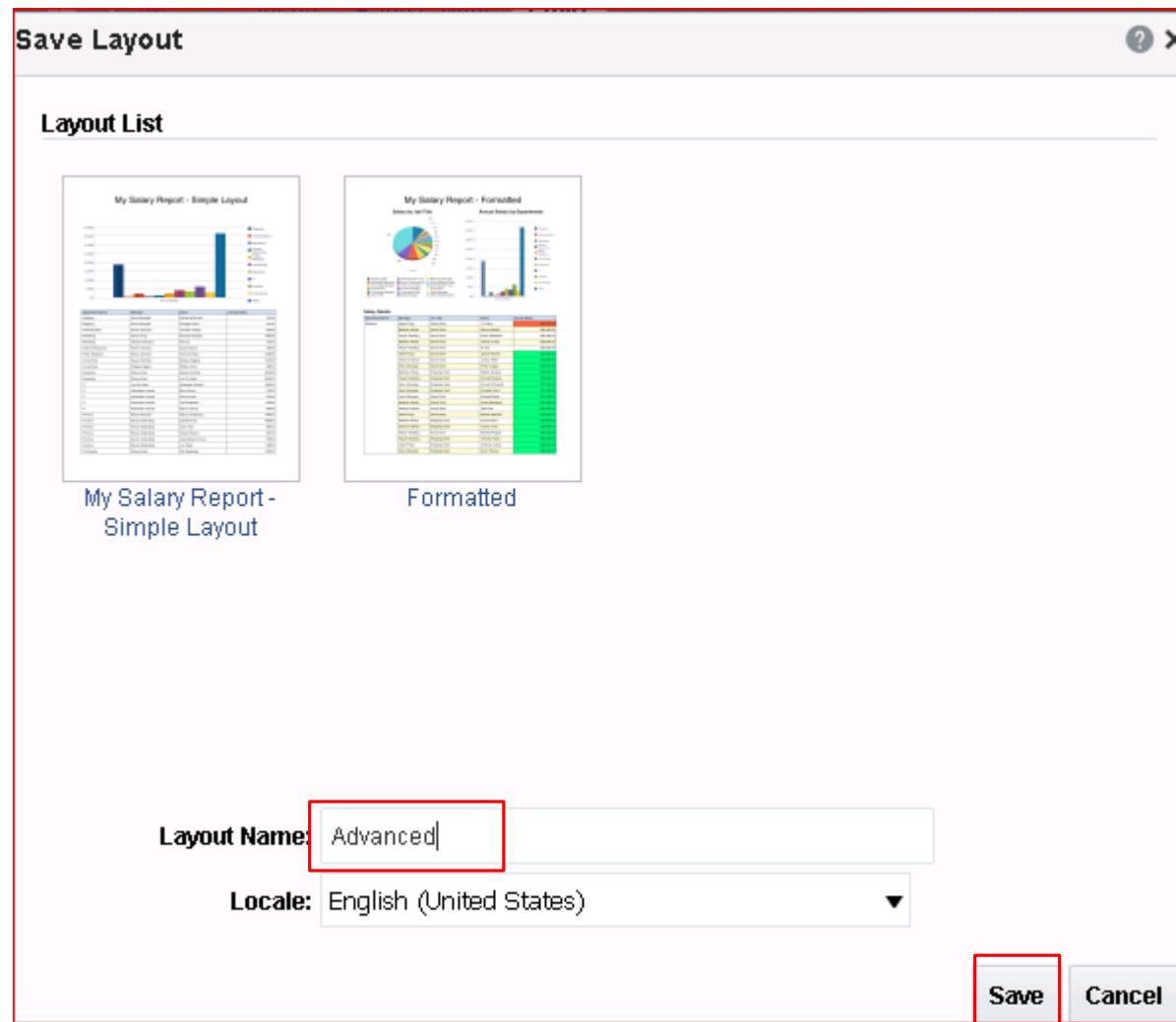
This screenshot shows the Microsoft Word Layout Editor with two identical pivot tables displayed side-by-side. Both tables have the same data structure and rows. The second pivot table's ribbon is shown, with the 'Convert' tab selected and the 'Convert to Chart' button highlighted with a red box. A red arrow points from the bottom of the first pivot table down to the second one, indicating the user is about to perform a copy-and-paste operation between them.

Observe that when you select a pivot table, the options to convert the table to a chart or to switch rows and columns are enabled.

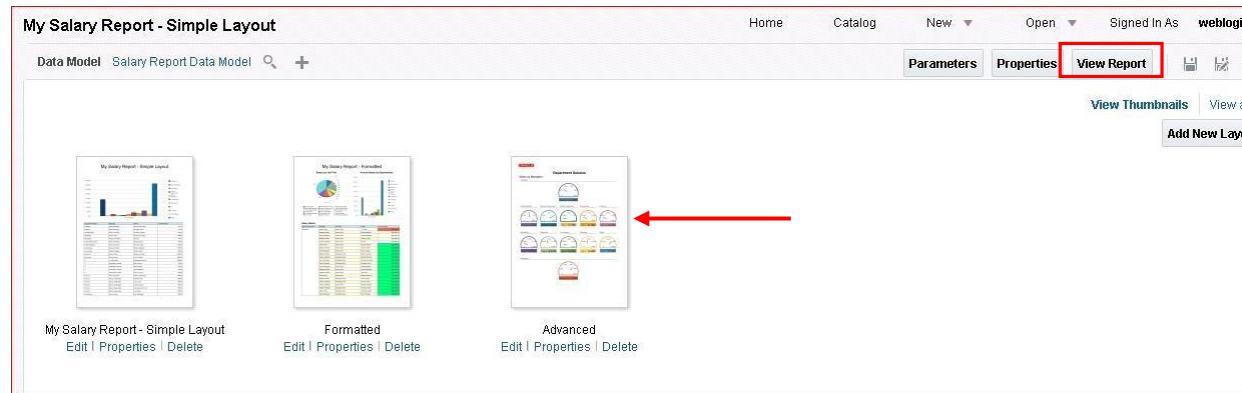
19. Click Convert to Chart. A copy of the pivot table is converted to a chart and displayed. Similarly, you can convert a chart element to a pivot table in Layout Editor.



20. Click Save to save the layout with the name Advanced.



21. The layout now displays the saved name in the layout title bar. Click **Return**.
22. The Report Editor window opens. Observe that all the available layouts for the report are displayed.



- Save the report and click the View Report icon.
23. The report is displayed in Report Viewer with the gauge, pivot table, and the chart created by converting the pivot table.



Note: You can drill down through the data further to suit your requirements. The gauge reflects the data values for the manager Steven King.

Practice 6-5: Creating a Boilerplate

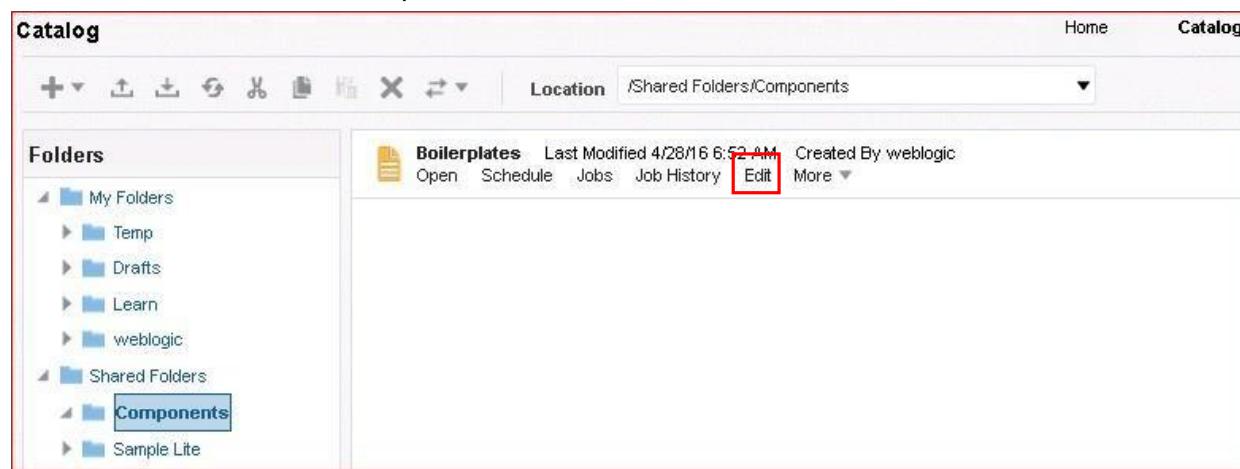
Overview

In this practice, you create a boilerplate template available for use by all users.

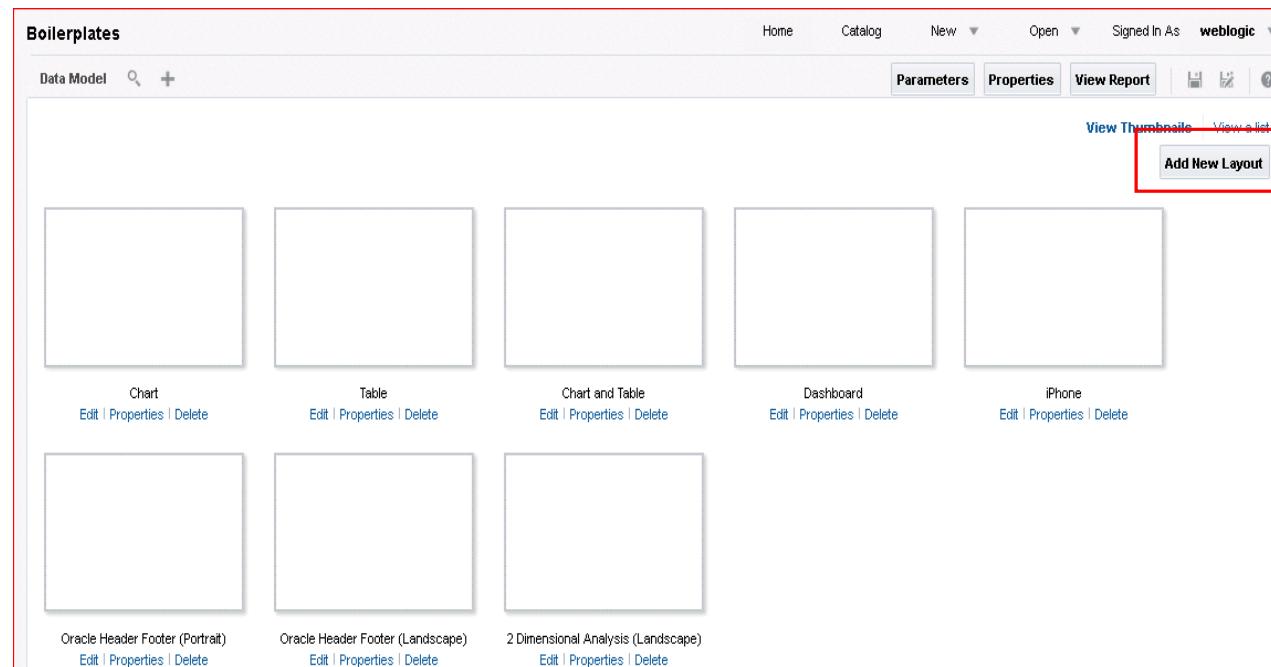
When a predefined layout does not suit your business needs, you can create a boilerplate template—a predefined template that you or your administrator designs or uploads for all users or for your personal use.

Tasks

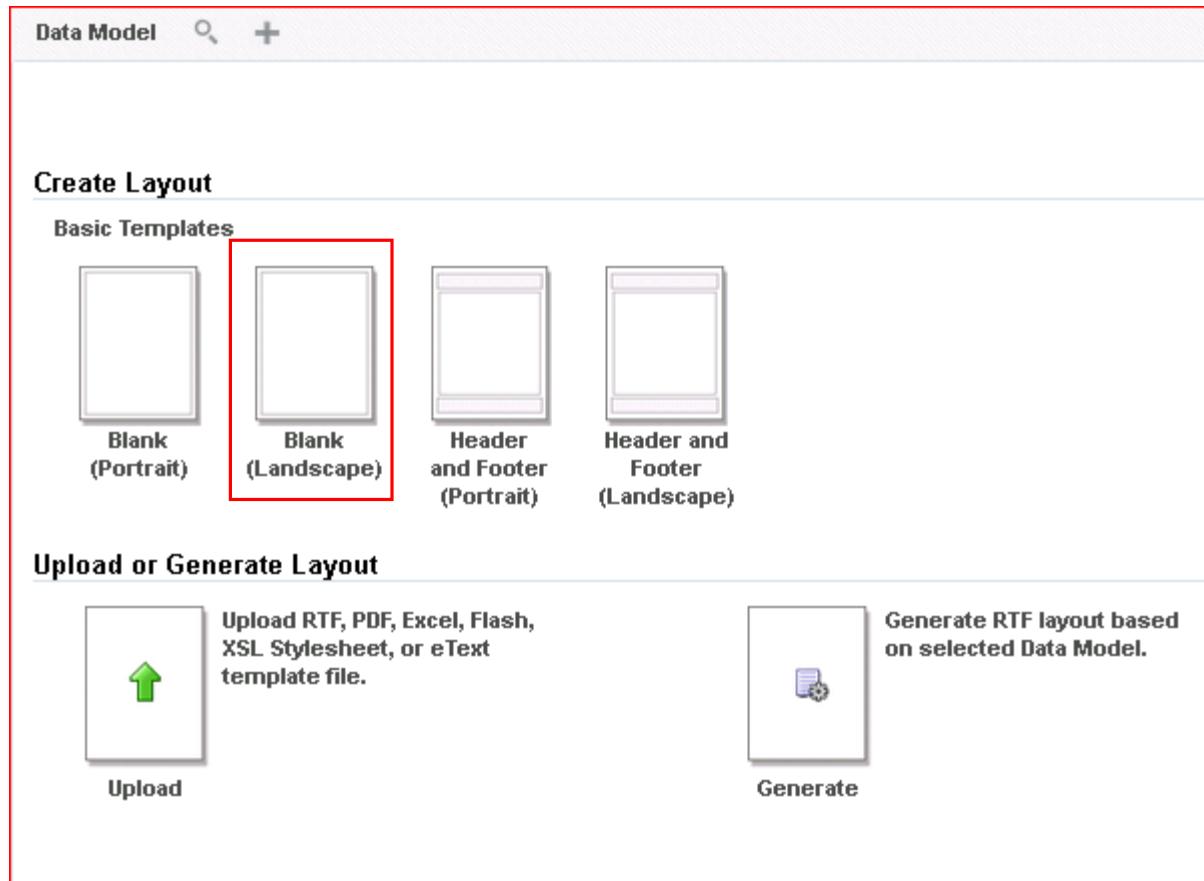
1. Click the **Catalog** link on the global header, and navigate to \Shared Folders\Components.
2. Click the **Edit** link under Boilerplates.



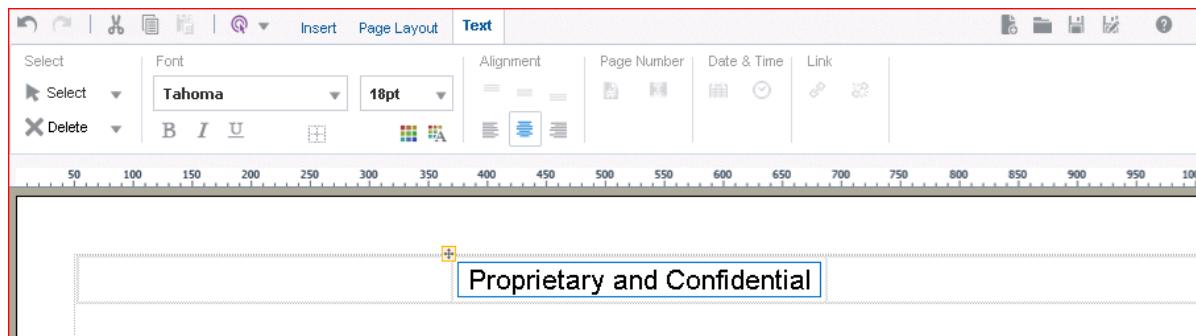
3. Report Editor appears. BI Publisher provides predefined layouts for use as skeleton-type boilerplates, such as Chart or Mobile Apple iPhone. You can, however, create your own templates to use as boilerplates.



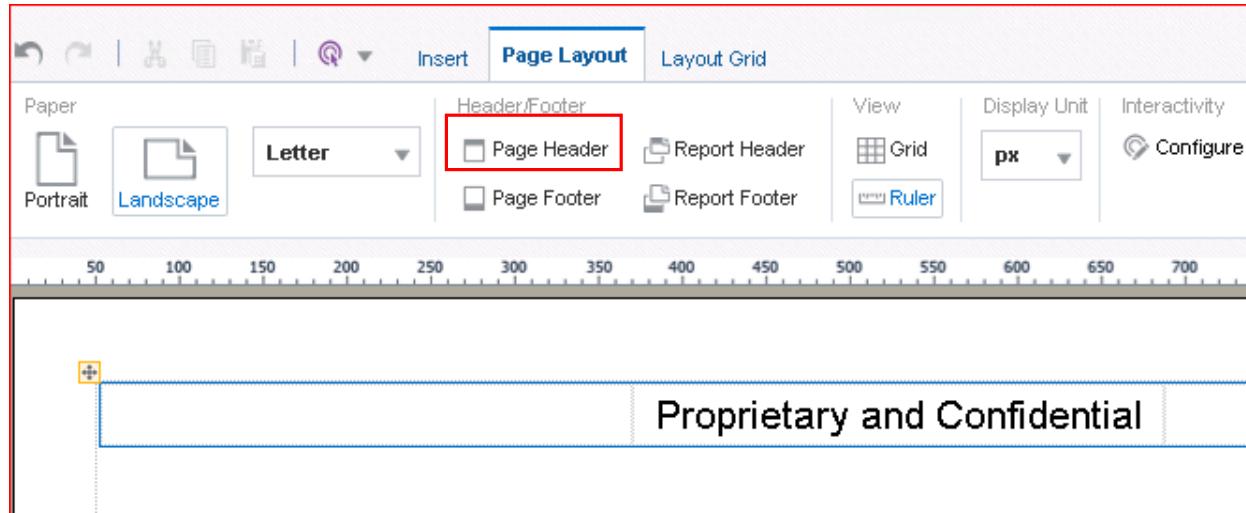
4. Click **Add New Layout**. You can upload your own layout created by using Template Builder for MS Word (you will practice this later in the course) or design a new layout by using Layout Editor.



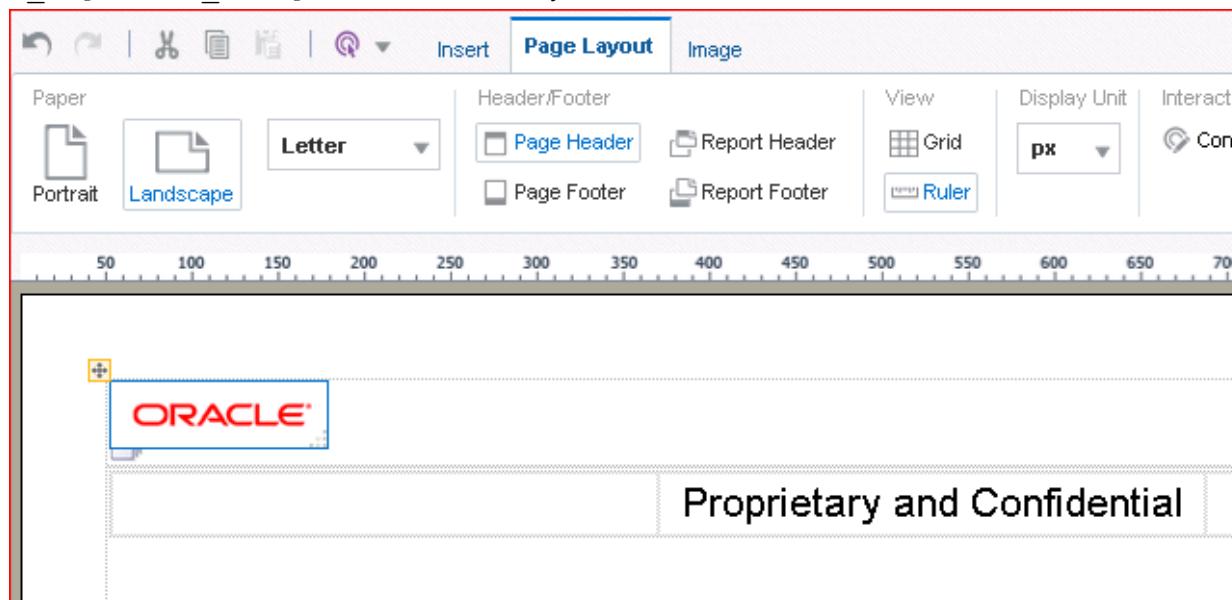
5. Select **Blank (Landscape)**.
6. The Layout Editor appears. Because you do not have a data model for the template, the Data Source pane is blank.
- Just as you added components previously, begin to design your new boilerplate template. Create a layout grid with three columns and a single row.
 - Add Text Item to the center column and enter **Proprietary and Confidential**.



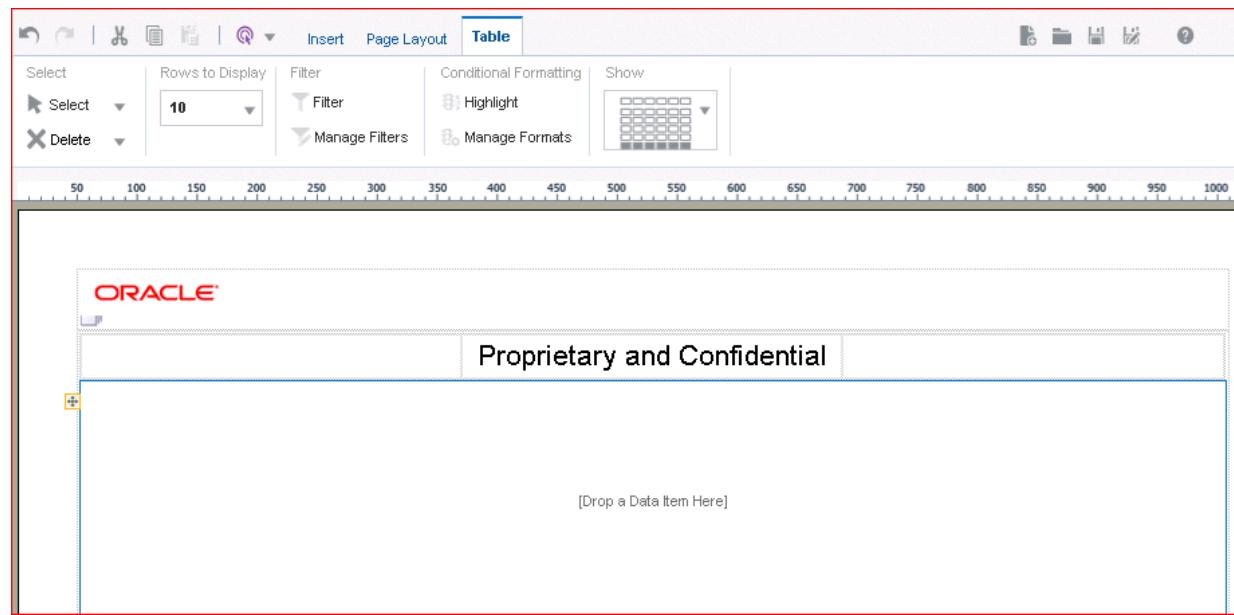
7. Click Page Layout > Page Header.



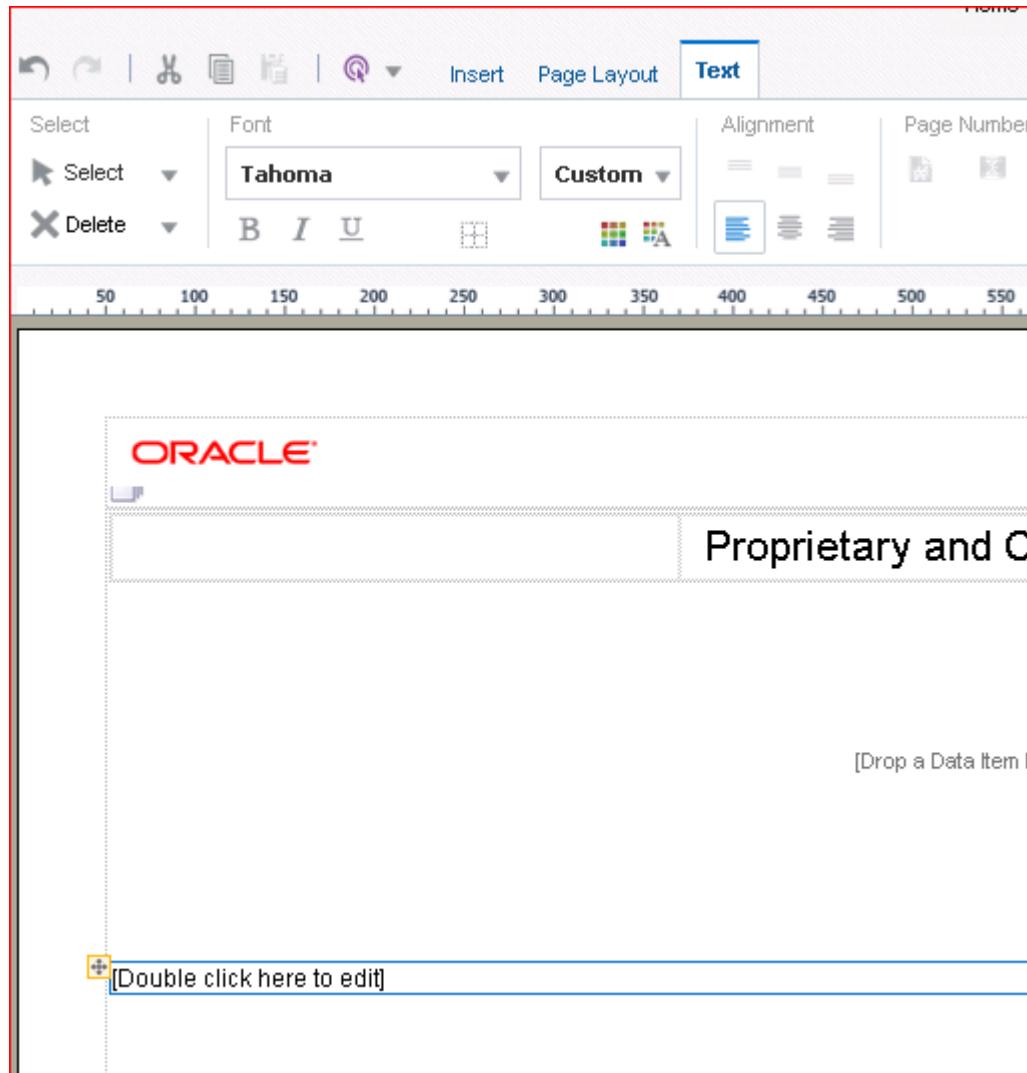
8. Insert an image in this page header. Navigate to and select the **Oracle** corporate image, O_signature_clr.gif, located in D:/MyFiles



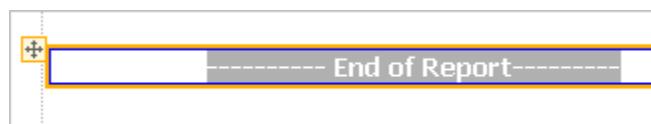
9. Drag the **Data Table** object to below the row with “Proprietary and Confidential.” When an end user opens this template for use, he or she can add any columns to the “Drop a Data Item Here” section for their report.



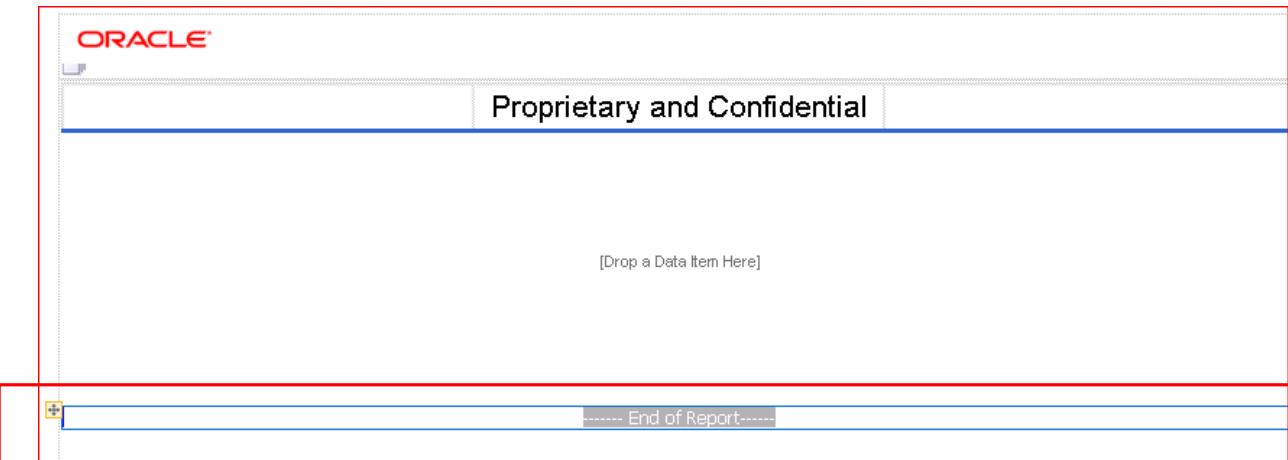
10. Drag a **Text Item** object below the data table.



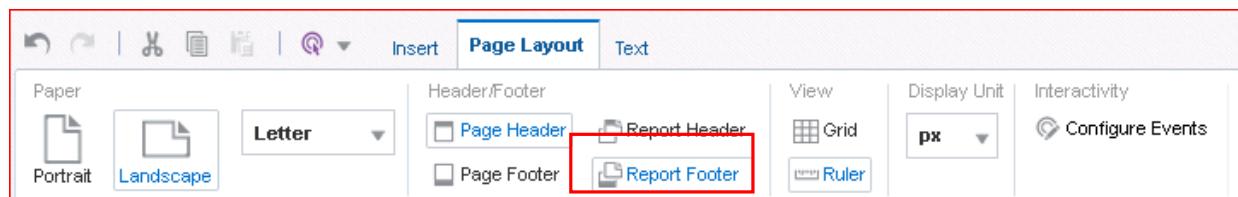
11. Double-click in the Text Item object and enter -- **End of Report**--.



12. Your template should look similar to this:

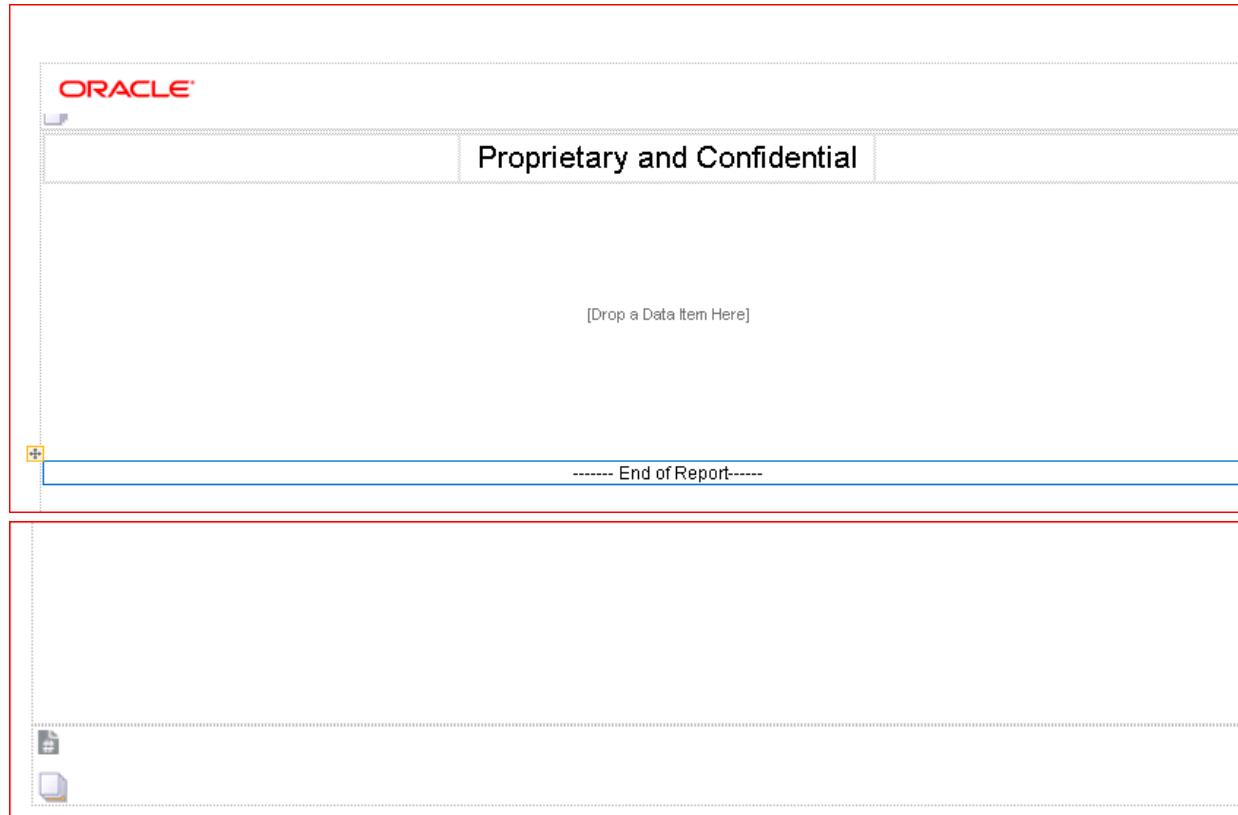


13. Click the **Page Layout** tab and click **Report Footer**.

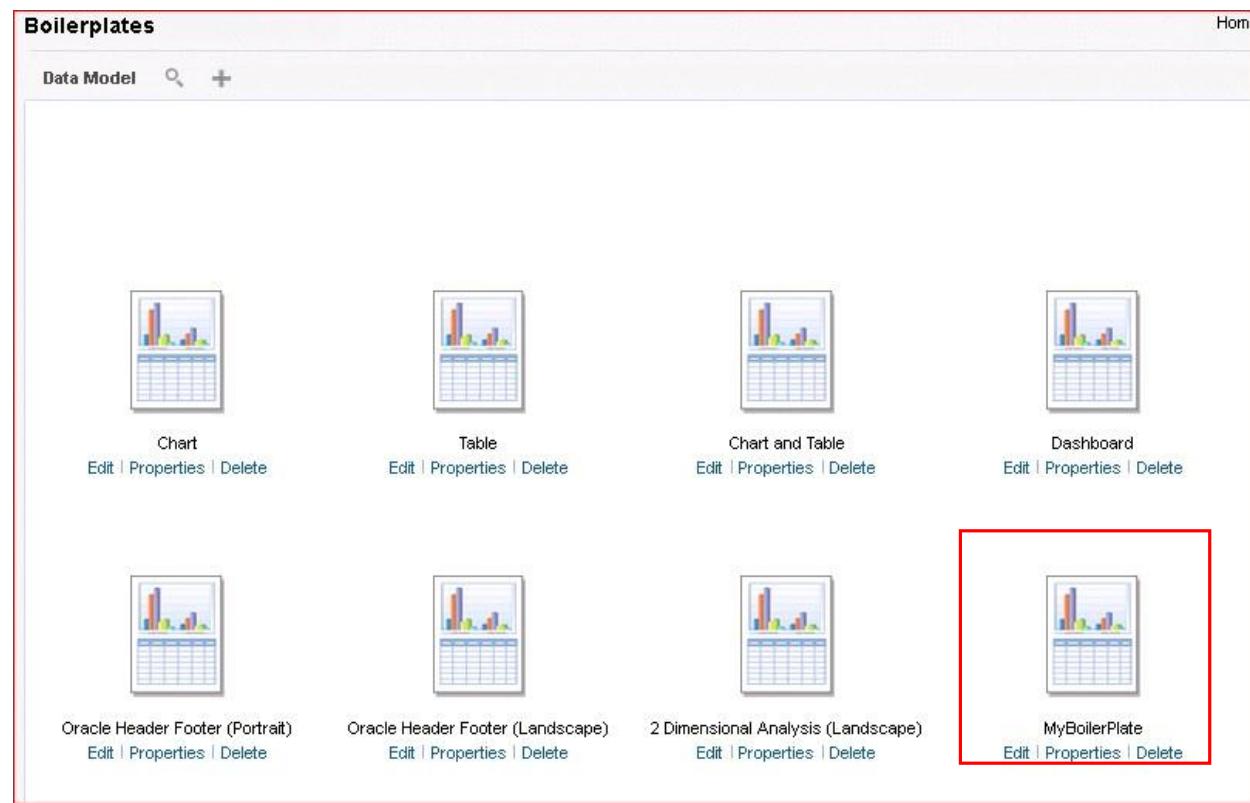


14. Click the **Insert** tab and then click **Page Number**. Page number appears in the Report Footer section.

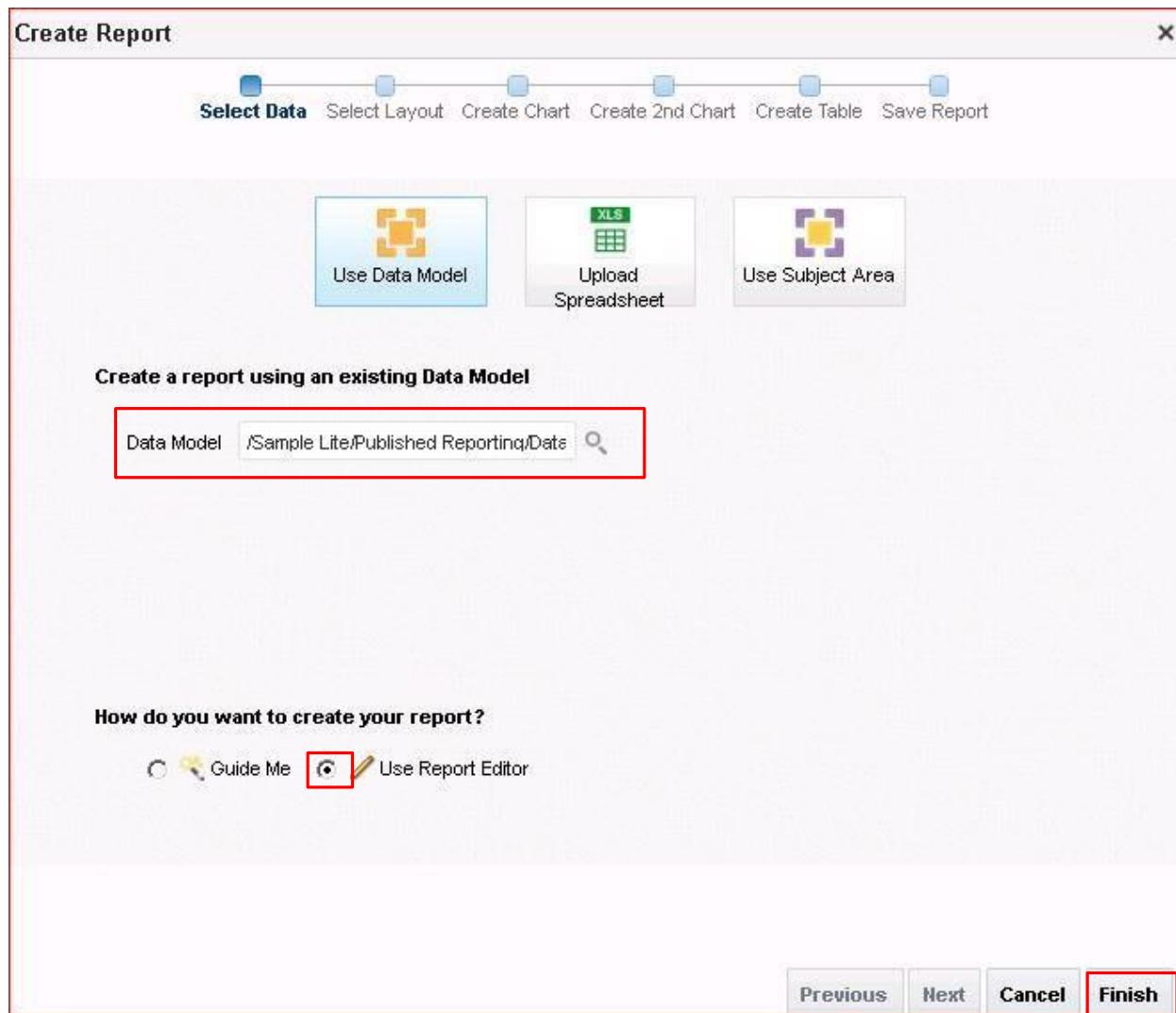
The layout template should look like this:



15. Click the Save icon and, in the Layout Name text box, enter **MyBoilerplate** and click **Save**.
16. Click **Return**. Your boilerplate appears in Report Editor and is now ready for use.

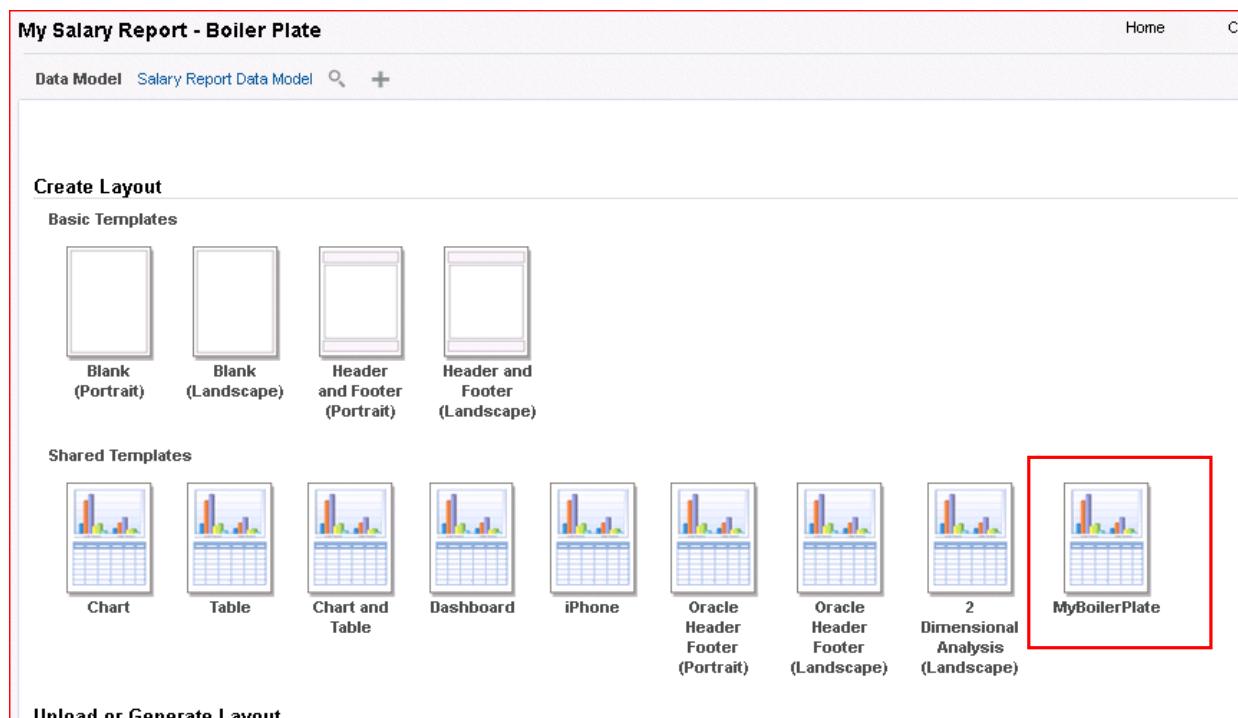


17. Create a new report and select the data model Shared Folders > Sample Lite > Published Reporting > Data Models > Salary Report Datamodel.



18. Select the User Report Editor option; this will guide you to save the report. Click the Finish button to save the report.
19. Save the report as My Salary Report – Boiler Plate under My Folders > Learn.

20. The report is opened in the Report Editor window. Select **MyBoilerplate** from the Shared Templates section.



21. This will open Layout Editor for the report. Observe that you have the data elements available because the boilerplate layout is now associated with a data source (data model).

The screenshot shows the Oracle Reports Layout Editor interface. On the left, there is a 'Data Source' tree view showing a 'Rowset' node with various columns listed. The main workspace contains a layout grid. The header section of the grid includes the 'ORACLE' logo and the text 'Proprietary and Confidential'. The footer section includes the text '----- End of Report-----' and a placeholder '[Drop a Data Item Here]'. The toolbar at the top includes icons for Home, Catalog, New, and Options, along with an 'Insert' button and a 'Page Layout' tab.

22. Add the data elements to the table to suit your requirements.

Drag the elements from the data source to the grid "Drop a Data Item Here" area.

In this example, Department Name, Manager, Job Title, and Annual Salary are added. Format the Annual Salary column to display currency. Save the layout template as BP.

Department Name	Manager	Job Title	Annual Salary
Shipping	Kevin Mourgos	Shipping Clerk	\$31,200.00
Shipping	Kevin Mourgos	Shipping Clerk	\$31,200.00
Administration	Neena Kochhar	Administration Assistant	\$52,800.00
Marketing	Steven King	Marketing Manager	\$156,000.00
Marketing	Michael Hartstein	Marketing Representative	\$72,000.00
Human Resources	Neena Kochhar	Human Resources Representative	\$78,000.00
Public Relations	Neena Kochhar	Public Relations Representative	\$120,000.00
Accounting	Neena Kochhar	Accounting Manager	\$144,000.00
Accounting	Shelley Higgins	Public Accountant	\$99,600.00
Executive	Steven King	Administration Vice President	\$204,000.00
			\$7,924,800.00

- Click **Return** to return to Report Editor.

Report Editor displays the layout that you created just now, using the boilerplate template.

24. Save the report and click the View Report icon. The report is displayed in Report Viewer.

My Salary Report - Boiler Plate

Home Catalog New ▾

BP ORACLE®

Proprietary and Confidential

Department Name	Manager	Job Title	Annual Salary
Shipping	Kevin Murgos	Shipping Clerk	\$31,200.00
Shipping	Kevin Murgos	Shipping Clerk	\$31,200.00
Administration	Neena Kochhar	Administration Assistant	\$52,800.00
Marketing	Steven King	Marketing Manager	\$156,000.00
Marketing	Michael Hartstein	Marketing Representative	\$72,000.00
Human Resources	Neena Kochhar	Human Resources Representative	\$78,000.00
Public Relations	Neena Kochhar	Public Relations Representative	\$120,000.00
Accounting	Neena Kochhar	Accounting Manager	\$144,000.00
Accounting	Shelley Higgins	Public Accountant	\$99,600.00
Executive	Steven King	Administration Vice President	\$204,000.00
			\$7,924,800.00

----- End of Report-----

1

**Practices for Lesson 7: Using
Template Builder to Create
RTF Templates**

Practices for Lesson 7: Overview

Goal

To explore and create RTF templates by using the MS Word Template Builder add-in (Template Builder)

Practices Overview

You create RTF templates, add formatting, review and update properties for fields, and work in both connected and disconnected modes. You also create Excel templates using Excel Template Builder.

Time

70 - 80 minutes

Practice 7-1: Exploring Template Builder and Creating an RTF Template from a Sample File

Overview

In this practice, you review Template Builder components and build an RTF template from a sample file. You load sample XML data, preview the report, update field properties, and save the RTF layout.

Tasks

1. Create a new top-level folder on your D drive named **Learn**.
2. Navigate to `D:\Program Files (x86)\Oracle\BI Publisher\BI Publisher Desktop\Template Builder for Word\samples\RTF templates\Balance Letter` and select **Balance Letter Start**. Balance Letter Start.rtf is a sample template file. Copy Balance Letter Start.rtf to the D:\Learn folder. The reason why we are copying the sample template is so we do not overwrite the original.
3. Downloading the data model xml file: Edit the Balance Letter Datamodel. Connect to BI Publisher and Navigate to the Balance Letter Datamodel found in Shared Folders -> Sample Lite -> Published Reporting -> Data Models.

The screenshot shows the BI Publisher Catalog interface. On the left, there is a tree view under the 'Folders' section with categories like Components, Sample Lite, Subject Area Contents, KPIs, Published Reporting, Analyses, and Data Models. The 'Data Models' category is selected and highlighted with a blue border. On the right, a list of data models is displayed with their details. One item, 'Balance Letter Datamodel', has its 'Edit' button highlighted with a red box. The list includes:

- 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
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

4. Click Data Tab and view the data. Click the Export Tab to export the xml file.

Balance Letter Datamodel

Data Model

Properties

- ▲ **Data Sets**
 - >New DataSet 1
 - Event Triggers
 - Flexfields
 - List of Values
 - Parameters
 - Bursting

Diagram Structure **Data** Code

Rows 5 View Export Save As Sample

ARXCOBLX

 ▲ G_CUSTOMER

 CUSTOMER_NUMBER (**1005**)

 CUSTOMER_NAME (**Vision Operations**)

 ADDRESS_LINE1 (**5645 Main Street**)

 ADDRESS_LINE2

 ADDRESS_LINE3

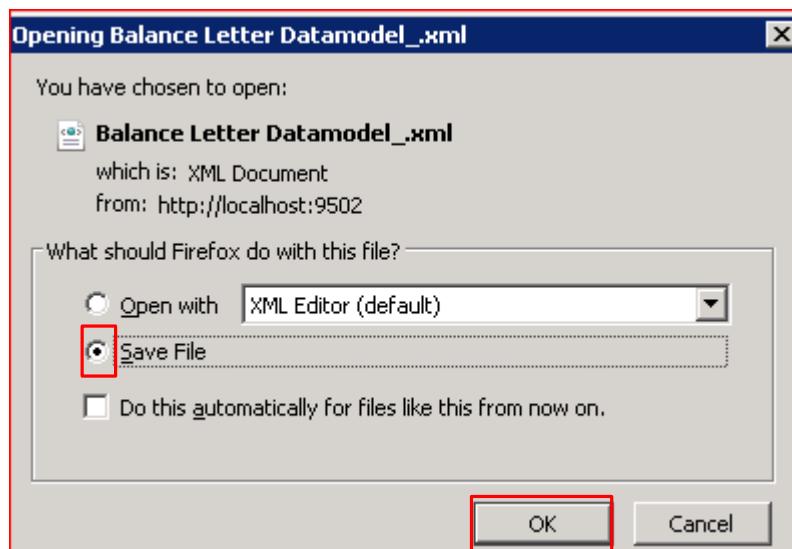
 ADDRESS_LINE4

 CITY (**Jacksonville**)

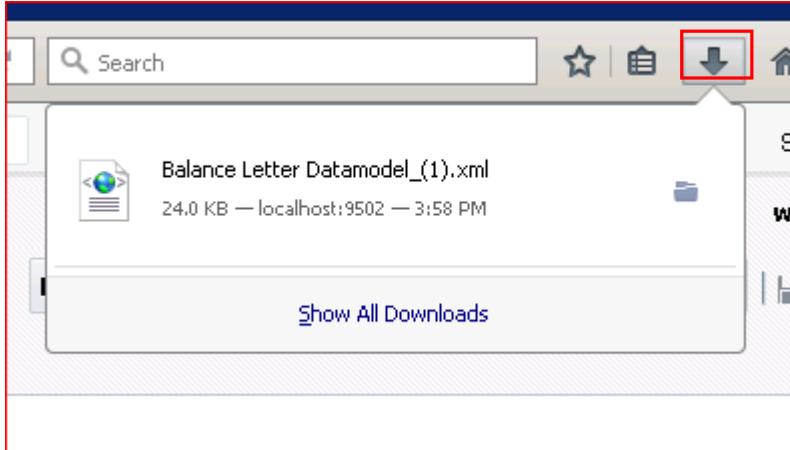
 STATE (**FL**)

 ZIP (**32209-1234**)

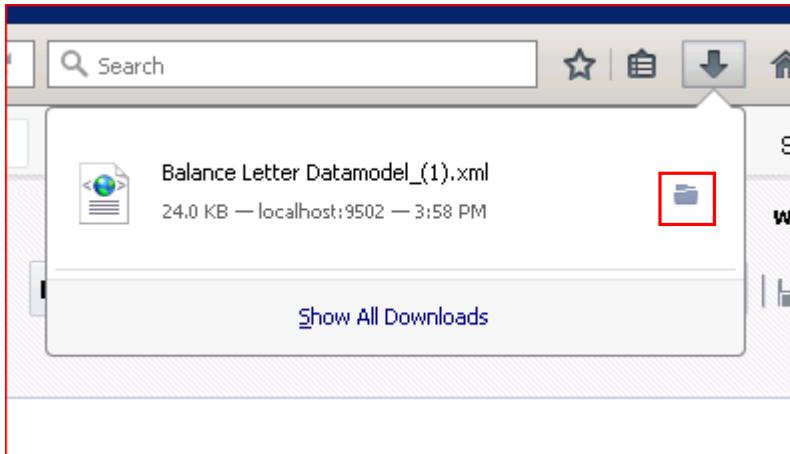
5. Select the Save File option. Click the OK button.



6. Click the Arrow at the top-right corner to display the saved file.



7. Click the Open Containing Folder icon to navigate to the Balance Letter Datamodel.xml saved file location.



8. Copy Balance Letter Datamodel.xml to the D:\Learn folder.
9. Open MS Word (Start > Programs > Microsoft Office > Microsoft Office Word 2007).
10. Select BI Publisher on the ribbon.



The BI Publisher menu bar contains several groupings that include Online, Load Data, Insert, Preview, Tools, and Options. 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. You use the Online grouping to connect to BI Publisher Server. For this practice, you work in disconnected mode.

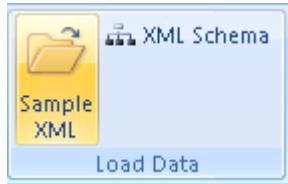
11. Click the MS Office button and click **Open**.



12. Navigate to D:\Learn and select Balance Letter Start.rtf.
13. Click **Open**. You often have a template from which to begin. The RTF template file appears in MS Word.



14. To build a report and view the report with data, you must load sample XML data. When working in disconnected mode, you must have sample data stored locally. Click **Sample XML** in the Load Data grouping (BI Publisher ribbon).



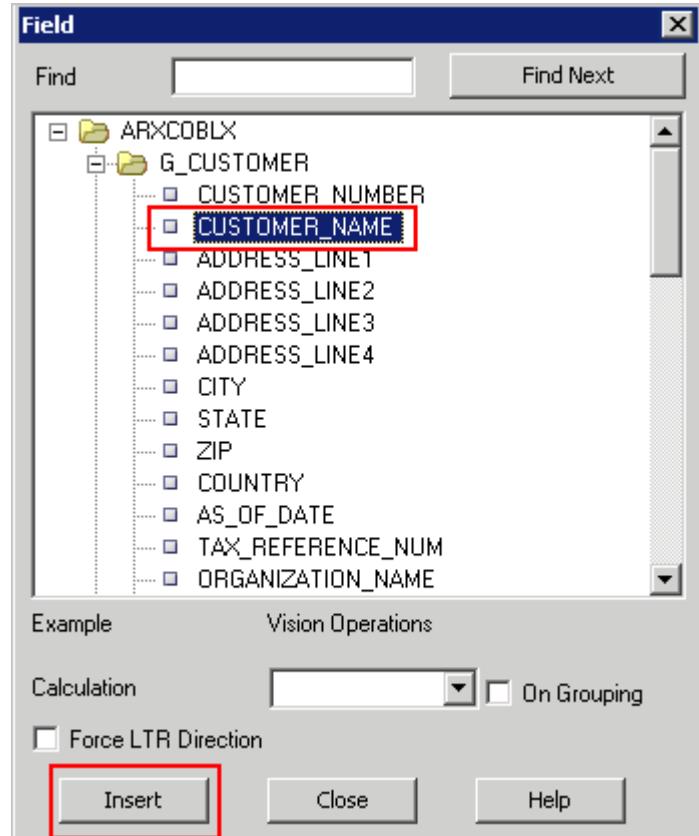
15. Select **Balance Letter Datamodel.xml** (located in the D:\Learn folder) and click **Open**.
16. Click **OK** in the message box confirming that you have successfully loaded the sample data.
17. The next step is to add fields to the Balance Letter by replacing the placeholders. Select the **<INSERT ADDRESS HERE>** placeholder and, in the Insert grouping, click **123 Field**.



The Field dialog box appears.

The screenshot shows the BI Publisher Field dialog box open over a template editor window. The template editor contains a letter with several placeholders: <INSERT ADDRESS HERE>, <INSERT AS OF DATE HERE>, <INSERT CURRENCY HERE>, <INSERT TABLE OF INVOICES HERE>, and <RECEIVABLES MANAGER>. The placeholder <INSERT ADDRESS HERE> is highlighted with a red box. The Field dialog box itself has a tree view of fields under 'AR&COBLX/G_CUSTOMER', including Customer Number, Customer Name, Address Lines 1-4, City, State, Zip, Country, As Of Date, Tax Reference Num, and Organization Name. The 'Calculation' dropdown is set to 'None' and the 'On Grouping' checkbox is unchecked. The 'Force LTR Direction' checkbox is also unchecked. Buttons for 'Insert', 'Close', and 'Help' are at the bottom.

18. Select **Customer Name** in the Field dialog box and click **Insert**.



The Customer Name form field appears in the Balance Letter. Click the space following the **CUSTOMER_NAME** form field to bring the focus back to the letter.



Press **Enter**. This adds a line break.

19. Repeat this process, adding **Address Line1**, **Address Line2**, **Address Line3**, and **Address Line4**. The letter should look like this:



20. Add **City** followed by a comma and a space, and then add **State** followed by a space. Finally, add **Zip**.



21. Insert the following fields into the letter, in the appropriate placeholders: **As_Of_Date**, **Trx Currency Code**, and **C Inv Open Balance**. Note that you may have to scroll in the Field dialog box to locate these fields.

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:

<INSERT TABLE OF INVOICES HERE>

Please confirm the above information.

Thanking you in advance, we remain.

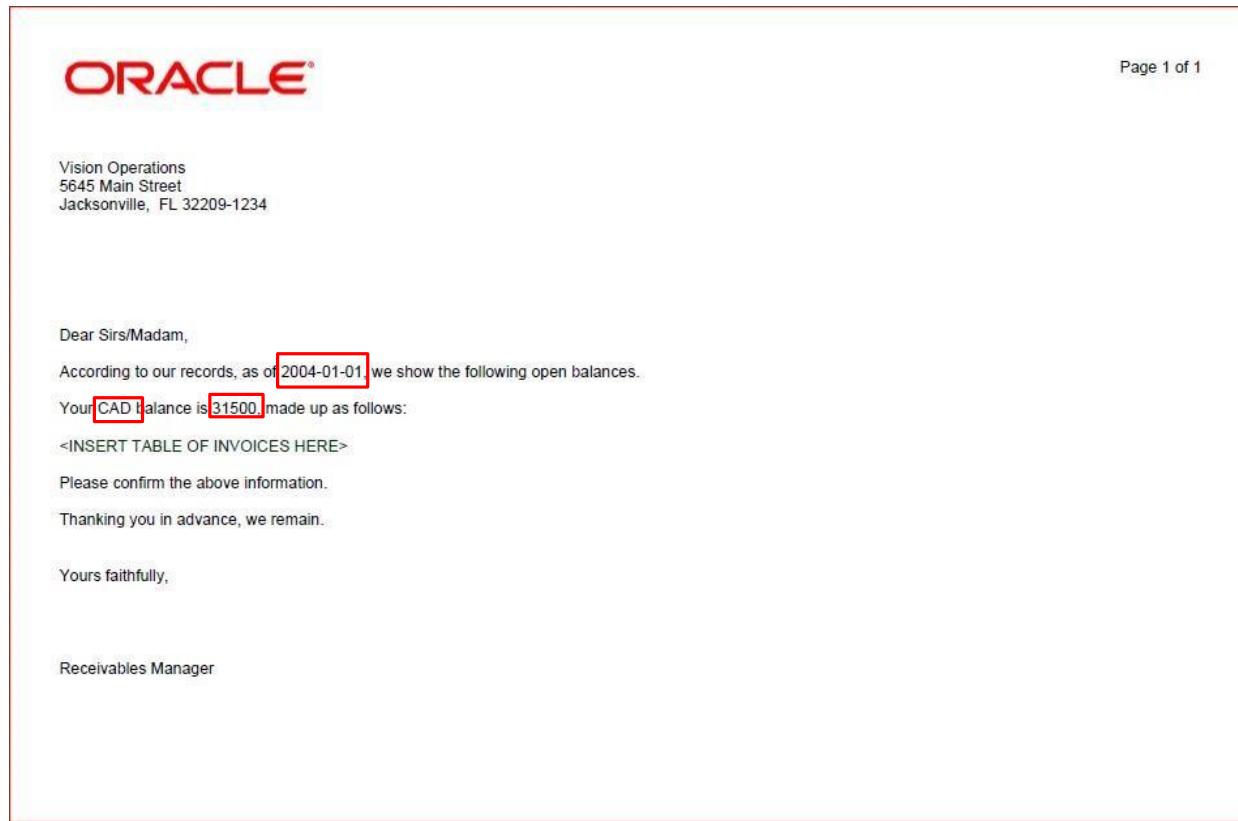
Yours faithfully,

Receivables Manager

22. Preview what you have added so far. Click **Close** in the Field dialog box. In the Preview grouping, click **PDF**.



The PDF Preview appears with the XML file data.

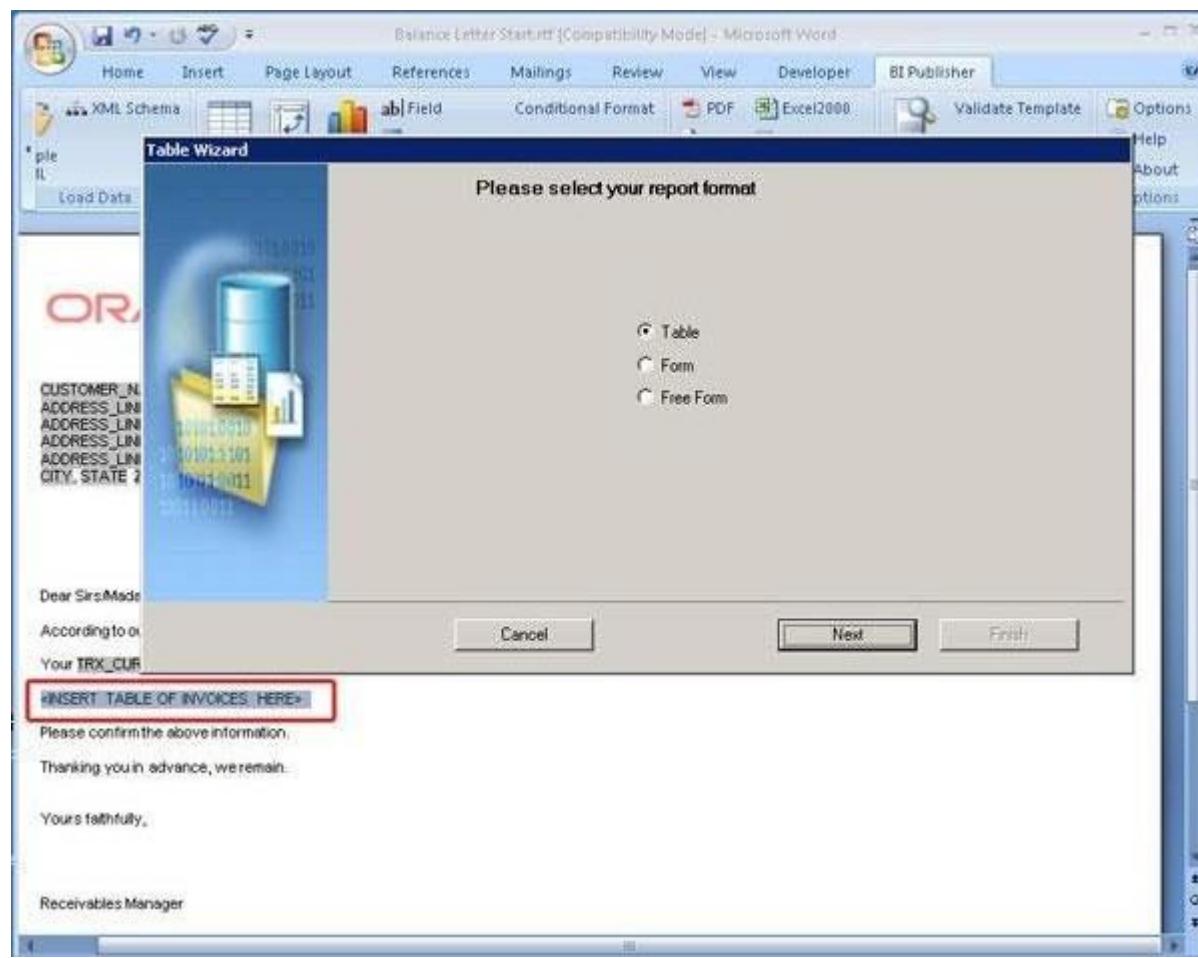


The PDF preview shows a formal letter from Oracle. At the top left is the red "ORACLE" logo. At the top right is the text "Page 1 of 1". Below the logo is the company address: "Vision Operations", "5645 Main Street", "Jacksonville, FL 32209-1234". The letter begins with "Dear Sirs/Madam,". It contains several redacted sections: a date placeholder "2004-01-01", a balance amount "31500", and a placeholder for "TABLE OF INVOICES HERE". The text continues with "According to our records, as of [redacted] we show the following open balances.", "Your [redacted] balance is [redacted] made up as follows:", and "Please confirm the above information.". It ends with "Thanking you in advance, we remain." and "Yours faithfully," followed by the signature "Receivables Manager".

23. The next step is to include the table of invoices by using the Table Wizard. The Table Wizard allows you to add tables, forms, charts, and other objects. Select the <INSERT TABLE OF INVOICE HERE> placeholder in the form letter. Click **Table Wizard** in the Insert grouping.



The Table Wizard appears.



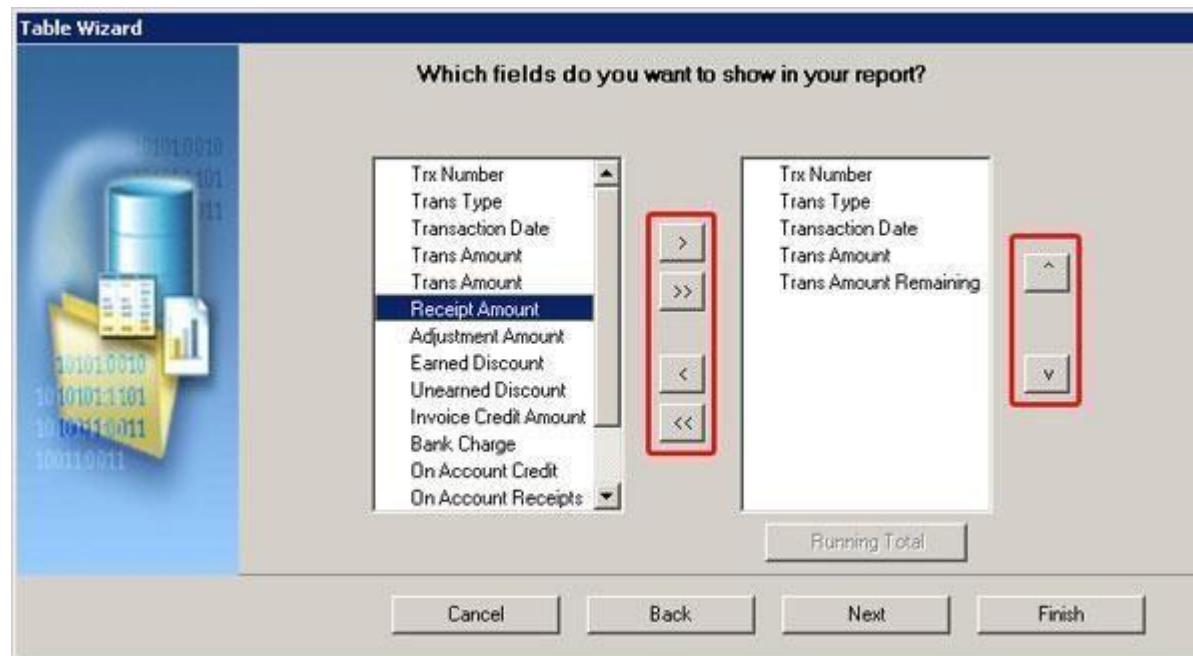
24. Accept the default (Table) and click **Next**.

25. The Table Wizard intuitively selects the correct dataset for you. You can change this, however, by clicking the drop-down list. Accept the default and click **Next**.



26. Select the columns that you want to see in the table. Select **Trx Number**, **Trans Type**, **Transaction Date**, **Trans Amount**, and **Trans Amount Remaining**.

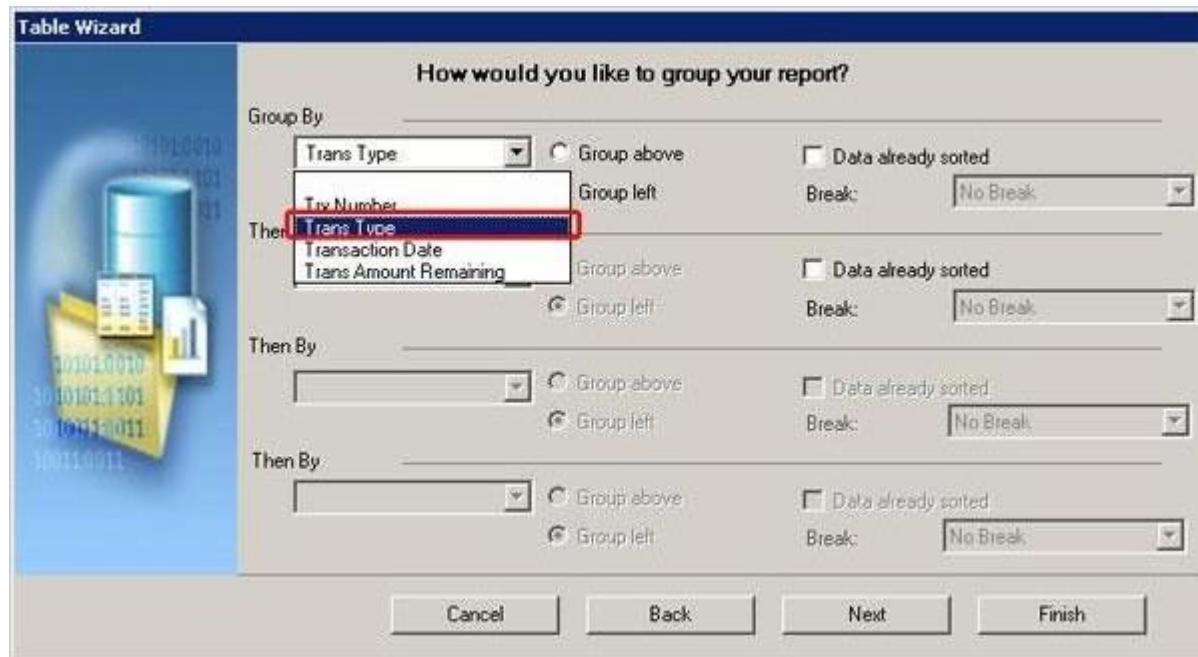
Use the shuttle icons () to move items to the selected column one at a time, or use the double-headed shuttle icons to move all columns at once. Use the resequence icons () to resequence the columns up and down.



Observe that you can also add a running total to this report.

27. Click **Next**.

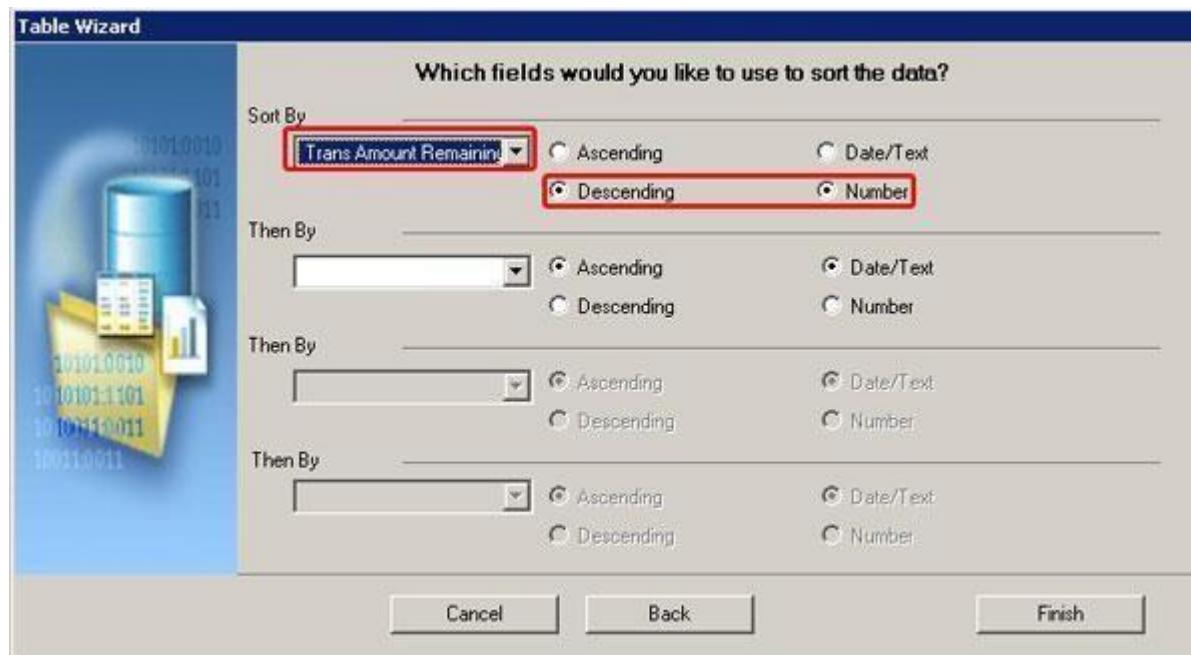
28. You can group your data. From the Group By drop-down list, select **Trans Type** and then select **Group left**.



You use the Break option to insert either a page break or section break after each occurrence of a group.

Click **Next**.

29. Select a sort sequence and indicate the type of data that is being sorted. Select **Trans Amount Remaining**, indicate that this field is a **Number**, and sort the column in **Descending** order.



Click **Finish**.

30. The table appears in your letter. Note the "G (grouping)" and "F-E (for-each)" codes in the table.

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:

Trans Type	Trx Number	Transaction Date	Trans Amount	Trans Amount Remaining
G/FTRANS_TYPER	FTRX_NUMBER	TRANSACTION_DATE	TRANS_AMOUNT	TRANS_AMOUNT_Remaining

Please confirm the above information.

Thanking you in advance, we remain,

Yours faithfully,

31. Preview your letter once again in **PDF** format.

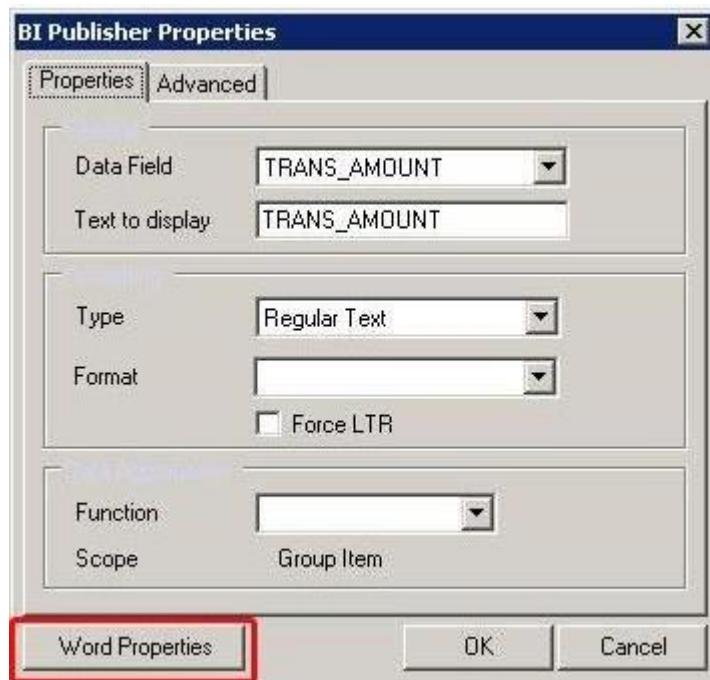
The PDF preview shows a letter from Vision Operations, 5645 Main Street, Jacksonville, FL 32209-1234. The letter is addressed to 'Dear Sirs/Madam' and states that as of 2004-01-01, the open balances are CAD 31500. A table lists transactions from December 2003 to January 2004, showing the transaction type, number, date, amount, and remaining balance.

Trans Type	TRX_NUMBER	TRANSACTION_DATE	TRANS_AMOUNT	TRANS_AMOUNT_REMAINING
Standard	10020522	2003-12-09	281904.71	281904.71
	10020407	2003-12-04	223563.03	223563.03
	10020408	2003-12-04	176353.55	176353.55
	10020548	2003-12-10	176353.55	176353.55
	10020403	2003-12-04	172482.45	172482.45
	10020523	2003-12-09	160505.87	160505.87
	10020658	2003-12-16	160505.87	160505.87
	10020622	2003-12-15	155449.04	155449.04
	10020404	2003-12-04	147740.25	147740.25
	10020520	2003-12-09	147740.25	147740.25
	10020657	2003-12-16	147740.25	147740.25
	10020319	2003-11-26	147328.21	147328.21
	10020402	2003-12-04	146776.07	146776.07
	10020591	2003-12-12	146776.07	146776.07
	10019903	2003-11-18	132733.84	132733.84
	10020280	2003-11-24	128654.96	128654.96
	10020310	2003-11-25	120653.2	120653.2
	10020487	2003-12-05	112902.54	112902.54
	10020592	2003-12-12	112902.54	112902.54

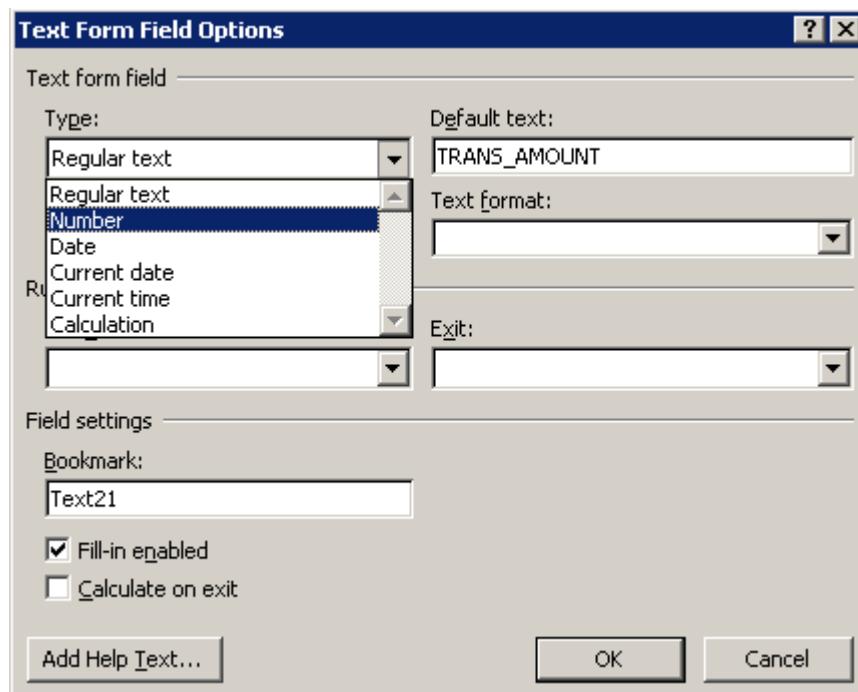
Close the PDF.

32. You can view the properties of any table field that you added to your template. Select **TRANS_AMOUNT** in the table, and double-click to view the properties.

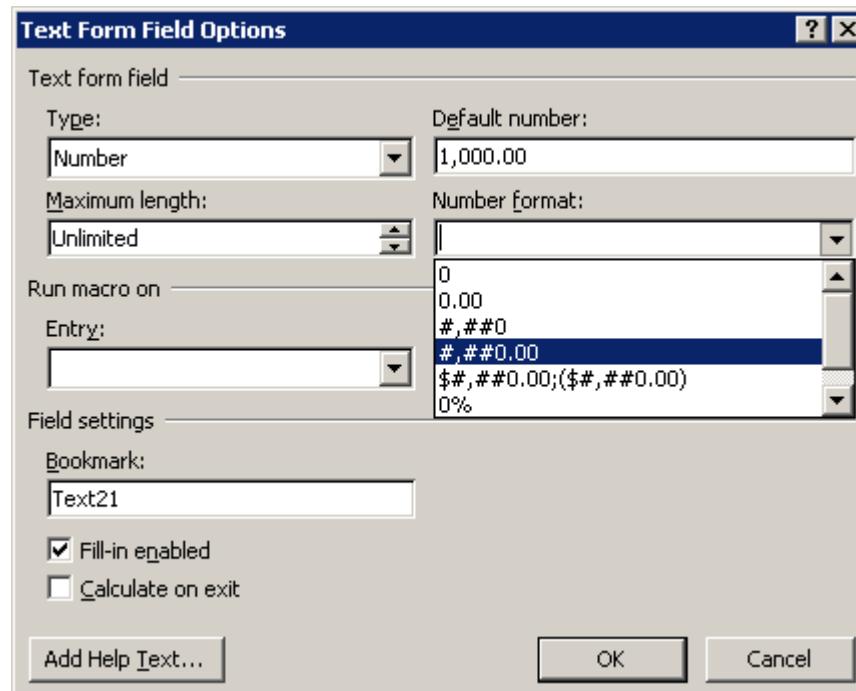
Click **Word Properties** in the BI Publisher Properties dialog box.



33. Select **Number** from the Type drop-down list.



34. Set the “Default number” and “Number format.” Enter **1,000.00** in the “Default number” text box and select **#,##0.00** from the “Number format” drop-down list.



35. Click **OK**. The Balance Letter and applied formatting appear.

Trans Amount
1,000.00

36. Format **Trans Amount Remaining** exactly the same way. You can also format the date field if you choose.
37. Preview your changes in PDF and save the file in the D:\Learn directory.
38. Leave MS Word open.

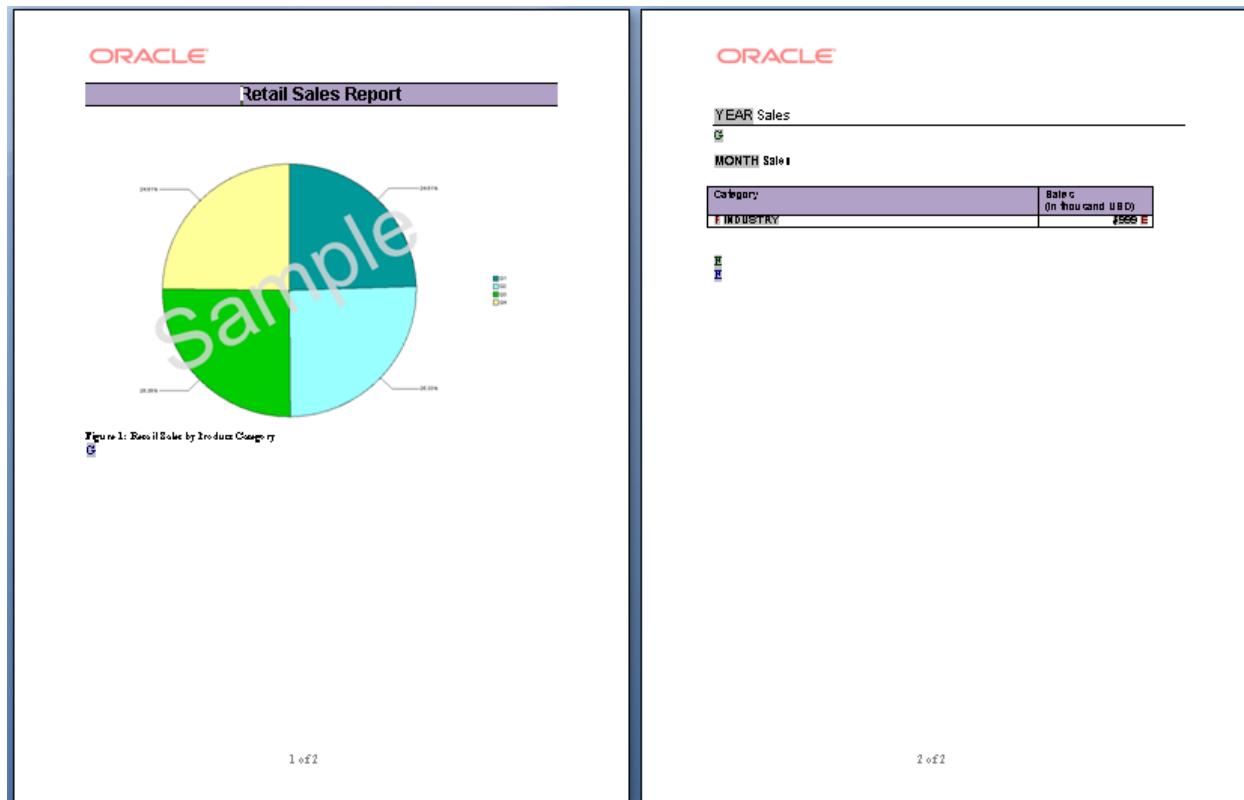
Practice 7-2: Working with a Chart and a Pivot Table in an RTF Template

Overview

In this practice, you open an existing RTF template. Then you insert, define, and preview a chart, and add a pivot table to the template.

Tasks

1. Copy the **Retail Sales.rtf** and **RetailSales.xml**. These files are located in **D:\Program Files (x86)\Oracle\BI Publisher\BI Publisher Desktop\Template Builder for Word\samples\RTF templates\Sales Report** to the **D:\Learn** directory.
2. Open **Retail Sales.rtf**. The file looks like this. From the BI Publisher menu, select **Sample XML** in the Load Data grouping.

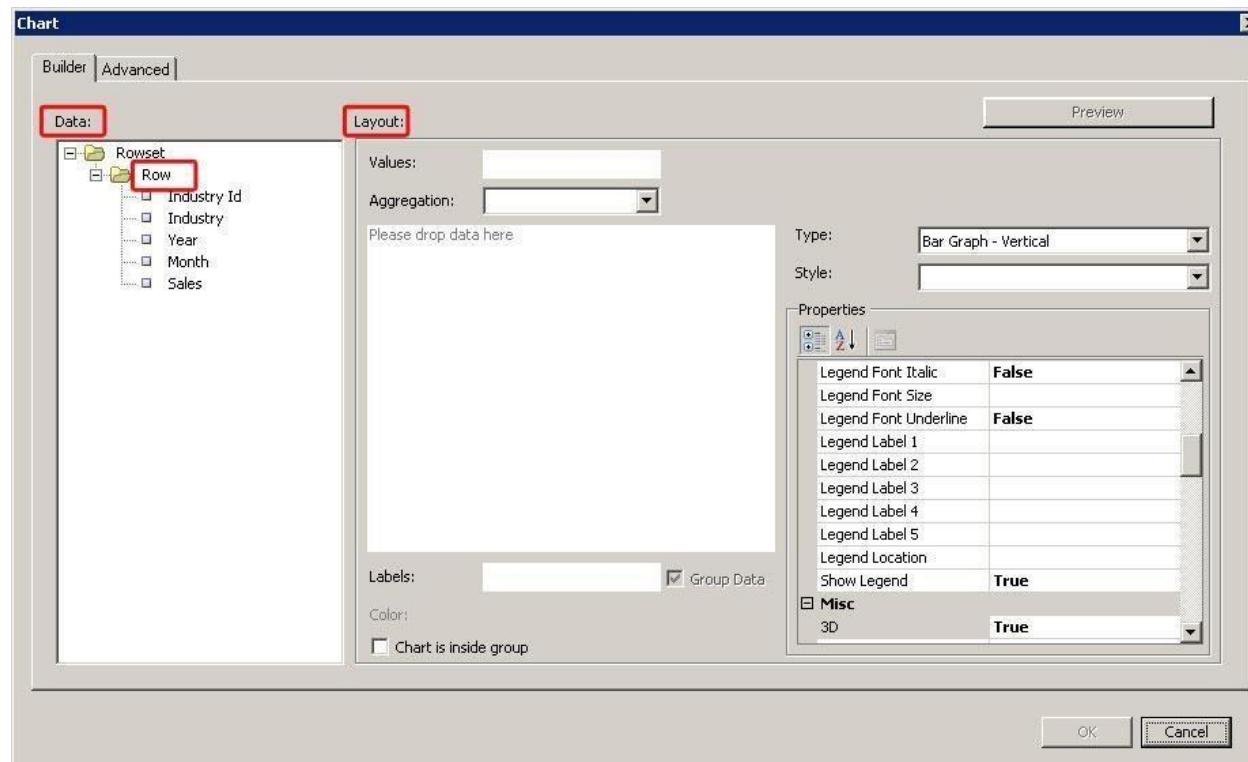


3. Navigate to and select **RetailSales.xml** (located in **D:\Learn**), and click **Open**. This file contains retail sales data from different industries.
4. Click **OK** in the message dialog box.

5. This template contains both a sample chart and a data table (scroll to view the table). Select the chart in the template and press **Delete**.



6. On the BI Publisher ribbon, click **Chart** in the Insert grouping. The Chart dialog box appears.

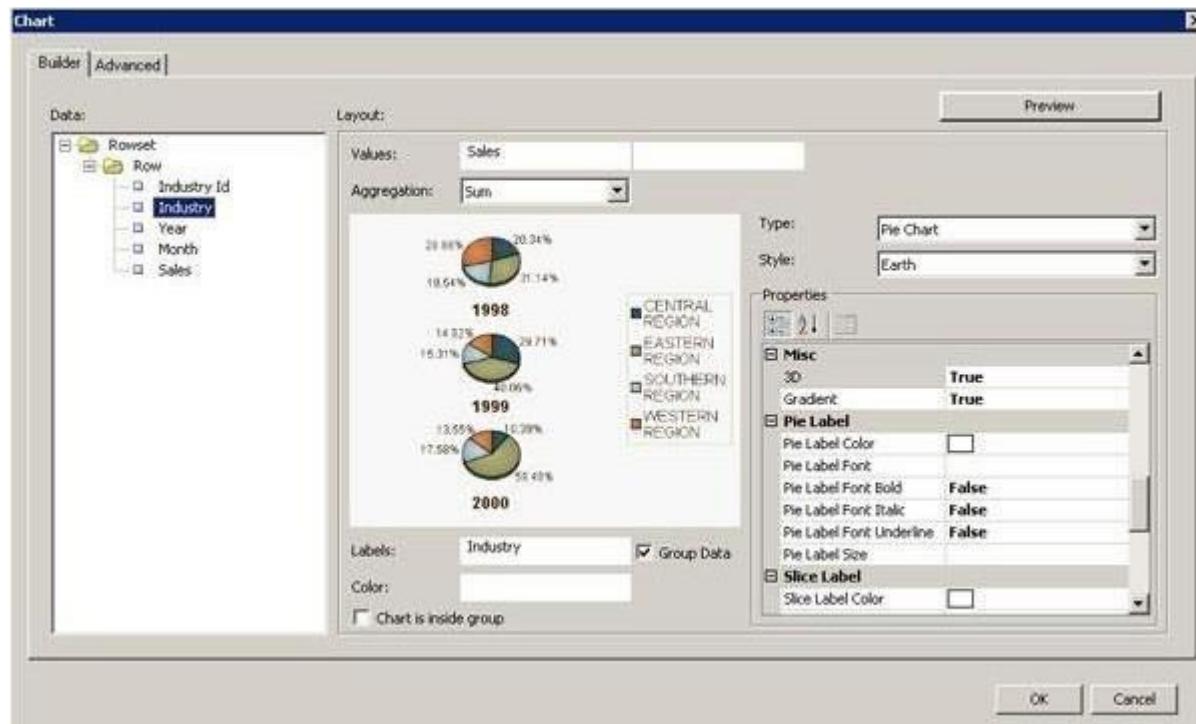


7. Select **Row** in the Data pane.
8. In the Layout pane, select the following information:

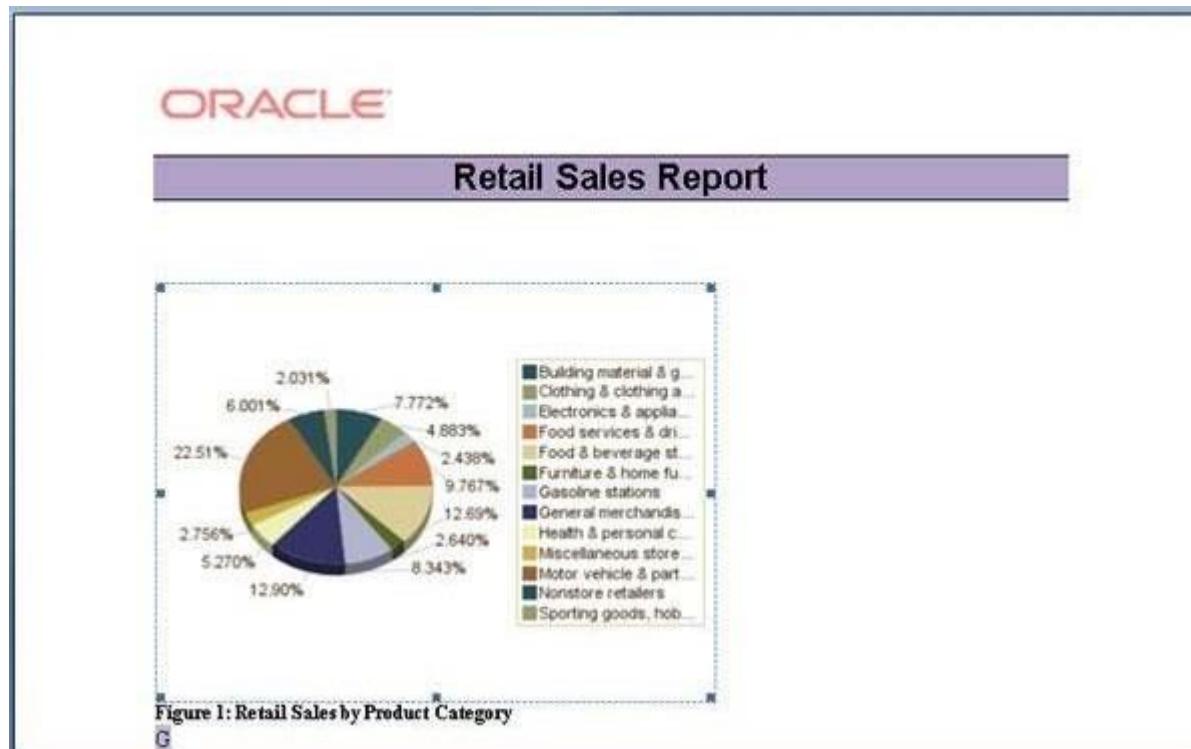
Step	Attribute	Choices or Values
a.	Type	Pie Chart
b.	Style	Earth
c.	Aggregation	SUM
d.	Properties – Misc	3D = True
e.	Properties – Misc	Gradient = True

9. Drag **Sales** to Values in the Layout pane.
10. Drag **Industry** to the Labels text box.

Your chart should look like this:



11. Click **OK**. The chart appears in the template:

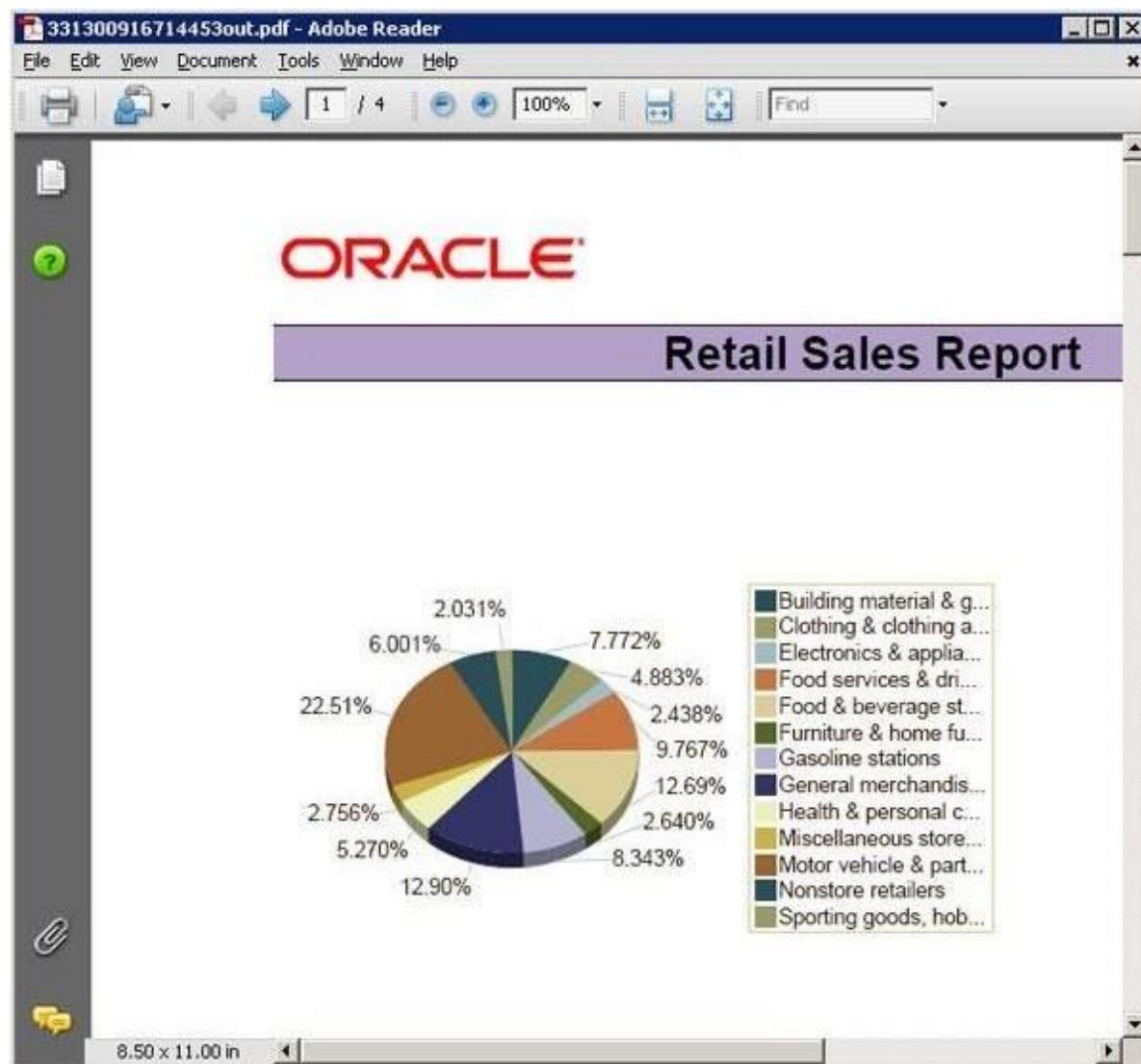


12. Save this as **My Retail Sales** in the **Learn** folder.

13. In the Preview grouping, click **PDF**.



The PDF appears in a new browser window.



Scroll down and examine the table.

The screenshot shows a PDF document titled "411300917494750out.pdf" in Adobe Reader. The document features the Oracle logo at the top. Below it, the title "2006 Sales" is displayed, followed by "March Sales". A table lists sales data for various categories in March. The table has two columns: "Category" and "Sales (in thousand USD)". The data includes: Motor vehicle & parts dealers (\$73,458), Furniture & home furnishings stores (\$8,655), Electronics & appliance stores (\$7,762), Building material & garden eq. & supplies dealers (\$25,385), Food & beverage stores (\$40,854), Health & personal care stores (\$16,977), Gasoline stations (\$25,167), Clothing & clothing accessories stores (\$15,917), Sporting goods, hobby, book & music stores (\$6,592), General merchandise stores (\$41,492), Miscellaneous store retailers (\$8,781), Nonstore retailers (\$18,353), and Food services & drinking places (\$31,164). The table is followed by "February Sales" and another table with partial data for Motor vehicle & parts dealers (\$71,564) and Furniture & home furnishings stores (\$8,418). The Adobe Reader interface is visible, including the toolbar and status bar.

Category	Sales (in thousand USD)
Motor vehicle & parts dealers	\$73,458
Furniture & home furnishings stores	\$8,655
Electronics & appliance stores	\$7,762
Building material & garden eq. & supplies dealers	\$25,385
Food & beverage stores	\$40,854
Health & personal care stores	\$16,977
Gasoline stations	\$25,167
Clothing & clothing accessories stores	\$15,917
Sporting goods, hobby, book & music stores	\$6,592
General merchandise stores	\$41,492
Miscellaneous store retailers	\$8,781
Nonstore retailers	\$18,353
Food services & drinking places	\$31,164

Category	Sales (in thousand USD)
Motor vehicle & parts dealers	\$71,564
Furniture & home furnishings stores	\$8,418

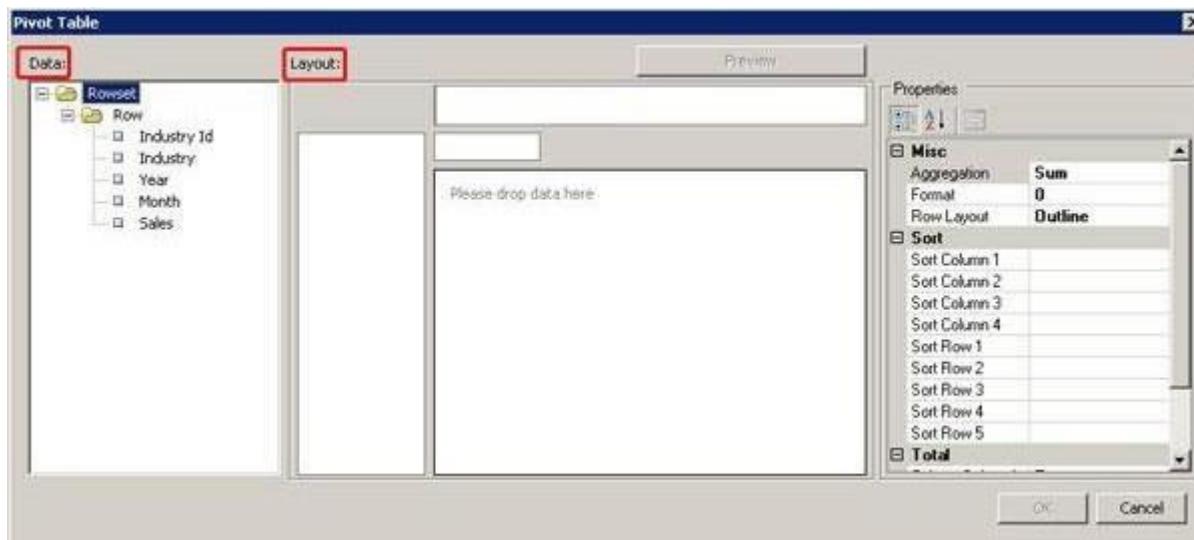
Close the browser window.

14. Scroll down in the template, and then position your cursor after the end of the last form field (on page two) and press **Enter** twice.

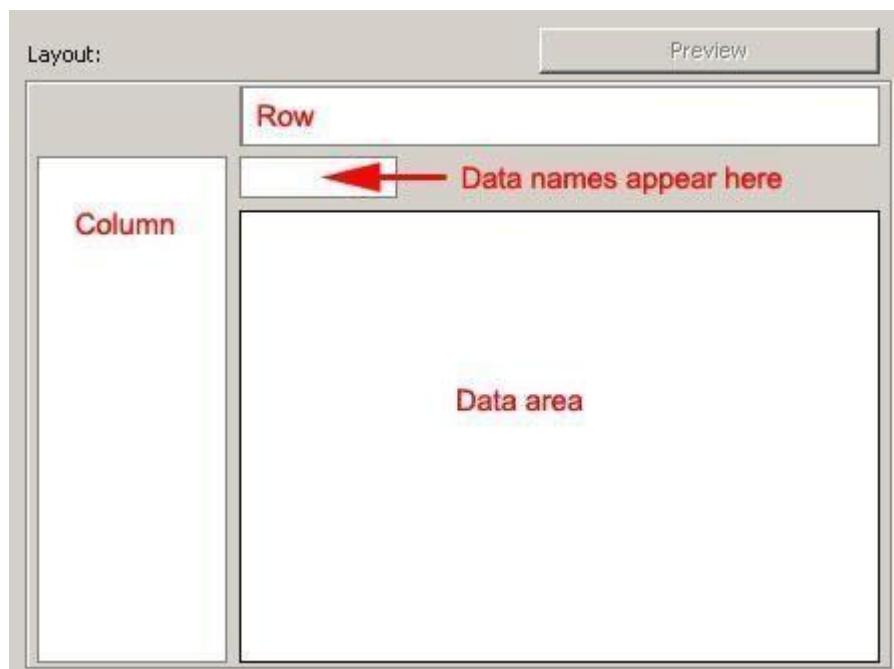
The screenshot shows the RTF Template Builder interface. At the top, there are tabs for 'Online' and 'Load Data'. Below the tabs, there is a section labeled 'YEAR Sales' containing a single letter 'G'. Underneath it is another section labeled 'MONTH Sales' containing a single letter 'E'. A table follows, with a red box highlighting the first column. The table has two rows: the first row contains a header 'Category' and a column label 'Sales (in thousand USD)'; the second row contains a value 'F INDUSTRY' and a value '\$999 E'. There are also some other letters ('E', 'E', 'I') scattered in the template area.

15. Click **Pivot Table** in the Insert grouping.

16. The Pivot Table dialog box appears.



You drag data columns from the Data pane to the blank Layout pane on the right to build a pivot table.



17. Perform the following tasks:

Step	Begin Action	End Action
a.	Drag Year	To Column
b.	Drag Month (below Year)	To Column
c.	Drag Industry	To Row
d.	Drag Sales	To "Please drop data here" area
e.	Select Sales and then select the cell to the right of Format in the Properties pane.	Select #,##0 <p>The Properties pane shows the 'Format' dropdown set to '#,##0'. Other options include 'Sum' (selected), '0', '0.00', '#,##0.00', '0%', and '0.00%'. The 'Format' option is highlighted in blue.</p>

SUM is the default aggregation for the Sales measure. You use the Properties pane to change the aggregation method, add formatting, and so forth.

18. Click **OK**. The pivot table appears in the template.

YEAR Sales		
MONTH Sales		
Category	Sales (in thousand USD)	
F INDUSTRY	\$999 E	
 E E		
CH ACC	G INDUSTRY E	Total
G YEAR	G 999E	999
B G MONTH	G 999E	999E
	G 999E	999

Note: You can change the formatting of the pivot table by using MS Word. However, if you need to change the structure, delete the existing pivot table, and build a new one, the creation and editing of pivot tables is better handled in the Layout Editor than in MS Word. MS Word templates are better suited to “document style” templates.

19. Save the template and then click **PDF** in the Preview grouping to view your pivot table.



Category	Sales (in thousand USD)
Furniture & home furnishings stores	\$8,805
Electronics & appliance stores	\$8,114
Building material & garden eq. & supplies dealers	\$26,480
Food & beverage stores	\$42,553
Health & personal care stores	\$17,727
Gasoline stations	\$28,723
Clothing & clothing accessories stores	\$16,316
Sporting goods, hobby, book & music stores	\$8,696
General merchandise stores	\$43,336
Miscellaneous store retailers	\$9,314
Nonstore retailers	\$20,707
Food services & drinking places	\$32,852

	Building material & garden eq. & supplies dealers	Clothing & clothing accessories stores	Electronics & appliance stores	Food & beverage stores
2006	48,531	31,528	15,472	81,303
	February	23,146	15,611	7,710
	March	25,385	15,917	7,762
2007	79,625	48,991	24,726	127,991
	February	26,369	16,497	8,320
	January	26,480	16,316	8,114
	March	26,776	16,178	8,292
	128,156	80,519	40,198	209,294

20. Close MS Word.

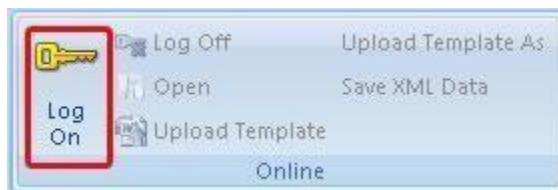
Practice 7-3: Designing an RTF Template for a BI Publisher Report in Connected Mode

Overview

Previously, you created an RTF template for a report that uses sample XML data. In this practice, you design an RTF template for a report created in BI Publisher. You log in to BI Publisher through Template Builder, define an RTF template, add a table with a running total, add grouping and sorting, add a page break, add a chart, preview data in the report by using the template, upload the RTF template to BI Publisher Enterprise Server, and view the report on BI Publisher Enterprise Server.

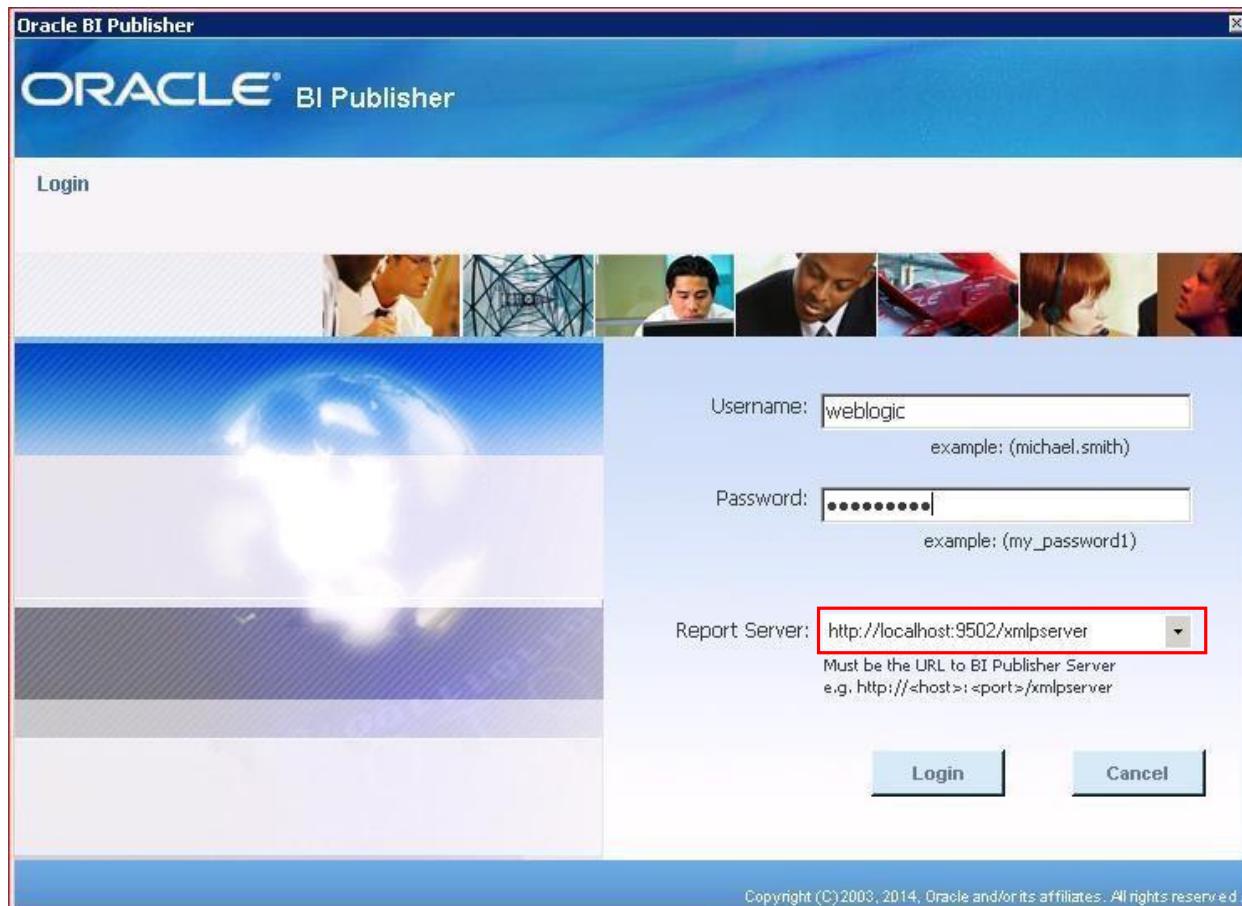
Tasks

1. Open MS Word.
2. In the Online grouping, click **Log On**.



3. The BI Publisher Login window appears. The first time you connect to BI Publisher from MS Word, you may be asked for the report server URL. Subsequently, this text box will be populated for you. Enter the following information:

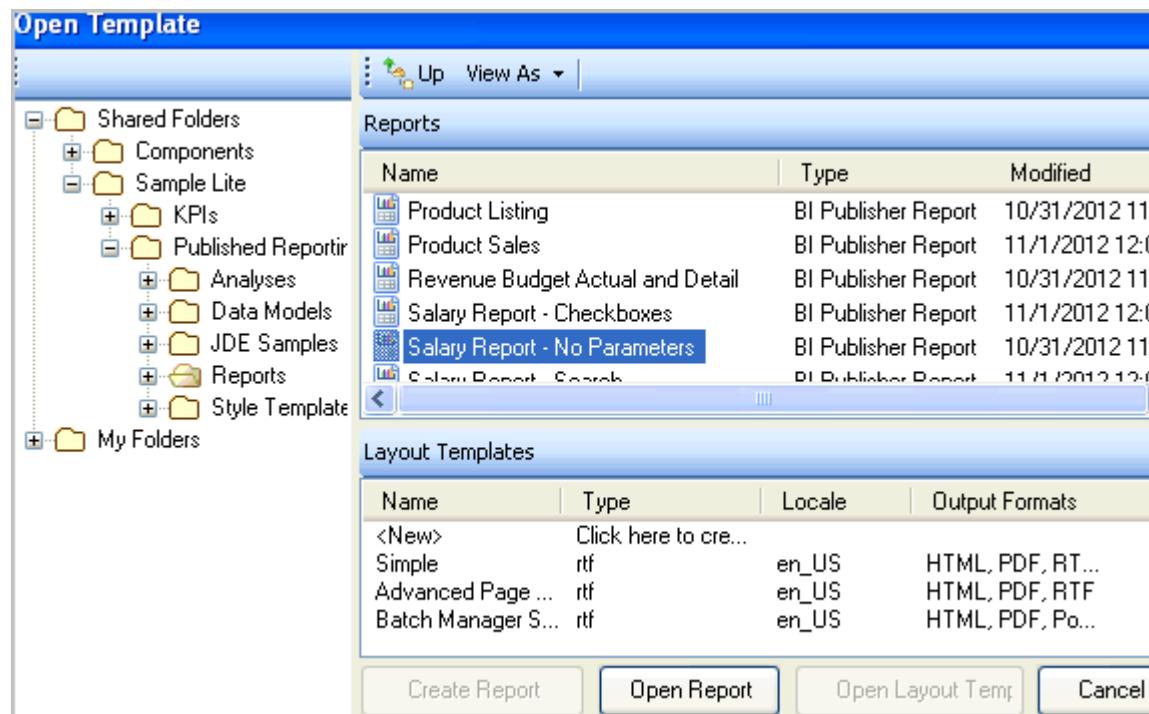
Step	Attribute	Values
a.	Username	Ask the instructor for your username. (Example: weblogic1)
b.	Password	Ask the instructor for your password. (Example: weblogic1)
c.	Report Server	http://localhost:9502/xmlpserver



4. Click **Login**. The **Open Template** dialog box appears.

You can select a report from either Shared Folders or My Folders. After the folder is selected in the Catalog pane on the left, the reports associated with that Catalog folder appear in the Reports pane. To edit an existing template that is stored in the Catalog, select the template from the Layout Templates pane.

5. Select \Shared Folders\Sample Lite\Published Reporting\Reports\ and then double-click **Salary Reports – No Parameters** from the Reports pane.



When the report opens, you will not see any data in the blank MS Word document; however, XML data definitions are loaded from the report to facilitate the definition of a template. Notice that the report name appears in the title bar of MS Word beside the document name.

6. Begin to build the template. Click **Table Wizard** in the Insert grouping. (This was practiced earlier in disconnected mode.) The “Please select your report format” page appears.
7. Accept **Table** as the default and click **Next**.
8. Accept the default data set on the “Which grouping field do you want to report on?” page and click **Next**.

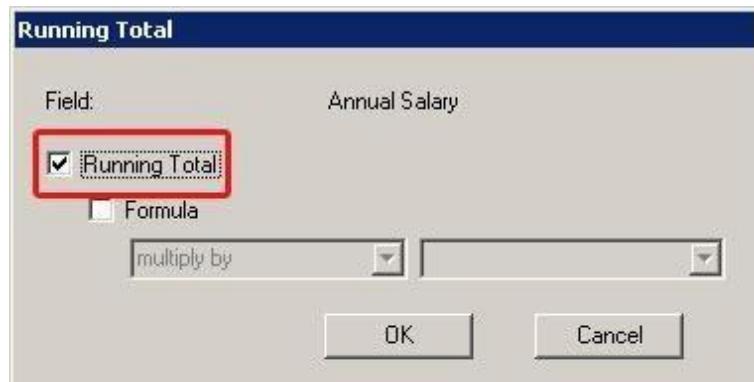
9. Select **Manager**, **Department Name**, **Name**, **Annual Salary**, and **Fed Withheld** (in the specified sequence). Your selections should be listed in the right pane of the wizard page.

Note that you can use the resequencing arrows (↑ ↓) to rearrange the fields.



10. Select **Annual Salary** and then click **Running Total**. The Running Total dialog box appears.

Select the **Running Total** check box and click **OK**.



Annual Salary is annotated with the running total icon (R).



11. Click **Next**. Perform the following tasks on the “How would you like to group your report?” page:

Step	Task	Selection
a.	Group By	Department Name and Group above
b.	Break	Section A section break starts the next group on a new page, resets page numbering, headers and footers, and any running calculations for each occurrence of the group.



Click **Next**.

12. Sort by **Manager** on the “Which fields would you like to use to sort the data?” page. Click **Finish**.



13. The table appears in the document.

RTV								
group ROW by DEPARTMENT_NAME								
DEPARTMENT_NAME								
<table border="1"><thead><tr><th>Manager</th><th>Name</th><th>Running Total Annual Salary</th><th>Fed Withheld</th></tr></thead><tbody><tr><td>FMANAGER</td><td>NAME</td><td>Running_Total_ANNUAL_SALARY</td><td>FED_WITHHELD</td></tr></tbody></table>	Manager	Name	Running Total Annual Salary	Fed Withheld	FMANAGER	NAME	Running_Total_ANNUAL_SALARY	FED_WITHHELD
Manager	Name	Running Total Annual Salary	Fed Withheld					
FMANAGER	NAME	Running_Total_ANNUAL_SALARY	FED_WITHHELD					
end ROW by DEPARTMENT_NAME								

14. Add a chart. Position your cursor after the “end ROW by DEPARTMENT_NAME” form field and press **Enter** twice.
15. In the Insert grouping, click **Chart**.
16. Select **Row** in the Data pane.
17. Drag **Annual Salary** to Values in the Layout pane.
18. Drag **Manager** to the Labels text box.
19. In the Layout pane, select the following:

Step	Attribute	Choices or Values
a.	Type	Bar Graph - Vertical
b.	Style	Earth
c.	Aggregation	Average
d.	Properties: Misc - 3D	True
e.	Properties: Misc - Gradient	True
f.	Title: Title	Avg. Annual Salary by Manager
g.	Title: Title Color	Navy
h.	Title: Title Font Bold	True
i.	Title: Title Size	12
j.	X-Axis Label: X-Axis Label Color	Black
k.	X-Axis Title: X-Axis Title	Manager
l.	X-Axis Title: X-Axis Title Color	Navy
m.	Y1-Axis Label: Y-Axis Label Color	Black
n.	Y1-Axis Title: Y1-Axis Title	Avg. Annual Salary
o.	Y1-Axis Title: Y-Axis Title Color	Navy

Step	Attribute	Choices or Values
p.	Chart is inside group	Select the check box.

20. The Chart Wizard should look like this:

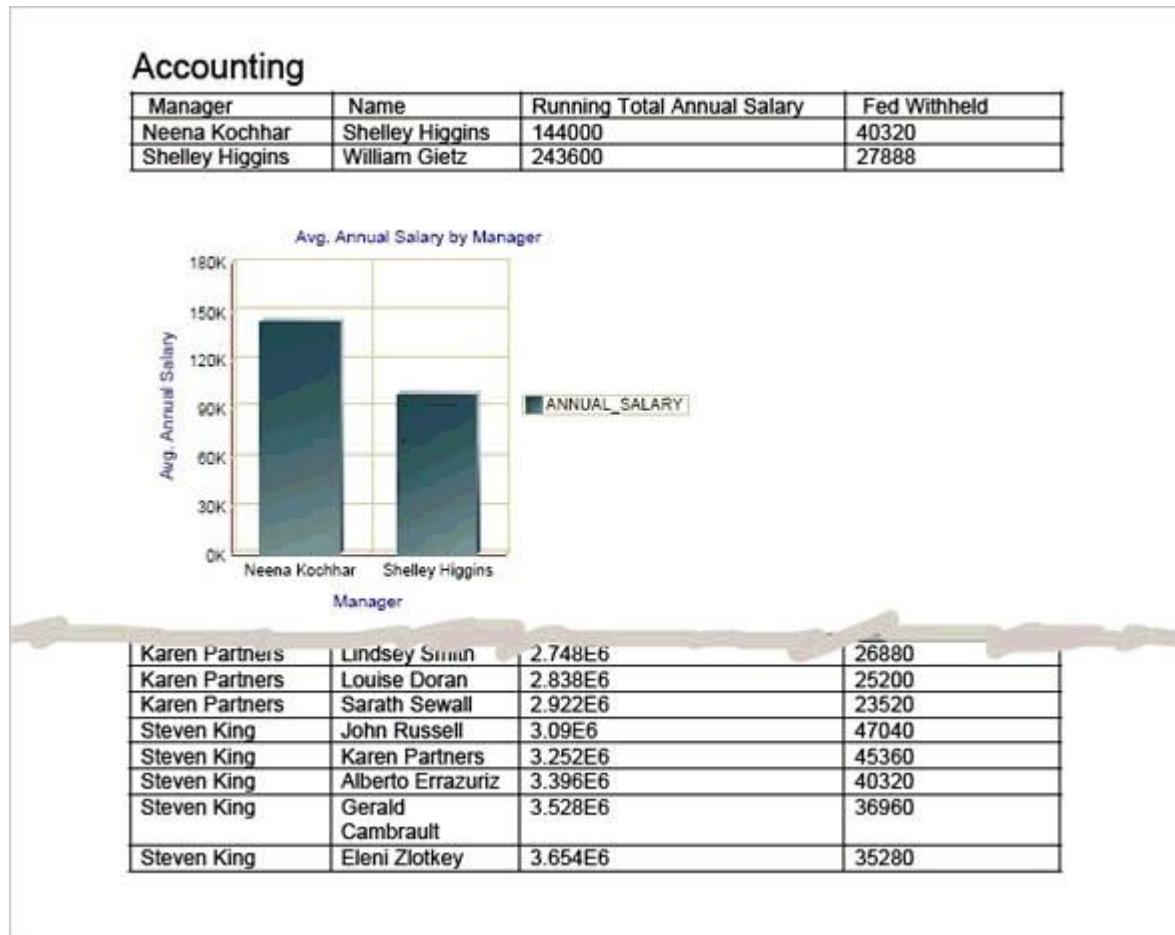


21. Click **OK**. The chart appears in the template.

Hint: To edit the chart, select it and then click Chart on the toolbar again.

22. In the Preview grouping, click **PDF**. You are prompted to save the file as an RTF file before previewing. Save the file as **Manager Financials Report.rtf** in your **Learn** folder.

The PDF appears. Notice that you used the “Group above” option; therefore, the department name appears above the table. Also note that a chart appears for each department name.



23. Close the PDF.
24. Close MS Word.
25. Log in to BI Publisher Enterprise Edition.

26. On the Catalog page, navigate to the “Salary Report – No Parameters” report and click **Edit**.

The screenshot shows the Oracle BI Publisher Enterprise interface. The top navigation bar includes 'Search All', 'Administratio...', 'Home', 'Catalog', 'New', and 'Open'. The main area is titled 'Catalog' with a 'Location' dropdown set to '/Shared Folders/Sample Lite/Published Reporting/Reports'. On the left, there's a sidebar with 'Folders' containing 'Data Models', 'JDE Samples', 'Reports' (which is selected), 'Style Templates', 'Sample Reports', and 'VA Projects'. Below that is a 'Tasks' section with 'Reports' options like 'Expand', 'Upload', 'Delete', 'Download', 'Copy', 'Cut', 'Paste', and 'Rename'. The main content area lists several reports: 'Product Listing', 'Product Sales - OBIEE Semantic Layer', 'Salary Report - Checkboxes', 'Salary Report - No Parameters' (which has a red box around its 'Edit' link), and 'Salary Report'. Each report entry includes a 'More' dropdown.

27. The Report Editor appears. Click **Add New Layout**.

The screenshot shows the report editor for 'Salary Report - No Parameters'. The top navigation bar includes 'Home', 'Catalog', 'New', 'Signed In As weblogic', and a 'Parameters' tab. The main area displays five layout thumbnails: 'Simple', 'Advanced Page Totals', 'Batch Manager Salary', 'W-2 2010 (Partial)', and 'Manager Summary'. Below each thumbnail are 'Edit', 'Properties', and 'Delete' links. To the right of the thumbnails is a toolbar with 'View Thumbnails' and 'View a list' buttons, and a prominent 'Add New Layout' button, which is highlighted with a red box.

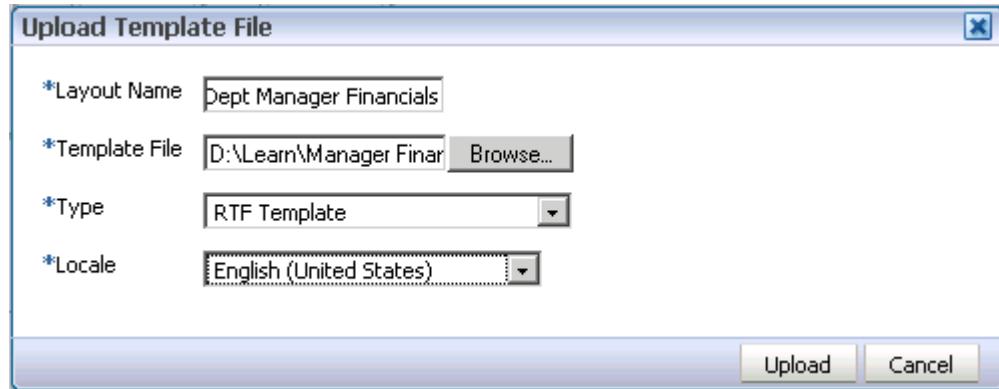
28. Report Editor displays the options for new layouts.

The screenshot shows the Oracle BI Publisher Enterprise interface. At the top, it says "ORACLE BI Publisher Enterprise". There is a search bar with "Search All". Below that, the title is "Salary Report - No Parameters". Under "Data Model", it says "Salary Report Data Model" with a magnifying glass icon and a plus sign. There are four layout options: "Blank (Portrait)", "Blank (Landscape)", "Header and Footer (Portrait)", and "Header and Footer (Landscape)". Below these are "Shared Templates" for "Chart", "Table", "Chart and Table", "Dashboard", "iPhone", and "Oracle Head Foot (Portrait)". At the bottom, there is a section titled "Upload or Generate Layout" with two buttons: "Upload" (with a green arrow icon) and "Generate" (with a gear icon).

Click **Upload**.

29. In the Upload Template File dialog box, enter **Dept Manager Financials** as the layout name.
30. Click **Browse**.
31. Navigate to and select **Manager Financials Report.rtf**, and click **Open**.

32. Select RTF Template as Type and English (United States) as Locale.



33. Click **Upload**.

34. Click **Save**. The uploaded template is listed in the Report Editor window.

A screenshot of the "Salary Report - No Parameters" report editor window. The window has a red border around its main content area. At the top left, there are navigation links: "Data Model" (highlighted in blue), "Salary Report Data Model", a magnifying glass icon for search, and a plus sign icon for adding new items. At the top right, there is a "Home" link. The main content area displays five report templates arranged in two rows:

- Simple**: Represented by a small icon showing a bar chart and a grid. Below it are "Edit | Properties | Delete" links.
- Advanced Page Totals**: Represented by a small icon showing a bar chart and a grid with totals. Below it are "Edit | Properties | Delete" links.
- Batch Manager Salary**: Represented by a small icon showing a bar chart and a grid. Below it are "Edit | Properties | Delete" links.

- Dept Manager Financials**: Represented by a larger, more detailed icon showing multiple charts and tables. Below it are "Edit | Properties | Delete" links.

35. Click **View Report**. In Report Viewer, click the **Dept Manager Financials** tab.

Salary Report - No Parameters

Home Catalog New Open Signed In As weblogic

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

Accounting

MANAGER	NAME	Running Total Annual Salary	FED_WITHHELD
Neena Kochhar	Shelley Higgins	144000	40320
Shelley Higgins	William Gietz	243600	27888

Avg. Annual Salary by Manager

The chart displays the average annual salary for two managers: Neena Kochhar and Shelley Higgins. The y-axis represents the average annual salary in thousands of dollars, ranging from 0K to 180K. The x-axis lists the managers' names. Neena Kochhar has a higher average annual salary than Shelley Higgins.

Manager	Avg. Annual Salary (K)
Neena Kochhar	144
Shelley Higgins	122

Practice 7-4: Building an RTF Template by Using an Existing Data Model

Overview

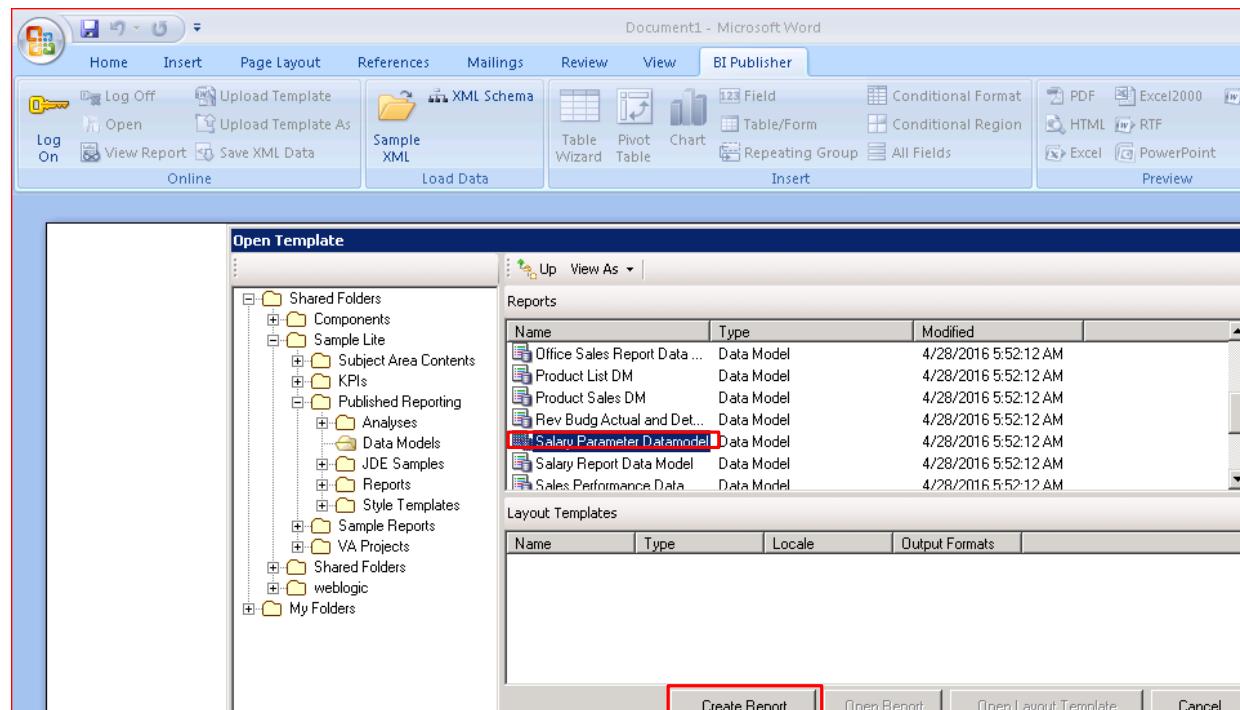
In this practice, you create a simple report by using an existing data model

Assumptions

You are logged in to BI Publisher Enterprise Edition through MS Word and you have a blank document open.

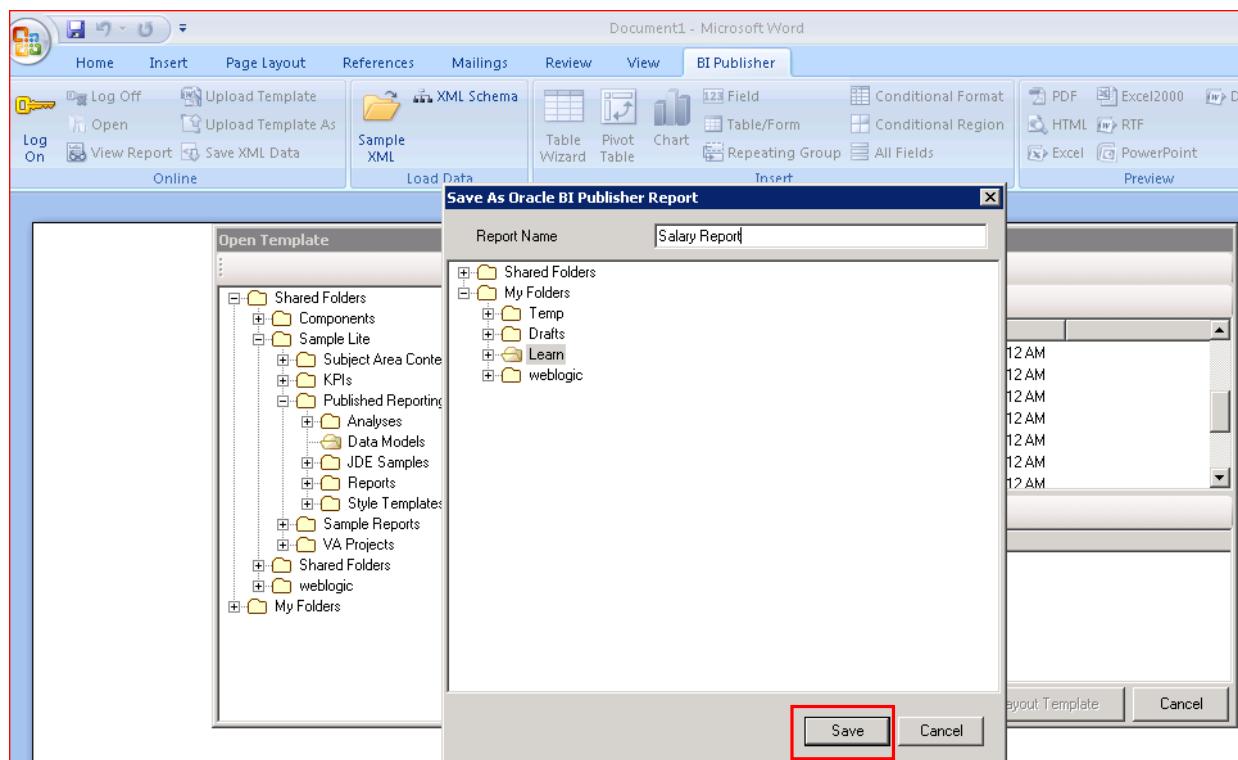
Tasks

1. Open MS Word: In the Online grouping, click **Open**.
2. In the Open Template dialog box, navigate to \Shared Folders\Sample Lite\Published Reporting\Data Models\ and select **Salary Parameter Datamodel**. Click Create Report



Save the New Report Definition within the BI Catalog. Name the Report **Salary Report**.

Click Save



The Data Model loads into MS Word.



3. In the Insert grouping, click **Table Wizard**.
4. Select the **Table** option on the "Please select your report format" page and click **Next**.
5. Accept the defaults and click the Next button.

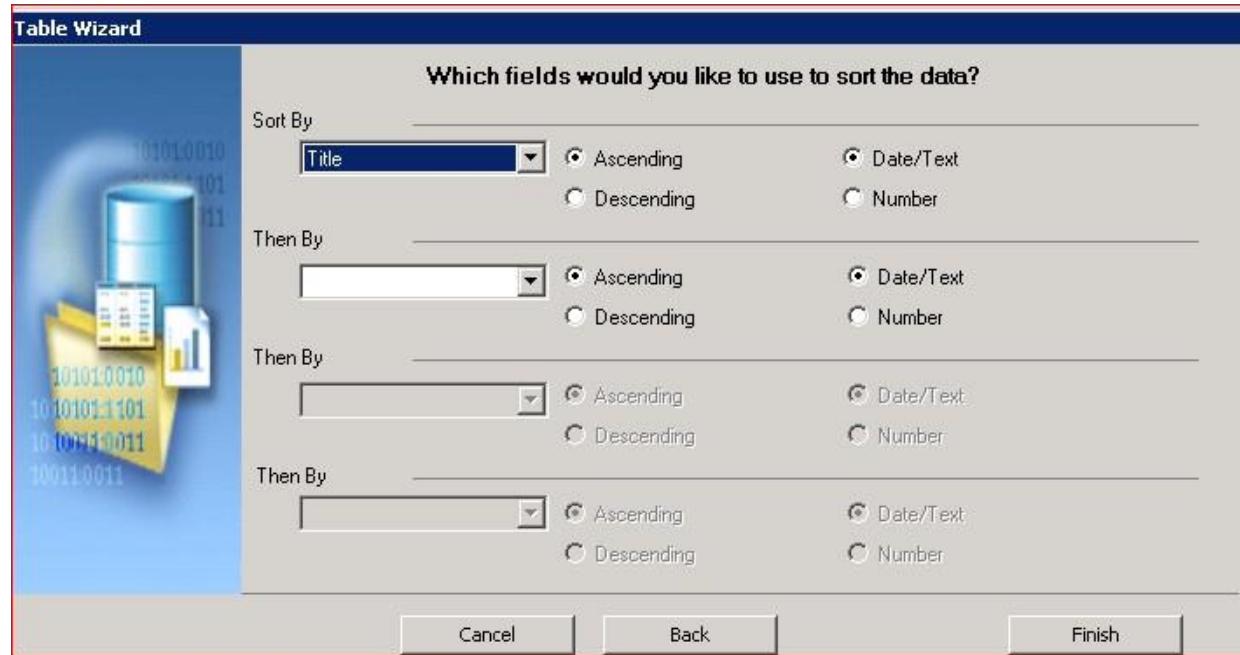
6. Select the following fields and click **Next**.



7. Group Above by Department and Break via the Section.



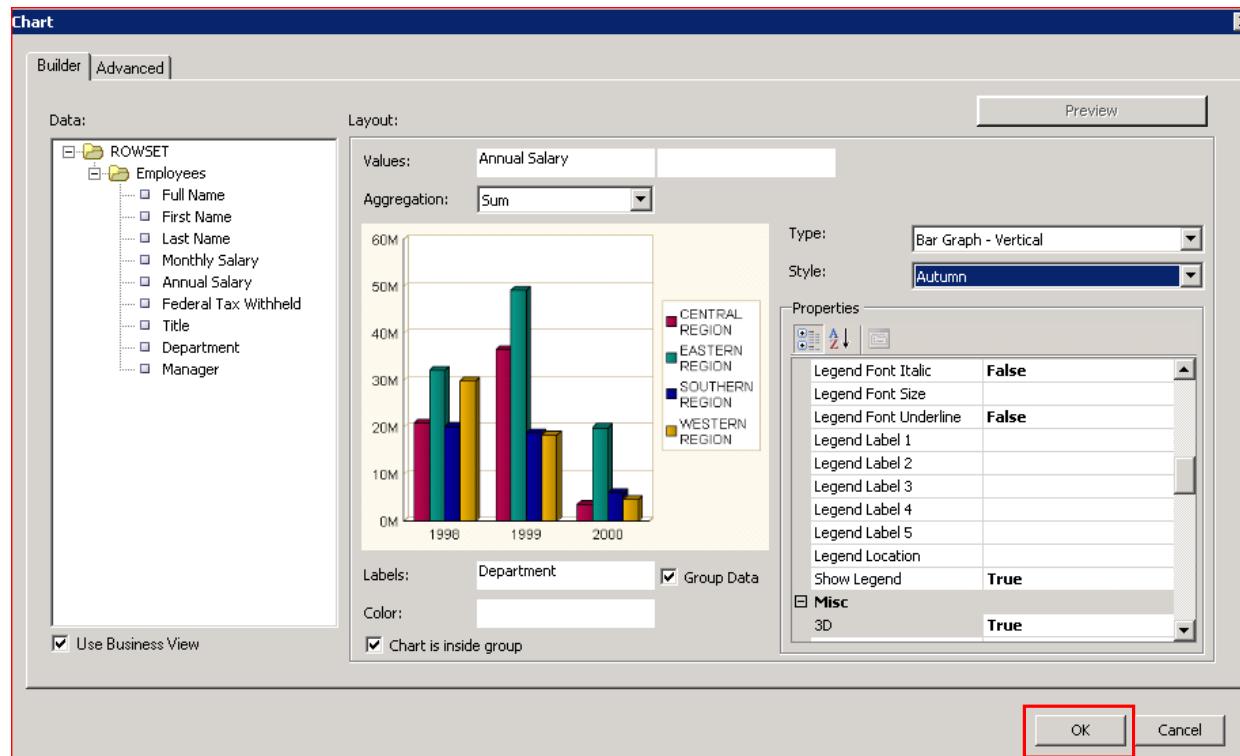
8. Sort Title in Ascending. Click Finish.



9. Create a Chart.

10. In the Layout Pane, enter the following columns:

Values	Annual Salary
Labels	Departments
Chart is Inside Group	Checked
Style	Autumn

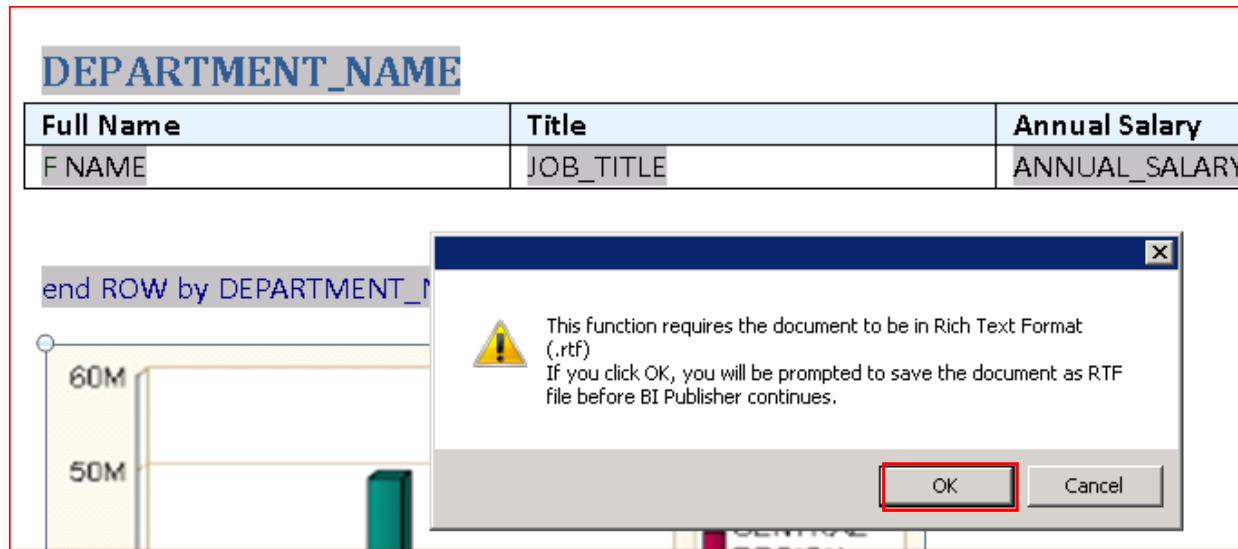


11. Click **OK**.

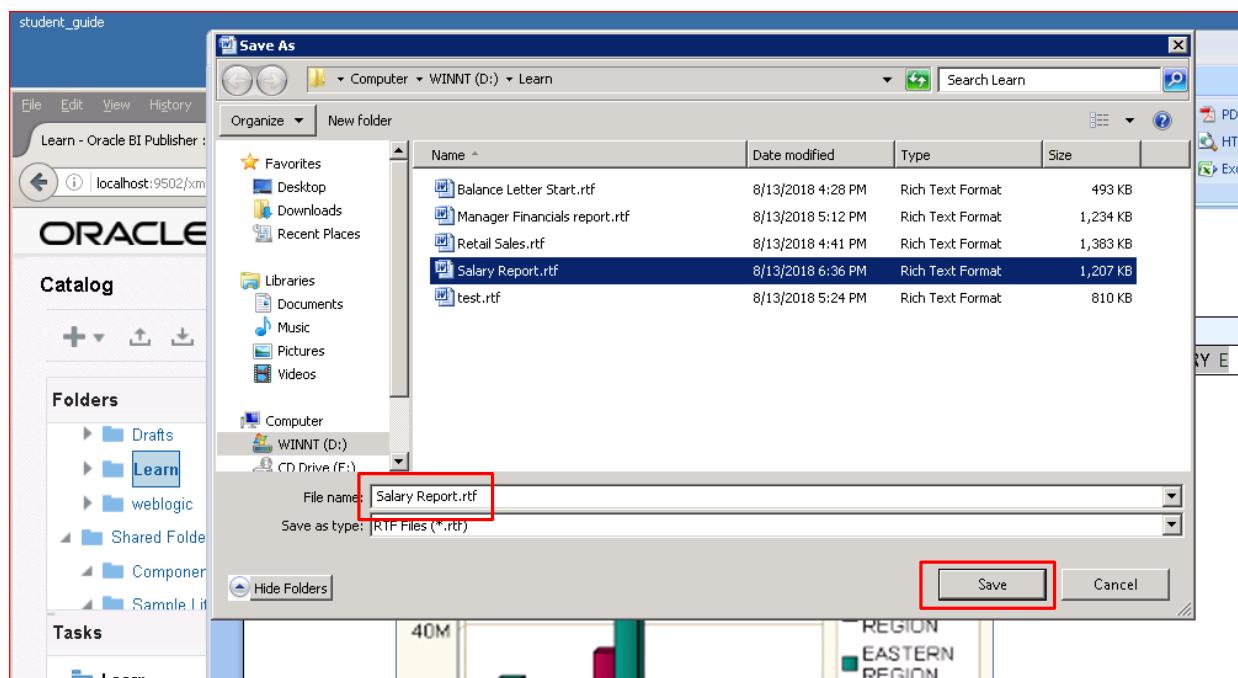
12. The report will look like this.

Full Name	Title	Annual Salary
F NAME	JOB_TITLE	ANNUAL_SALARY

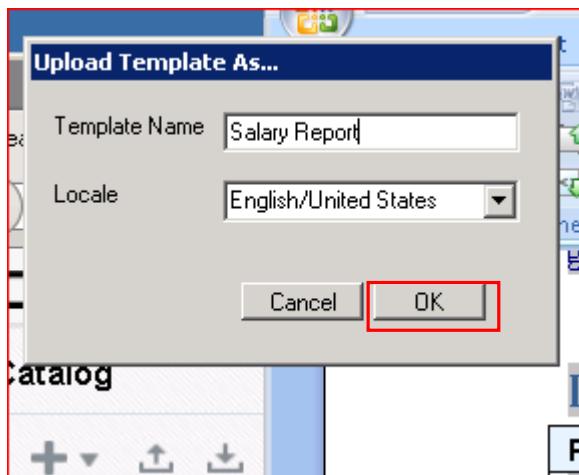
13. Click Upload Template As in the Online section. Because the RTF has not been saved, the following message will appear.



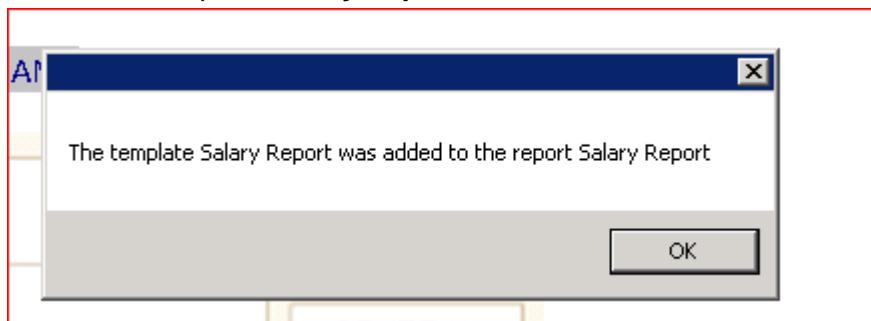
14. Click the **OK** button.
15. Save the RTF in **D:\Learn** with the file name of **Salary Report.rtf**. Click the **Save** button.



16. A screen will display asking for the name of the Report Layout Template within BI Publisher.



Name the Template **Salary Report** and click the **OK** button.



17. View the Report Template within BI Publisher. Navigate to BI Publisher > Catalog > My Folders > Learn. Click the Open option for **Salary Report**.

The screenshot shows the BI Publisher Catalog interface. The left sidebar has 'Folders' expanded, showing 'Drafts', 'Learn' (which is selected and highlighted in blue), and 'weblogic'. Under 'Tasks', there are 'Learn', 'Expand', 'Delete', 'Copy', 'Paste', 'Upload', 'Download', 'Cut', and 'Rename' options. The main area lists report templates with their details and actions. The 'Salary Report' entry is highlighted with a red box around its 'Open' button. Other entries include 'My Airlines Report', 'My Revenue Report', 'My Salary Report - Boiler Plate', 'My Salary Report - Simple Layout', 'My Salary Report', and 'My Airlines Report'.

Report Name	Last Modified	Created By	Action Buttons
My Airlines Report	8/6/18 10:38 PM	Created By weblogic	Open Schedule Jobs Job History Edit More
My Revenue Report	8/6/18 10:57 PM	Created By weblogic	Open Schedule Jobs Job History Edit More
My Salary Report - Boiler Plate	8/9/18 9:55 PM	Created By weblogic	Open Schedule Jobs Job History Edit More
My Salary Report - Simple Layout	8/9/18 9:04 PM	Created By weblogic	Open Schedule Jobs Job History Edit More
My Salary Report	8/6/18 10:21 PM	Created By weblogic	Open Schedule Jobs Job History Edit More
Salary Report	8/13/18 7:49 PM	Created By weblogic	Open Schedule Jobs Job History Edit More
My Airlines Report	8/6/18 10:38 PM	Created By weblogic	Edit More

The report template will be displayed.

Salary Report

Home Catalog New Open Signed In As weblogic

Department All Employee All Apply

Salary Report

Accounting

Full Name	Title	Annual Salary
Shelley Higgins	Accounting Manager	144096
William Gietz	Public Accountant	99600

ANNUAL SALARY

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

ANNUAL SALARY

Practice 7-5: Reviewing a Report with Page-Level Calculations

Overview

In this practice, you open a report locally that contains page totals and brought- and carry-forward totals, load the XML data, and preview the report.

Tasks

1. Navigate to MyFiles folder and open Advanced Page Totals.rtf.
2. In the Load Data grouping, click **Sample XML**.



3. The sample XML data is located in the same folder (“MyFiles”) as the RTF file. Select **Advanced Page Totals.xml**.
4. Click **Open** and then click **OK** when the message dialog box appears.
5. The RTF template contains a page total indicated by the code variable **PT;** (highlighted in the following screenshot).

The template also contains Carry Forward and Brought Forward totals.

6. In the Preview grouping, click **PDF** to view the report. Scroll down to view the Brought Forward and Carry Forward totals.

Employee Salary Report				
Name	Job Title	Manager	Department Name	Salary
Neena Kochhar	Administration Vice President	Steven King	Executive	17,000.00
Luis De Haan	Administration Vice President	Steven King	Executive	17,000.00
Alexander Hunold	Programmer	Luis De Haan	IT	9,000.00
Eduardo Fatih	Programmer	Alexander Hunold	IT	5,000.00
Gerd Austin	Programmer	Alexander Hunold	IT	4,800.00
John Petrovitch	Programmer	Alexander Hunold	IT	4,800.00
Olivia Lerebeltz	Programmer	Alexander Hunold	IT	4,200.00
Nancy Greenberg	Finance Manager	Neena Kochhar	Finance	13,000.00
Donna Favel	Accountant	Nancy Greenberg	Finance	9,000.00
John Chen	Accountant	Nancy Greenberg	Finance	8,200.00
Tamara Sotera	Accountant	Nancy Greenberg	Finance	7,700.00
Jose Manuel Urtman	Accountant	Nancy Greenberg	Finance	7,800.00
Lisa Popp	Accountant	Nancy Greenberg	Finance	5,900.00
Den Raphaely	Purchasing Manager	Steven King	Purchasing	11,000.00
Alexander Hunold	Purchasing Manager	Den Raphaely	Purchasing	3,100.00
Mark Lisi	Purchasing Clerk	Den Raphaely	Purchasing	2,000.00
Erica Tobiols	Purchasing Clerk	Den Raphaely	Purchasing	2,000.00
Louie Wilms	Purchasing Clerk	Den Raphaely	Purchasing	2,000.00
Karen Commerford	Purchasing Clerk	Den Raphaely	Purchasing	2,000.00
Matthew Weiss	Stock Manager	Steven King	Shipping	8,000.00
Adam Fipp	Stock Manager	Steven King	Shipping	8,200.00
Levahn Kuching	Stock Manager	Steven King	Shipping	7,000.00
Shanta Volman	Stock Manager	Steven King	Shipping	6,800.00
Kevin Muncy	Stock Manager	Steven King	Shipping	5,800.00
Jill Nayar	Stock Clerk	Matthew Weiss	Shipping	3,200.00
Irene Mikkilinen	Stock Clerk	Matthew Weiss	Shipping	2,700.00
James Landry	Stock Clerk	Matthew Weiss	Shipping	2,400.00
Cleveon Manke	Stock Clerk	Matthew Weiss	Shipping	2,200.00
Laura Bassi	Stock Clerk	Adam Fipp	Shipping	3,300.00
Miche Allison	Stock Clerk	Adam Fipp	Shipping	2,800.00

Employee Salary Report				
Name	Job Title	Manager	Department Name	Salary
James Marais	Stock Clerk	Adam Fipp	Shipping	2,000.00
Julia Olson	Stock Clerk	Adam Fipp	Shipping	3,000.00
Jason Mallin	Stock Clerk	Piyam Kauffing	Shipping	3,300.00
Michael Rogers	Stock Clerk	Piyam Kauffing	Shipping	2,900.00
Hi Gee	Stock Clerk	Piyam Kauffing	Shipping	2,400.00
Hazel Phantaser	Stock Clerk	Piyam Kauffing	Shipping	2,300.00
Renata J. Adijo	Stock Clerk	Shanta Volman	Shipping	3,600.00
Zachariah Stiles	Stock Clerk	Shanta Volman	Shipping	3,200.00
John Leo	Stock Clerk	Shanta Volman	Shipping	2,700.00
Justina Patel	Stock Clerk	Shanta Volman	Shipping	2,500.00
Henna Raks	Stock Clerk	Kevin Muncy	Shipping	3,500.00
Corma Davies	Stock Clerk	Kevin Muncy	Shipping	3,700.00
Ronald Matis	Stock Clerk	Kevin Muncy	Shipping	2,400.00
Beller Rappaport	Stock Clerk	Kevin Muncy	Shipping	2,100.00
John Poppo	Sales Manager	Steven King	Sales	14,000.00
Karen Pöhlmann	Sales Manager	Steven King	Sales	13,000.00
Alberto Ernanzuz	Sales Manager	Steven King	Sales	12,000.00
Geirard Cambraufl	Sales Manager	Steven King	Sales	11,000.00
Terri Kotick	Sales Manager	Steven King	Sales	9,500.00
Peter Tucker	Sales Representative	John Russell	Sales	9,000.00
David Bernstein	Sales Representative	John Russell	Sales	9,200.00
Peter Hall	Sales Representative	John Russell	Sales	9,000.00
Christopher Olsen	Sales Representative	John Russell	Sales	8,800.00
Nanette Cambrault	Sales Representative	John Russell	Sales	7,900.00
Oliver Towall	Sales Representative	John Russell	Sales	7,000.00
Jeanette King	Sales Representative	Karen Pöhlmann	Sales	6,500.00
Patricia Dilly	Sales Representative	Karen Pöhlmann	Sales	9,500.00
Allan McEwen	Sales Representative	Karen Pöhlmann	Sales	9,000.00
Lindsey Smith	Sales Representative	Karen Pöhlmann	Sales	8,000.00
Louise Doran	Sales Representative	Karen Pöhlmann	Sales	7,800.00
Lydia Cieval	Sales Representative	Karen Pöhlmann	Sales	7,000.00
Dana Vellary	Sales Representative	Alberto Ernanzuz	Sales	6,500.00
Corinne Greene	Sales Representative	Alberto Ernanzuz	Sales	8,500.00
Marta Marquis	Sales Representative	Alberto Ernanzuz	Sales	7,200.00

7. Close the PDF.

**Practices for Lesson 8: BI
Publisher Server:
Administration and Security**

Practices for Lesson 8: Overview

Goal

To explore Administration within BI Publisher and perform administrative tasks, such as reviewing roles and permissions and configuring the email server

Practices Overview

You will perform administrative tasks that include:

- Configuring data sources
- Reviewing user roles and permissions
- Configuring the email server (the Oracle classroom environment uses hMailServer)
- Configuring delivery options

Time

15 minutes

Practice 8-1: Defining a File Data Source

Overview

In this practice, you define a file as the data source for BI Publisher. You may define an existing XML or MS Excel file that is stored in a directory to which BI Publisher can connect. Other data sources accessible to BI Publisher include JDBC, JNDI, OLAP, and LDAP. Note that you have already defined one data source (JDBC) in the “Using Data Model Editor” practice.

Assumptions

You have defined the JDBC connection.

Tasks

1. Log in to BI Publisher. Click **Administration**.
2. Click **File** in the Data Sources section.

The screenshot shows the Oracle BI Publisher Enterprise Administration interface. The top navigation bar includes links for Home, Catalog, New, Open, Signed In As (set to weblogic), and Sign Out. The main content area is titled "Administration". On the left, there's a sidebar with sections for 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), and System Maintenance (Server Configuration, Scheduler Configuration, Scheduler Diagnostics, Report Viewer Configuration, Manage Cache). The right side contains sections for Runtime Configuration (Properties, Font Mappings, Currency Formats) and Integration (Oracle BI Presentation Services). A vertical scroll bar is visible on the right side of the main content area.

The Data Sources page appears. The File tab lists the existing file sources, if any.

The screenshot shows the "Data Sources" page within the Administration interface. The top navigation bar has links for Home and Catalog. Below it, a breadcrumb trail shows "Administration > File". The main content area is titled "Data Sources" and features a tab bar with JDBC, JNDI, File, LDAP, OLAP, Web Services, and HTTP. The "File" tab is currently selected. A button labeled "Add Data Source" is at the top left. Below it is a table with two rows:

Data Source Name	Directory	Delete
demo_files	\$(xdo.server.config.dir)/repository/DemoFiles	
Samples Data Files	\$(xdo.server.config.dir)/repository/DemoFiles	

3. Click **Add Data Source**. The Add Data Source page appears.

The screenshot shows the 'Add Data Source' page with the 'General' tab selected. It has fields for 'Data Source Name' and 'Full Path of Top-level Directory'. A note below the path field states: 'Users can access files in this directory and any subdirectories.' There are 'Apply' and 'Cancel' buttons at the bottom.

4. Provide the display name and path for the data source file. The display name appears in the Data Source selection list within the Data Model Editor. The path is generally the full path to the top-level directory on your server. This enables users to access files in this directory and any subdirectories.

Enter the following:

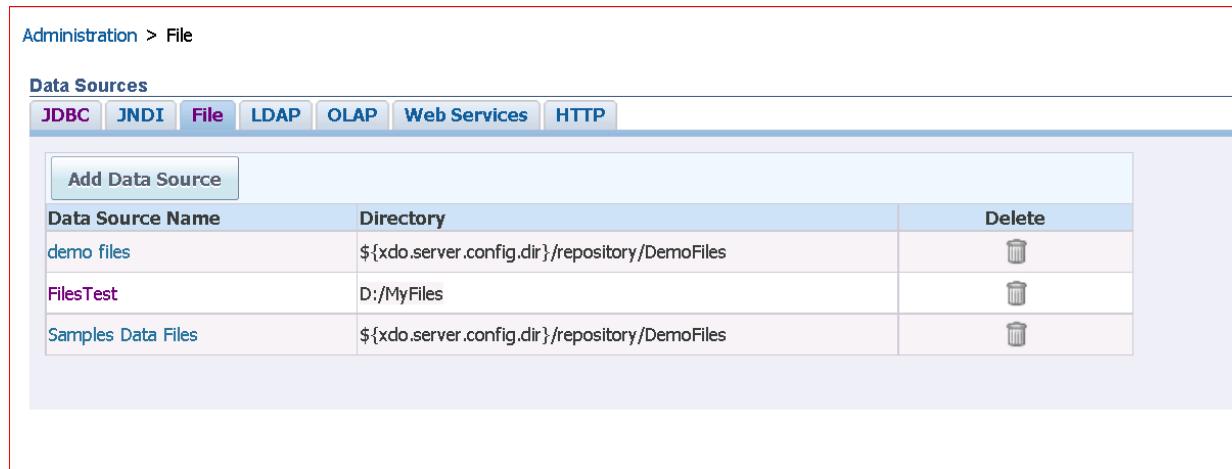
The screenshot shows the 'Add Data Source' page with the 'General' tab selected. The 'Data Source Name' is set to 'FileTest' and the 'Full Path of Top-level Directory' is set to 'D:\MyFiles'. A note below the path field states: 'Users can access files in this directory and any subdirectories.' There are 'Apply' and 'Cancel' buttons at the bottom.

In general, you can also define the file data source to any directory on your system that has your XML and other template files.

5. You can define security for this data source. You use the shuttle buttons () to move roles from the Available Roles pane to the Allowed Roles pane. Only users assigned to the roles on the Allowed Roles pane are able to create or view reports from this data source. Select **BI Service Administrator Role** and **BI Content Author Role** and click the shuttle button to move them to the Allowed Roles pane.

The screenshot shows the 'Security' page with the 'Available Roles' pane containing 'BI Consumer' and the 'Allowed Roles' pane containing 'BI Content Author' and 'BI Service Administrator'. Between the panes are shuttle buttons: 'Move', 'Move All', 'Remove', and 'Remove All'. At the top left is a checkbox for 'Allow Guest Access'. At the bottom right are 'Apply' and 'Cancel' buttons.

6. Click **Apply** to save your changes. The data source appears in the list of available data sources.



The screenshot shows the 'Administration > File' section of the Oracle BI Publisher interface. Under the 'Data Sources' tab, there is a table listing three data sources:

Data Source Name	Directory	Delete
demo files	\${xdo.server.config.dir}/repository/DemoFiles	
FilesTest	D:/MyFiles	
Samples Data Files	\${xdo.server.config.dir}/repository/DemoFiles	

An 'Add Data Source' button is visible at the top left of the table area.

Practice 8-2: Reviewing Permissions Assigned to Default BI Publisher Users

Overview

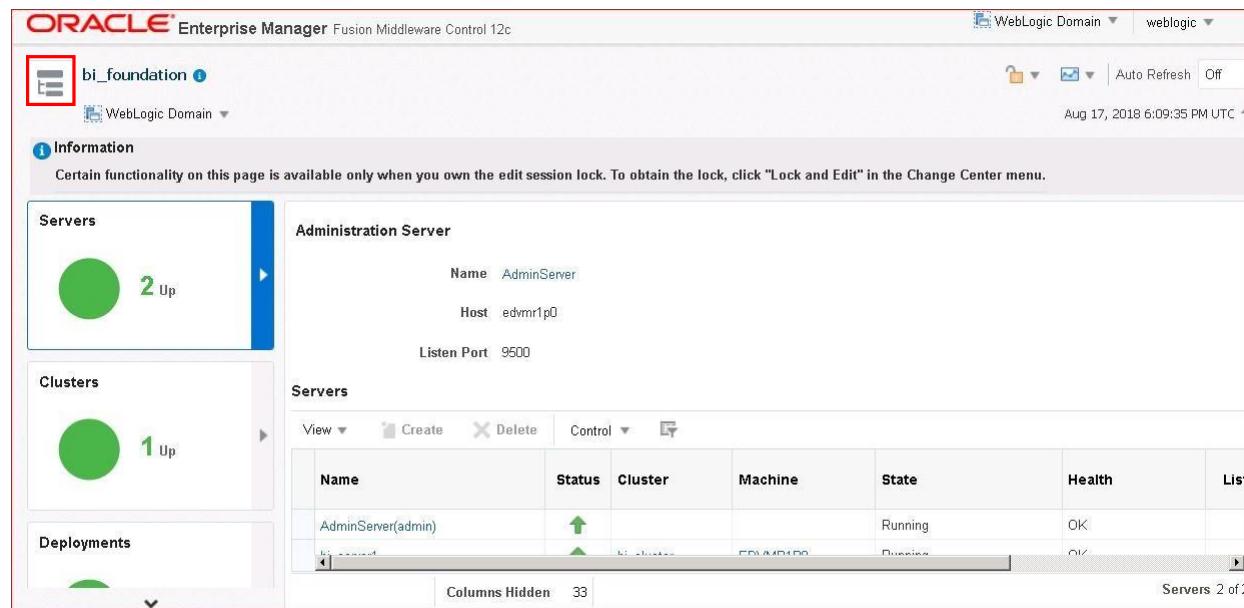
In this practice, you review the permissions allocated to BI Publisher users. BI Publisher users are created in WebLogic; therefore, you can only review the assigned permissions. This practice is designed to emphasize the differences between earlier version of BI Publisher and the current version, BI Publisher 12c.

Assumptions

The default users were created during installation.

Tasks

1. Log in to <http://localhost:9500/em> as an administrative user. In this case, log in as User: weblogic Password: weblogic1. Click Target Navigator and expand Business Intelligence, and click biinstance.



ORACLE® Enterprise Manager Fusion Middleware Control 12c

Target Navigation

View ▾

- ▶ Application Deployments
- ◀ WebLogic Domain
 - ▶ bi_foundation
 - AdminServer
 - ▶ bi_cluster
 - ▶ Business Intelligence
 - biinstance
 - ▶ Coherence Clusters
 - ▶ Metadata Repositories

You own the edit session lock. To obtain the lock, click "Lock and Edit".

server

Name AdminServer

Host edvmr1p0

Listen Port 9500

Create Delete Control

Status Cluster Machine

This screenshot shows the Oracle Enterprise Manager interface. On the left, the 'Target Navigation' pane is open, displaying a hierarchical tree of targets. A red box highlights the 'biinstance' node under the 'Business Intelligence' section. The main content area shows a summary for the 'AdminServer' instance, including its name, host, listen port, and creation/deletion controls. A note at the top indicates that the user owns the edit session lock.

2. Your screen will look like the following:

ORACLE® Enterprise Manager Fusion Middleware Control 12c

biinstance ⓘ

Business Intelligence Instance ▾

Overview Availability Configuration Diagnostics Security

System Shutdown & Startup

100% Up (5)

System Components

System Status

All components are available

Diagnostics

Most Recent Errors

Severity Message

No recent errors to report

Capacity Manager

Responsiveness

Request Processing Time

Average Query Time

This screenshot shows the Oracle Enterprise Manager BI instance dashboard for 'biinstance'. It includes sections for system shutdown/startup status, system status (all components available), diagnostics (no recent errors), and capacity management metrics (request processing time and average query time). The 'Overview' tab is selected.

3. Expand Business Intelligence Instance and select Security > Application Roles.

The screenshot shows the Oracle Enterprise Manager interface for Fusion Middleware Control 12c. The top navigation bar has 'biinstance' selected. Below it, under 'Business Intelligence Instance', the 'Security' link is highlighted with a red box. A dropdown menu from 'Security' shows 'Application Policies' and 'Application Roles', both of which are also highlighted with red boxes. The main content area displays a green circular progress bar with '100%' and 'Up (5)' text, and a section titled 'System Components'.

Notice the Default BI Application Roles.

The screenshot shows the 'Application Roles' page in Oracle Enterprise Manager. The top navigation bar includes 'WebLogic Domain' and 'weblogic'. The main content area shows a search interface with 'Application Stripe' set to 'obi'. Below it is a table listing 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.

You can also select Application Policies to view the Default BI Policies.

4. On the BI Publisher Administration page, click **Roles and Permissions** in the Security Center section.



5. The preconfigured roles and permissions for the authenticated user `weblogic` appear. Observe that the roles for BI Service Administrator, BI Content Author, and BI Consumer are preconfigured. These are called “seeded” application roles in Oracle Fusion Middleware.

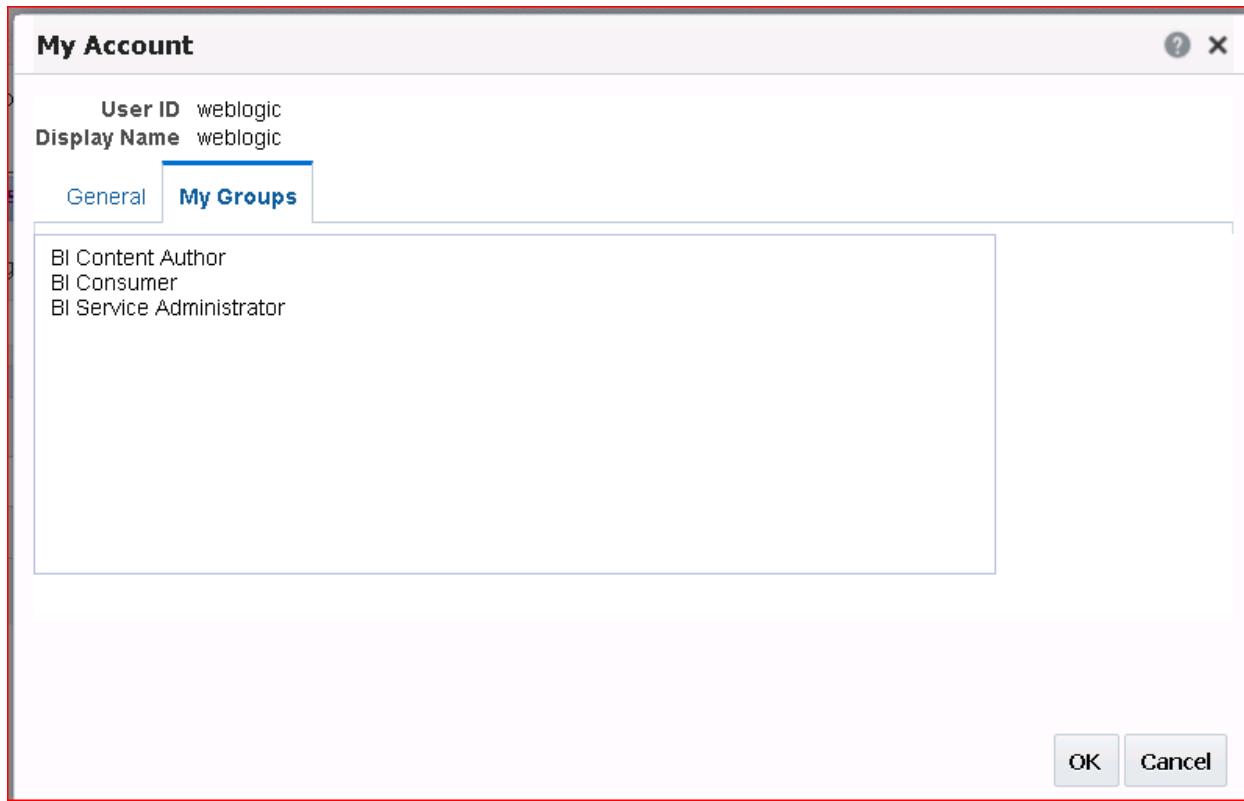
A screenshot of the 'Roles and Permissions' page under the 'Administration' section. The page title is 'Administration > Roles and Permissions'. At the top, there is a 'Security Center' tab with three sub-links: 'Security Configuration', 'Roles and Permissions' (which is selected and highlighted in blue), and 'Digital Signature'. Below this, there is a search bar with a dropdown for 'Number of rows displayed per page' set to 10, and a 'Role Name' input field with a 'Search' button. A table lists three preconfigured roles:

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.	

6. You can also check the account privileges for your user ID. Click the **Signed in as <user>** link, and select **My Account**.



The My Account dialog box appears. Click the My Groups tab. Note that the weblogic user is assigned to three roles: BI Service Administrator, BI Content Author, and BI Consumer.



7. Click **Cancel**.

Practice 8-3: Configuring the Email Server as a Delivery Option

Overview

In this practice, you set up hMailServer as a delivery option for BI Publisher, so that you can send reports as email attachments.

Assumptions

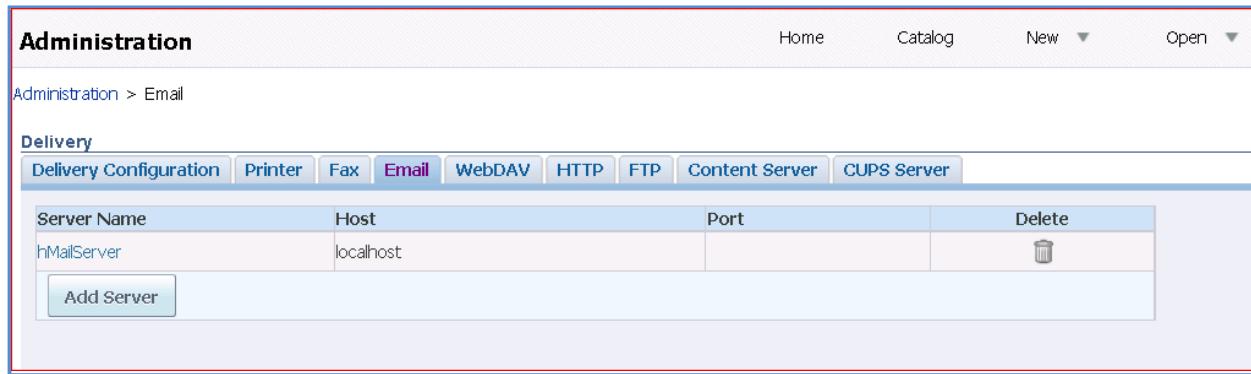
You are still logged in to BI Publisher.

Tasks

1. To begin this practice, the services for hMailServer must be running. Start hMailServer.
Click Start > Programs > hMailServer > Service > Start Service.
2. Click the Administration link.
3. Click **Email** in the Delivery section.



4. The Email tab of the Delivery page appears. Click **Add Server**.



5. On the Add Server page, enter the following details:

Step	Field	Value
a.	Name	hMailServer
b.	Host	localhost
c.	Username	user@localhost
d.	Password	Leave this field empty.

The Add Server page should look like this:

The screenshot shows the 'Add Server' dialog box. At the top right are buttons for 'Test Connection', 'Apply', and 'Cancel'. Below is the 'General' tab, which contains fields for 'Server Name' (set to 'hmailServer'), 'Host' (set to 'localhost'), 'Port' (empty), and 'Secure Connection' (set to 'None'). Below the general tab is the 'Security' tab, which contains fields for 'Username' (set to 'user@localhost') and 'Password' (empty).

6. Click **Apply**.

7. Your server appears in the table. To edit the settings, click the desired server name link.

The screenshot shows the 'Delivery Configuration' page with the 'Email' tab selected. At the top right are buttons for 'New', 'Open', and 'Signed In As'. Below is a table with one row, showing a server named 'hmailServer' with host 'localhost' and an empty port. There is a 'Delete' button next to the row. At the bottom left is a 'Add Server' button.

In the practices for Lesson 9, “Scheduling and Bursting Reports,” you will review the Scheduler configuration and diagnostics.

Practices for Lesson 9:
Scheduling and Bursting
Reports

Practices for Lesson 9: Overview

Goal

To explore the scheduling and bursting capabilities of BI Publisher

Practices Overview

You examine the BI Publisher Scheduler, schedule a report, and review the report job. You also add a scheduling trigger and review the report. You add a bursting definition for a sample report.

In this practice, you do the following:

- Review the Scheduler configuration.
- Schedule a report.
- Edit the report.
- Schedule the report with a trigger.
- Review the report job history.
- Review the data model for the report containing bursting definition.
- Add bursting definition to a sample report and review the bursting results.

Assumptions

- Oracle BI Publisher is up and running.
- “My Files” is downloaded and unzipped.
- You are familiar with the Data model Editor and Create Report Wizard.
- You logged in with the BI Administrator role.

Time:

35–45 minutes

Practice 9-1: Examining BI Publisher Scheduler and Scheduling a Report

Overview

In this practice, you explore BI Publisher Scheduler and schedule a BI Publisher report.

Assumptions

To perform the tasks in this practice, you should have administrative privileges.

Tasks

1. Navigate to the Administration page.
2. On the Administration page in the System Maintenance section, click **Scheduler Configuration** to examine the JNDI connection.

The screenshot shows the Oracle BI Administration interface. At the top, there's a navigation bar with tabs: Home, Catalog, New ▾, and Open ▾. Below the navigation bar, there are several sections: Data Sources (JDBC Connection, JNDI Connection, File, LDAP Connection, OLAP Connection, Web Service Connection, HTTP Connection), System Maintenance (Server Configuration, Scheduler Configuration, Scheduler Diagnostics, Report Viewer Configuration, Manage Cache), Security Center (Security Configuration, Roles and Permissions, Digital Signature), Runtime Configuration (Properties, Font Mappings, Currency Formats), Delivery (Delivery Configuration, Printer, Fax, Email, WebDAV, HTTP, FTP, Content Server, CUPS Server), and Integration (Oracle BI Presentation Services). The 'Scheduler Configuration' link under the System Maintenance section is highlighted with a red box.

3. The Schedule Configuration page appears. Examine the Database Connection area.

Administration > Scheduler Configuration

System Maintenance

Scheduler Configuration Scheduler Configuration Scheduler Diagnostics Report Viewer Configuration Manage Cache

Apply Cancel

Scheduler Selection

Scheduler: Quartz

Enable Public Output Option

Quartz Clustering

Database Connection

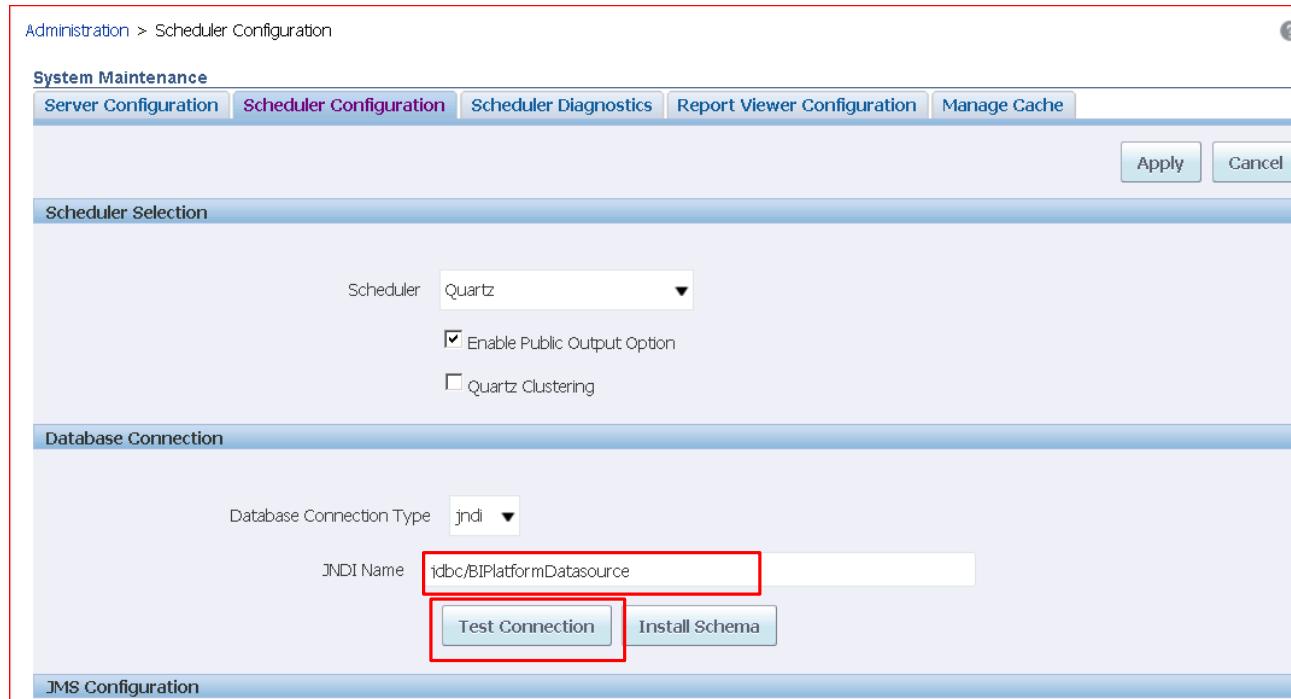
Database Connection Type: jndi

JNDI Name: **1dbc/BIPPlatformDatasource**

Test Connection (button highlighted with red box)

Install Schema

JMS Configuration



4. Click **Test Connection**. A confirmation message appears if the database connection is successfully established. Click **Cancel**.

Administration > Scheduler Configuration

Confirmation

Connection established successfully.

System Maintenance

Server Configuration Scheduler Configuration Scheduler Diagnostics Report Viewer Configuration Manage Cache

Apply Cancel

Scheduler Selection

Scheduler: Quartz

Enable Public Output Option

Quartz Clustering



5. Click the **Scheduler Diagnostics** tab. Review the results. The **Result** area must show "passed" as indicated in the following screenshot.

The screenshot shows the 'Scheduler Configuration' tab selected in the navigation bar. The 'Scheduler Diagnostics' tab is highlighted with a red border. The 'Result' field displays 'Passed'. Below it, a table lists various diagnostic items with their values, status, and details. Most entries show 'Passed' or 'Info' status. One entry for 'BIP_CONNECTION_FACTORY_NAME' shows 'Info' status with the note 'weblogic'.

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_MO DE	Oracle BI	Info	weblogic
-----BIP_CONNECTION_FACTORY_NA ME	BIP.JMS.CF	Info	

6. Select the report Salary Report from the Catalog.
(File path: Shared Folders > SampleLite > Published Reporting > Reports > Salary Report)

The screenshot shows the 'Catalog' interface with the 'Reports' section selected in the left sidebar. A report titled 'Salary Report' is highlighted with a red border. The report details are visible, including its last modified date (8/3/18 11:35 PM), creator (weblogic), and features (Multiple layout types; Cascading parameters displayed as menu with search). The 'Schedule' button for this report is also highlighted with a red border.

Click **Schedule**.

7. The Schedule Report Job page appears with the report name displayed.

Observe that the overview displays the parameters with "All" for Department and Employee.

8. On the **Output** tab, select both the check boxes for "Make Output Public" and "Save Data for Republishing." Make sure that the **Use Bursting Definition to Determine Output & Delivery Destination** option is deselected.

Name	Layout	Format	Locale
Output1	Simple	PDF	English (United States)

9. On the **Schedule** tab, select **Daily** from the Frequency drop-down list and then enter 1 for Every day(s). Check the Start and the End date and time. Make sure that the report does not run immediately.

Schedule Report Job

Overview

General Created by weblogic
Report Name /Sample Lite/Published Reporting/Reports/Salary Report.xdo
Schedule Start on Sep 5, 2018 4:46:34 PM Recur Daily

Outputs Output1
Destination
Notification

General Output **Schedule** Notification Diagnostic

Define Schedule Time

Frequency Daily

Every 1 day(s)

Start Sep 5, 2018 4:46:34 PM [GMT+00:00] Casablanca

End Sep 10, 2018 3:46:34 PM [GMT+00:00] Casablanca

Define Schedule Trigger

Use Trigger

10. On the **Notification** tab, select the Notify By Email check box and enter `user@localhost.com` as the email address. This is the same email address that you created in the “Administration and Security” practice.

Schedule Report Job

Overview

General Created by weblogic
Report Name /Sample Lite/Published Reporting/Reports/Salary Report.xdo
Schedule Start on Sep 5, 2018 4:46:34 PM Recur Daily

Outputs Output1
Destination
Notification Email

Return **Submit**

General Output Schedule **Notification** Diagnostic

Notify By Email **Email Address** user@localhost.com

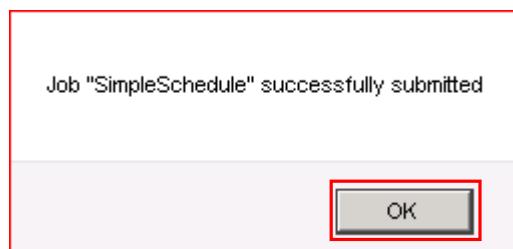
When Report completed
 Report completed with warnings
 Report failed
 Report skipped

11. Click **Submit**.

12. Enter SimpleSchedule in the Report Job Name text box. Notice the schedule details in the dialog box. Click **OK**.



13. An alert message window appears, indicating that your job has been successfully submitted. Click **OK**.



Practice 9-2: Reviewing and Editing a Scheduled Job

Overview

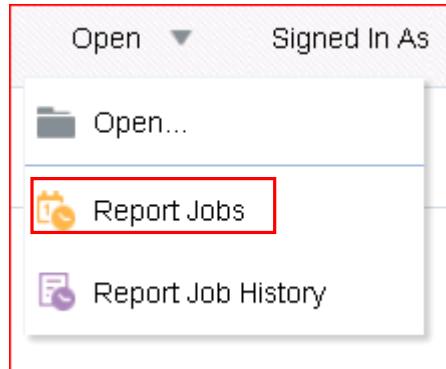
In this practice, you edit the previously scheduled report, add a schedule trigger to the report job, and view the job details.

Assumptions

To perform the tasks in this practice, you should have scheduled the Salary Report – Search report in the previous practice.

Tasks

1. Click Open > Report Jobs on the global header.



2. The Manage Report Jobs page appears. Your scheduled job, SimpleSchedule, appears in the Report Jobs table with Active status. Click **SimpleSchedule**.

A screenshot of the 'Manage Report Jobs' page. The page has a header with links for Home, Catalog, New, Open, and Signed In As (set to 'weblogic'). Below the header is a search bar with a dropdown for 'Select time zone to view jobs' set to 'Casablanca'. There are sections for 'Filters' and 'Report Jobs'. The 'Report Jobs' section contains a table with the following data:

Report Job Name	Report Name	Status	Start Time	End Time	Frequency	Owner	Scope	Edit	History
SimpleSchedule	/Sample Lite/Published Reporting/Reports/Sala...	Active	Sep 05, 2018 04:46:34 PM	Sep 10, 2018 03:46:34 PM	Repeats Daily	weblogic	Public		

3. Note that the parameters for **department** and **employee** are set to *. You can also see Active Start Date, Report Job Schedule, and so on.

SimpleSchedule

- Report Job ID: 1013
- 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: Run every day(s)
- Report Scope: Public
- Active Start Date: Sep 5, 2018 4:46:34 PM [GMT+00:00] Casablanca
- Active End Date: Sep 10, 2018 3:46:34 PM [GMT+00:00] Casablanca
- Trigger Data Model
- Trigger Name
- Trigger Retry Limit
- Trigger Pause Time
- Trigger Parameters

Report Parameters

- Employee: All
- Department: All

Click the **Edit** icon () next to Report Job ID.

4. The Schedule Report Job page appears. On the **General** tab, change the parameters for Department to **Marketing, Purchasing, and Shipping**.

Schedule Report Job

Overview

- General: Created by weblogic
- Report Name: /Sample Lite/Published Reporting/Reports/Salary Report.xdo
- Schedule: Start on Sep 5, 2018 4:46:34 PM Recur Daily
- Outputs: Output1
- Destination:
- Notification: Email

General **Output** **Schedule** **Notification** **Diagnostic**

Report: /Sample Lite/Published Reporting/Rep

Parameters

Department	Marketing;Purchasing;Shipping	Employee	All
<input type="checkbox"/> All			
<input type="checkbox"/> Administration			
<input checked="" type="checkbox"/> Marketing			
<input checked="" type="checkbox"/> Purchasing			
<input type="checkbox"/> Human Resources			
<input checked="" type="checkbox"/> Shipping			

5. Click the **Schedule** tab, and change Frequency to Once.

6. Select the **Run Now** option.

The screenshot shows the 'Schedule Report Job' page. At the top, there are navigation links: Home, Catalog, New ▾, Open ▾, Signed In As weblogic ▾. Below these are buttons: Return, Submit, and Submit As New (which is highlighted with a red box). The main area has tabs: General, Output, **Schedule** (highlighted with a red box), Notification, Diagnostic. Under the Schedule tab, there's a section titled 'Define Schedule Time'. It shows 'Frequency' set to 'Once' (highlighted with a red box) and 'Run Now' checked (highlighted with a red box). A 'Start' button is followed by a date and time field: Sep 5, 2018 4:46:34 PM [GMT+00:00] Casablanca.

7. Click **Submit As New**. (This option submits the job with all of the current options and parameters.)

8. Name the report **ScheduleNow** and click **OK**.

The screenshot shows the 'Submit As New' dialog box. It lists various configuration options: Report /Sample Lite/Published Reporting/Reports/Salary Report.xdo, Parameters Department:Marketing;Purchasing;Shipping, Employee:All, Schedule Start immediately, Output Output1, Notification Email, Trigger Data Model, Trigger Name, Trigger Retry Limit, Trigger Pause Time, Trigger Parameters. At the bottom, there is a 'Report Job Name' field containing 'ScheduleNow' (highlighted with a red box). Below the field are 'OK' and 'Cancel' buttons, with 'OK' highlighted with a red box.

9. Click **OK** again in the confirmation window.

10. Click Open > Report Jobs. Only one iteration of the scheduled job **SimpleSchedule** appears in the Report Jobs table.

The screenshot shows the 'Manage Report Jobs' interface. At the top, it says 'Last Refreshed Sep 05, 2018 04:14:07 PM Western European Summer Time'. Below that is a dropdown for 'Select time zone to view jobs' set to [GMT+00:00] Casablanca. There are 'Filters' and 'Report Jobs' sections. Under 'Report Jobs', there is a table with one row for 'SimpleSchedule'. The table columns are: Report Job Name, Report Name, Status, Start Time, End Time, Frequency, Owner, Scope, Edit, and History. The 'SimpleSchedule' row has values: /Sample Lite/Published Reporting/Reports/Sala..., Active, Sep 05, 2018 04:46:34 PM, Sep 10, 2018 03:46:34 PM, Repeats Daily, weblogic, Public, and a History link.

11. Click Open > Report Job History. **ScheduleNow** is listed because it is already executed.

The screenshot shows the 'Report Job History' interface. At the top, it says 'Last Refreshed Wed Sep 05, 2018 04:29:36 PM Western European Summer Time'. Below that is a dropdown for 'Time Zone used for filters and display' set to [GMT+00:00] Casablanca. There are 'Filters' and 'Report Job Histories' sections. Under 'Report Job Histories', there is a table with one row for 'ScheduleNow'. The table columns are: Report Job Name, Report Name, Status, Start Processing, End Processing, Owner, and Scope. The 'ScheduleNow' row has values: ScheduleNow, Salary Report.xdo, Success, Sep 05, 2018 04:27:56 PM, Sep 05, 2018 04:27:59 PM, weblogic, and Public. The 'Report Job Name' column for 'ScheduleNow' is highlighted with a red box.

12. Click **ScheduleNow**. Notice that only three departments have been selected. Observe the schedule details as well.

Report Job History

General Information		Report Job Execution Information	
Report Job ID	1015	Report Job Status	Success
Report Job Name	ScheduleNow	Start Processing Time	9/5/18 4:27:56 PM WEST
Owner	weblogic	End Processing Time	9/5/18 4:27:59 PM WEST
Report Name	Salary Report	Time Elapsed	3.391 seconds
Report Scope	Public		
Report Job Schedule	9/5/18 4:27:56 PM WEST		
Active Start Date			
Active End Date			
Trigger Data Model			
Trigger Name			
Trigger Retry Limit			
Trigger Pause Time			
Trigger Parameters			

Report Parameters

Employee	All
Department	Marketing;Purchasing;Shipping

Output & Delivery

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

Practice 9-3: Adding Schedule Triggers to a Report Job

Overview

In this practice, you edit the previously scheduled report to add a schedule trigger, and view the job details.

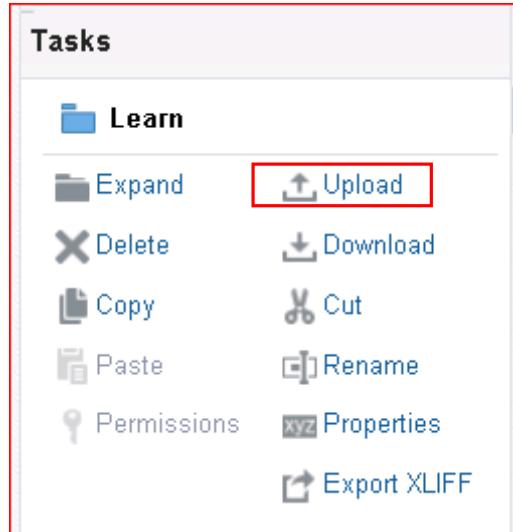
Assumptions

To perform the tasks in this practice, you should have scheduled the Salary Report – Search report in Practice 8-1.

Uploading a Data Model

Note: The Data Model that you upload in this section includes parameters and a trigger for scheduling.

1. Click **Catalog** on the global header.
2. Navigate to My Folders > Learn.
3. In the Tasks pane, click **Upload**.



4. In the Upload dialog box, click **Browse**, navigate to the local folder D:\MyFiles, and select DMTrigger.xdmz.



5. Click **Open** and then click **Upload**.
 6. Verify that the data model file appears in the folder.

Item	Description	Last Modified	Created By
my REVENUE report	Open Schedule Jobs Job History Edit More	8/6/18 10:57 PM	Created By weblogic
My Salary Report - Boiler Plate	Open Schedule Jobs Job History Edit More	8/9/18 9:55 PM	Created By weblogic
My Salary Report - Simple Layout	Open Schedule Jobs Job History Edit More	8/9/18 9:04 PM	Created By weblogic
My Salary Report	Open Schedule Jobs Job History Edit More	8/6/18 10:21 PM	Created By weblogic
Salary Report	Open Schedule Jobs Job History Edit More	8/13/18 7:49 PM	Created By weblogic
Simple Customer Balance	Open Schedule Jobs Job History Edit More	8/17/18 8:19 PM	Created By weblogic
CSVDM	Edit More	8/17/18 8:36 PM	Created By weblogic
DMTrigger	Requires that the demo JDBC connection for BI Publisher is set up.	9/5/18 4:39 PM	Created By weblogic
My Airlines Report	Edit More	8/6/18 10:38 PM	Created By weblogic

Submitting a Job with a Trigger

1. Click **Open > Report Jobs** on the global header.

2. Click the Edit icon for the listed job from the previous practice—SimpleSchedule. (The steps are as given in the previous practice.)

The screenshot shows the 'Manage Report Jobs' interface. At the top, there's a header with 'Home', 'Catalog', 'New', 'Open', 'Signed In As weblogic'. Below the header, it says 'Last Refreshed Sep 05, 2018 04:14:07 PM Western European Summer Time'. There's a 'Return' button and a help icon. A dropdown menu says 'Select time zone to view jobs [GMT+00:00] Casablanca'. Under 'Filters', there are fields for 'Report Job Name' (Contains), 'Report Name' (Contains), 'Status' (All), 'Start Time' (Equals Or Later Than), and 'End Time' (Equals Or Earlier Than). There are also 'Owner' and 'Scope' filters. Below the filters are 'Search' and 'Reset' buttons. The main area is titled 'Report Jobs' with a table. The table has columns: Report Job Name, Report Name, Status, Start Time, End Time, Frequency, Owner, Scope, Edit, and History. One row is shown for 'SimpleSchedule'.

Report Job Name	Report Name	Status	Start Time	End Time	Frequency	Owner	Scope	Edit	History
SimpleSchedule	/Sample Lite/Published Reporting/Reports/Sala...	Active	Sep 05, 2018 04:46:34 PM	Sep 10, 2018 03:46:34 PM	Repeats Daily	weblogic	Public		

3. In Schedule Report Job, on the General tab, select the parameters as given previously (Marketing, Purchasing, and Shipping).
 4. Click the **Schedule** tab.
 5. Keep the frequency as **Once** and select **Run Now**.

The screenshot shows the 'Schedule Report Job' interface. At the top, there's a header with 'Home' and 'Catalog'. Below the header, there's an 'Overview' section with 'General' (Created by weblogic), 'Report Name' (/Sample Lite/Published Reporting/Reports/Salary Report.xdo), 'Schedule' (Start immediately), 'Outputs' (Output1), 'Destination', and 'Notification' (Email). Below the overview, there are tabs: General, Output, **Schedule**, Notification, Diagnostic. The 'Schedule' tab is selected. Under 'Schedule', there's a 'Define Schedule Time' section. It shows 'Frequency' set to 'Once' (highlighted with a red box) and 'Run Now' (radio button selected). The 'Start' date is 'Sep 5, 2018 3:46:34 PM' and the time zone is '[GMT+00:00] Casablanca'. Below this, there's a 'Define Schedule Trigger' section with a 'Use Trigger' checkbox.

6. Select the **Use Trigger** check box. Additional options appear.

Schedule Report Job

Home Catalog New Open

Return

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

Outputs Output1
Destination
Notification Email

General Output **Schedule** Notification Diagnostic

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 returns data, the job will proceed. If no data is returned the occurrence of that job is skipped.

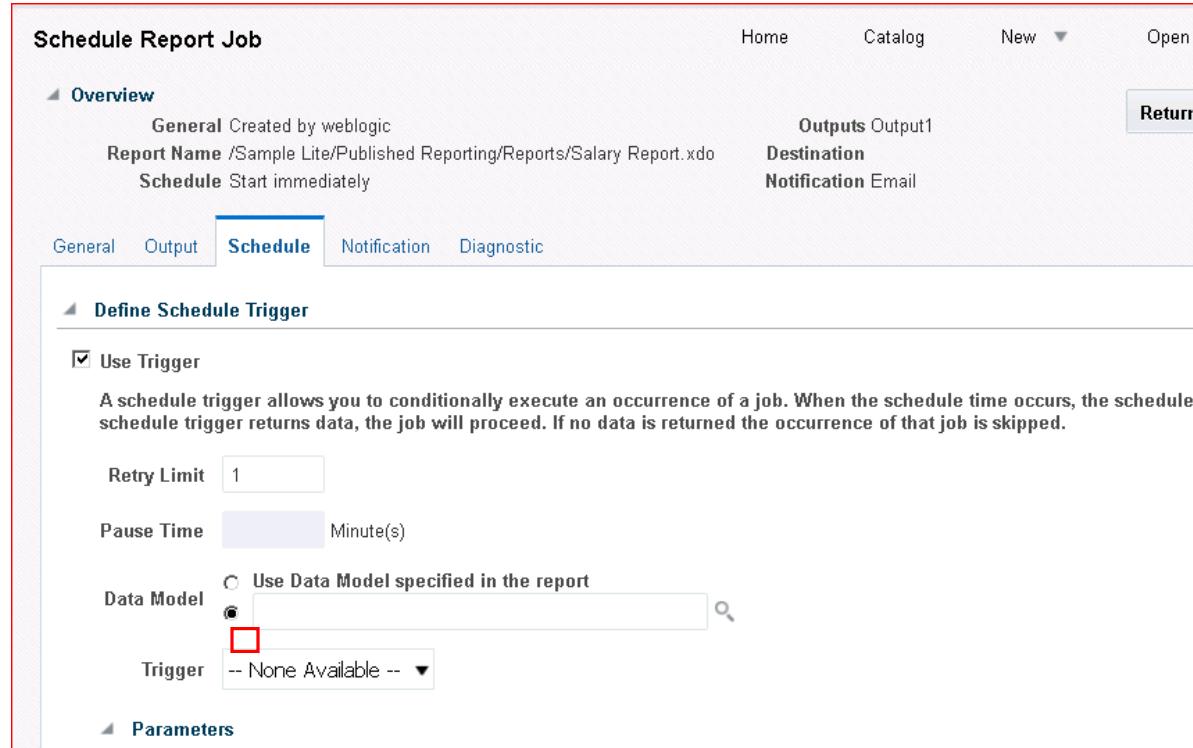
Retry Limit 1

Pause Time Minute(s)

Data Model Use Data Model specified in the report

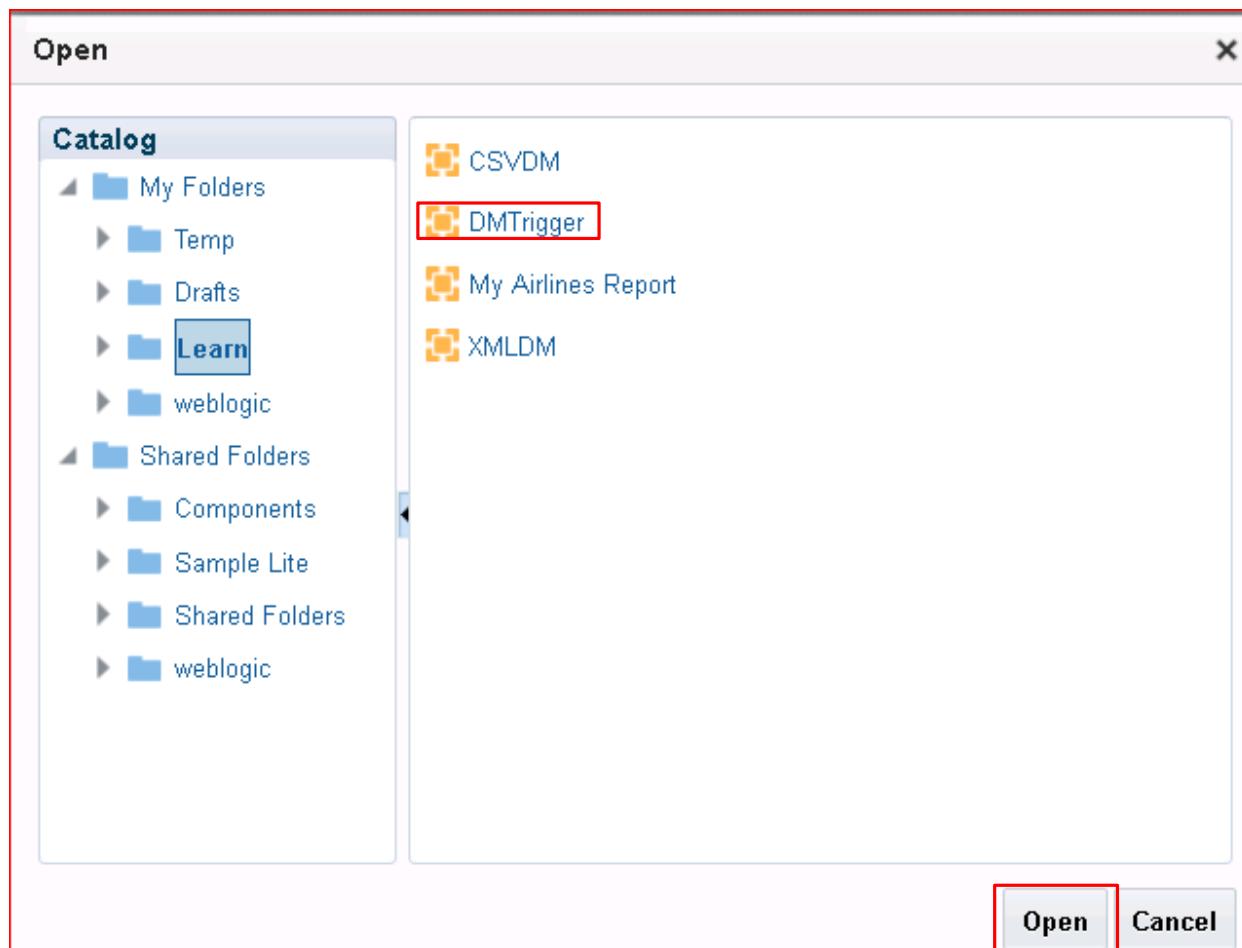
Trigger -- None Available -- ▾

Parameters



7. Select the second option for Data Model and click **Browse** ().

Navigate to the **My Folders > Learn** folder and select **DMTrigger**. This is the same data model you uploaded previously.



8. Click **Open**. The data model appears in the selection field, and a trigger associated with this data model is listed in the Trigger drop-down list.

Schedule Report Job

Home Catalog

Overview

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

Outputs Output1
Destination
Notification Email

General Output **Schedule** Notification Diagnostic

Define Schedule Trigger

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

Retry Limit

Pause Time Minute(s)

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

Trigger

Parameters

9. Click the **Trigger** drop-down list and select **salaryTrig**. Once again, an additional option Parameter appears.

Schedule Report Job

General Created by weblogic

Report Name /Sample Lite/Published Reporting/Reports/Salary Report.xdo

Schedule Start immediately

Outputs C

Destination D

Notification E

General **Output** **Schedule** **Notification** **Diagnostic**

Define Schedule Trigger

Use Trigger

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

Retry Limit 1

Pause Time Minute(s)

Data Model

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

Trigger salaryTrig ▾

Parameters

salary	2000
--------	------

Note: The default SQL selection statement for SalTrig is
select 1 from dual where:sal >2000.

If the trigger parameter is equal to or less than 2000, the statement will be false and the report will not be executed; it will have a status of Skipped.

10. Keep the default value and click **Submit As New**.
11. Name your job **TriggeredSchedule** and submit the same report job again.

12. Change the value for the **salary** text field to 3000.

Schedule Report Job

Home Catalog

Overview

General	Created by weblogic	Outputs	Output
Report Name	/Sample Lite/Published Reporting/Reports/Salary Report.xdo	Destination	
Schedule	Start immediately	Notification	Email

General Output **Schedule** Notification Diagnostic

Define Schedule Trigger

Use Trigger

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

Retry Limit

Pause Time Minute(s)

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

Trigger

Parameters

salary	<input type="text" value="3000"/>
---------------	-----------------------------------

13. Click **Submit As New** and name this job TriggeredSchedule2.
 14. Click Open > Report Job History on the global header. Both the report jobs appear in the Report Job Histories table.

Report Job Histories

[4 Total Report Output]

Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
TriggeredSchedule2	Salary Report.xdo	Success	Sep 05, 2018 04:57:42 PM	Sep 05, 2018 04:57:42 PM	weblogic	Public
TriggeredSchedule	Salary Report.xdo	Skipped	Sep 05, 2018 04:56:25 PM	Sep 05, 2018 04:56:26 PM	weblogic	Public
SimpleSchedule	Salary Report.xdo	Success	Sep 05, 2018 04:46:34 PM	Sep 05, 2018 04:46:34 PM	weblogic	Public
ScheduleNow	Salary Report.xdo	Success	Sep 05, 2018 04:27:56 PM	Sep 05, 2018 04:27:59 PM	weblogic	Public

Observe the following:

- The report job **TriggeredSchedule** has a status Skipped, and not executed, because the trigger parameter returned false.
- The report job **TriggeredSchedule2** has a status Success, and executed, because the trigger parameter is greater than 2000, and returned true.

Practice 9-4: Creating a Report for Bursting and Scheduling the Report to Burst to File Location

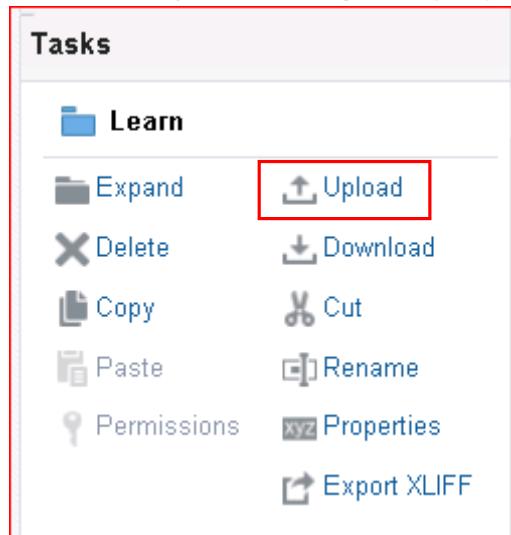
Overview

In this practice, you upload a data model, modify the data model to add bursting, create a new report, and then schedule the report to burst to a file location. You also define the bursting properties for a report.

Tasks

1. From the Catalog, navigate to My Folders > Learn.

2. In the Tasks pane, click **Upload** ().



3. In the Upload dialog box, click **Browse**.



4. Navigate to the MyFiles local folder, and open **BurstingDM.xdmz**. This is a prebuilt data model. Click **Open**.
5. Click **Upload**.

6. The data model appears in the Learn folder. Click **Edit** to edit the data model.

The screenshot shows the Oracle BI Publisher Catalog interface. The top navigation bar includes Home, Catalog, New, Open, and Signed In As (weblogic). The left sidebar has sections for Folders (Drafts, Learn, weblogic, Shared Folders, Components, Sample Lite, Shared Folders) and Tasks (Learn, Expand, Delete, Copy, Upload, Download, Cut). The main content area displays a list of data models under the location /My Folders/Learn. The list includes:

- My Salary Report - Simple Layout** (Last Modified 8/9/18 9:04 PM, Created By weblogic)
- My Salary Report** (Last Modified 8/6/18 10:21 PM, Created By weblogic)
- Salary Report** (Last Modified 8/13/18 7:49 PM, Created By weblogic)
- Simple Customer Balance** (Last Modified 8/17/18 8:19 PM, Created By weblogic)
- BurstingDM** (Last Modified 9/5/18 5:20 PM, Created By weblogic)
 - Requires that the demo JDBC connection for BI Publisher is set up.
 - Buttons: Edit, More
- CSVDM** (Last Modified 8/17/18 8:36 PM, Created By weblogic)
 - Buttons: Edit, More
- DMTrigger** (Last Modified 9/5/18 4:39 PM, Created By weblogic)
 - Requires that the demo JDBC connection for BI Publisher is set up.
 - Buttons: Edit, More

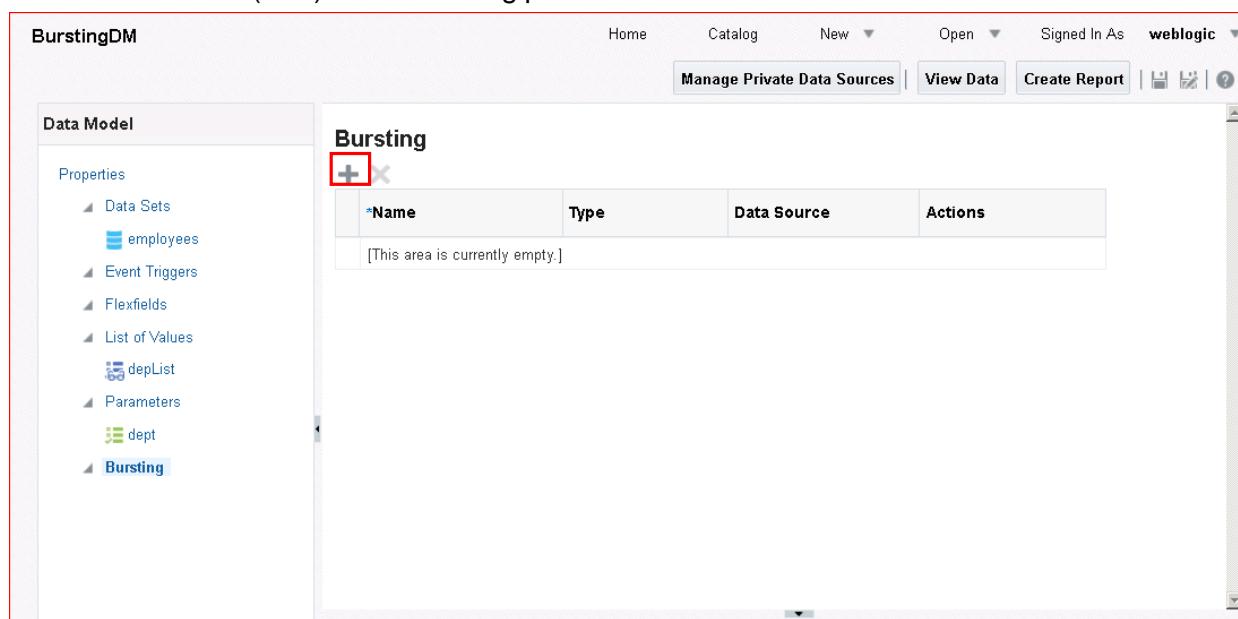
7. The data model is opened in the data model editor. Observe the data source settings and the predefined parameters.

The screenshot shows the BurstingDM data model editor. The top navigation bar includes Home, Catalog, New, Open, Signed In As (weblogic), and buttons for Manage Private Data Sources, View Data, and Create Report. The left sidebar shows the Data Model structure with sections: Properties (selected), Data Sets (employees, Event Triggers, Flexfields, List of Values (depList), Parameters (dept), Bursting), and Bursting. The main Properties panel contains the following settings:

- Description:** Requires that the demo JDBC connection for BI Publisher is set up.
- Default Data Source:** demo
- Oracle DB Default Package:** [empty field]
- Database Fetch Size:** 300
- Query Time Out:** [empty field]
- Scalable Mode:** Instance Level
- Enable SQL Pruning:** Instance Level
- Enable SQL session trace:** Instance Level, SQL Trace Name: [empty field]
- Backup Data Source:** Enable Backup Connection
 - Switch to Backup Data Source when Primary Data Source is unavailable
 - Use Backup Data Source only

8. Click the **Bursting** node in the Data Model pane.

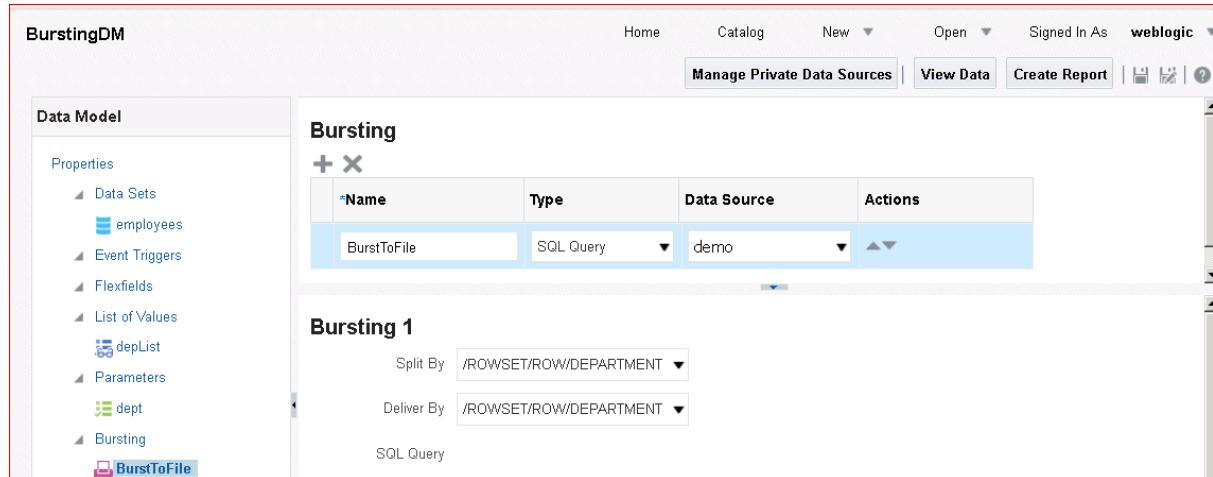
Click the Add icon () in the Bursting pane.



9. The Bursting pane expands and provides an additional definition area.

10. Enter the following information in the two Bursting panes:

Step	Attribute or Field	Choices or Values
a.	Name	BurstToFile
b.	Type	SQL Query
c.	Data Source	demo
d.	Split By	/ROWSET/ROW/DEPARTMENT_NAME
e.	Deliver By	/ROWSET/ROW/DEPARTMENT_NAME



11. In the SQL Query pane below the Query Builder button, copy and paste the following code:

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

Bursting

+ X

*Name	Type	Data Source	Actions
BurstToFile	SQL Query	demo	▲▼

Bursting 1

Split By /ROWSET/ROW/DEPARTMENT ▼

Deliver By /ROWSET/ROW/DEPARTMENT ▼

SQL Query

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

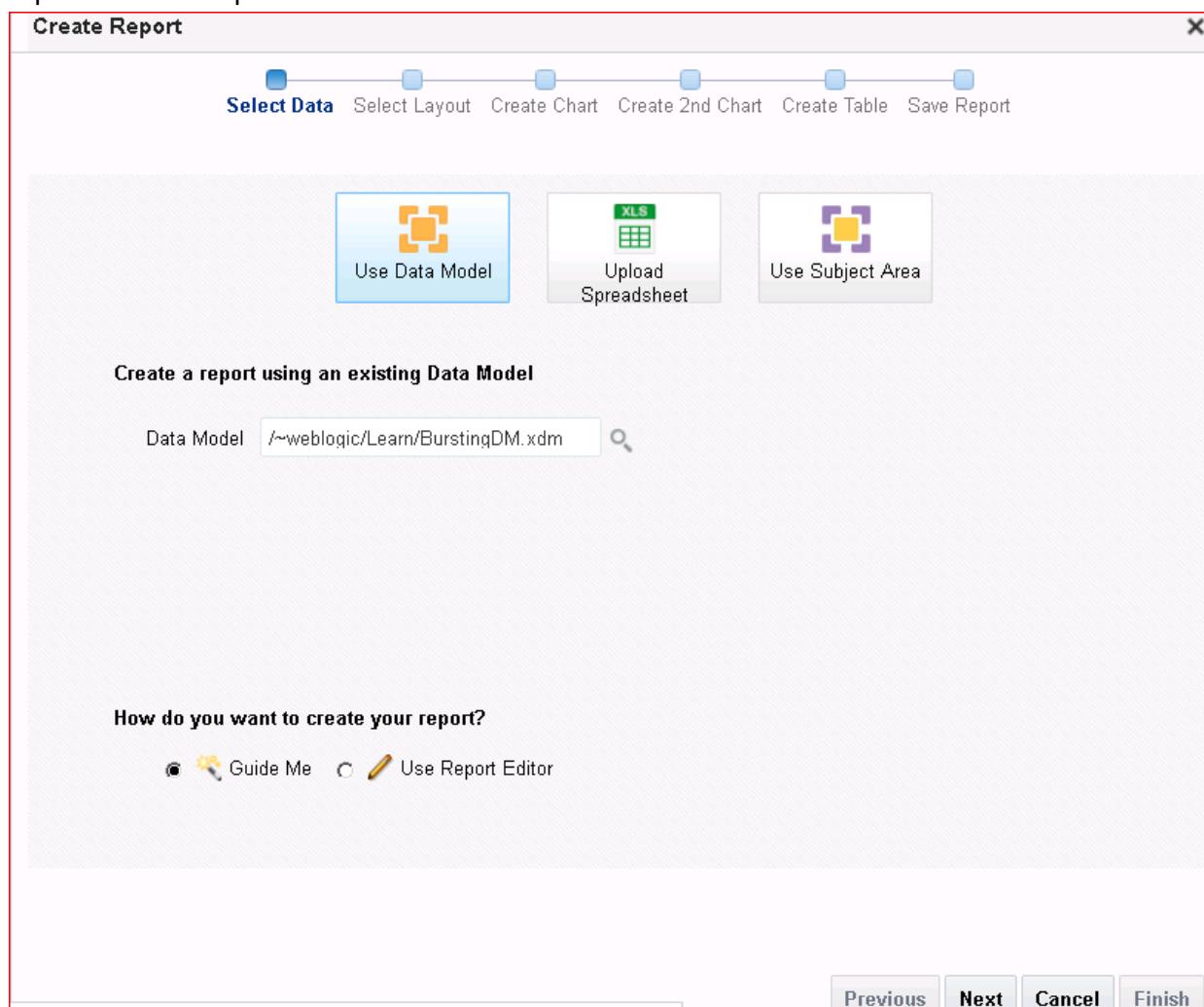
Your output will be delivered to a local directory D:\Learn. Notice that the code shows PDF as the selected output format.

12. View the data output and save the sample data. Save the data model.

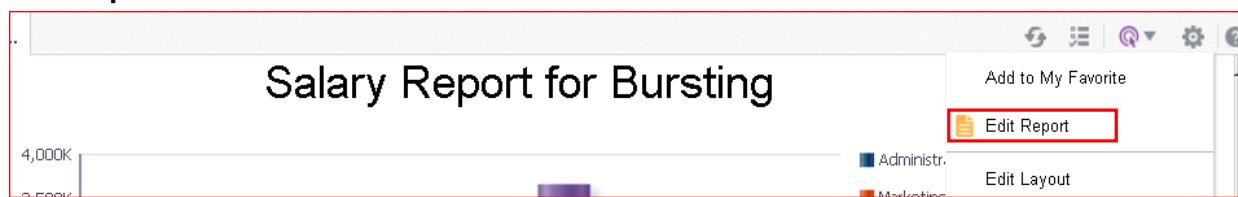
The screenshot shows the Oracle Database Data Modeler application window titled "BurstingDM". The top navigation bar includes "Home", "Catalog", "New", "Open", "Signed In As weblogic", and "Manage Private Data Sources", "View Data", "Create Report", and other icons. The main area is divided into sections: "Data Model" (Properties, Data Sets, Event Triggers, Flexfields, List of Values, Parameters, dept, Bursting, BurstToFile), "Diagram", "Structure", "Data" (selected), and "Code". The "Data" tab displays a "Department All" view with a "ROWSET" containing two "ROW"s. The first row represents Jennifer Whalen with attributes: NAME (Jennifer Whalen), FIRST_NAME (Jennifer), LAST_NAME (Whalen), SALARY (4400), ANNUAL_SALARY (52800), FED_WITHHELD (14784), JOB_TITLE (Administration Assistant), DEPARTMENT_NAME (Administration), and MANAGER (Neena Kochhar). The second row represents Michael Hartstein with attributes: NAME (Michael Hartstein), FIRST_NAME (Michael), and LAST_NAME (Hartstein). Below the rows are buttons for "Rows" (set to 5), "View", "Export", "Save As Sample Data" (which is highlighted with a red box), and "View Engine Log".

13. Click **Create Report** to create a new report based on this data model.

14. The Create Report Wizard is opened with the current data model for bursting. Create the report with the help of the wizard.



15. Save it as "Salary Report for Bursting."
16. The report is displayed in Report Viewer. Use the Actions menu to edit the report. Click **Edit Report**.

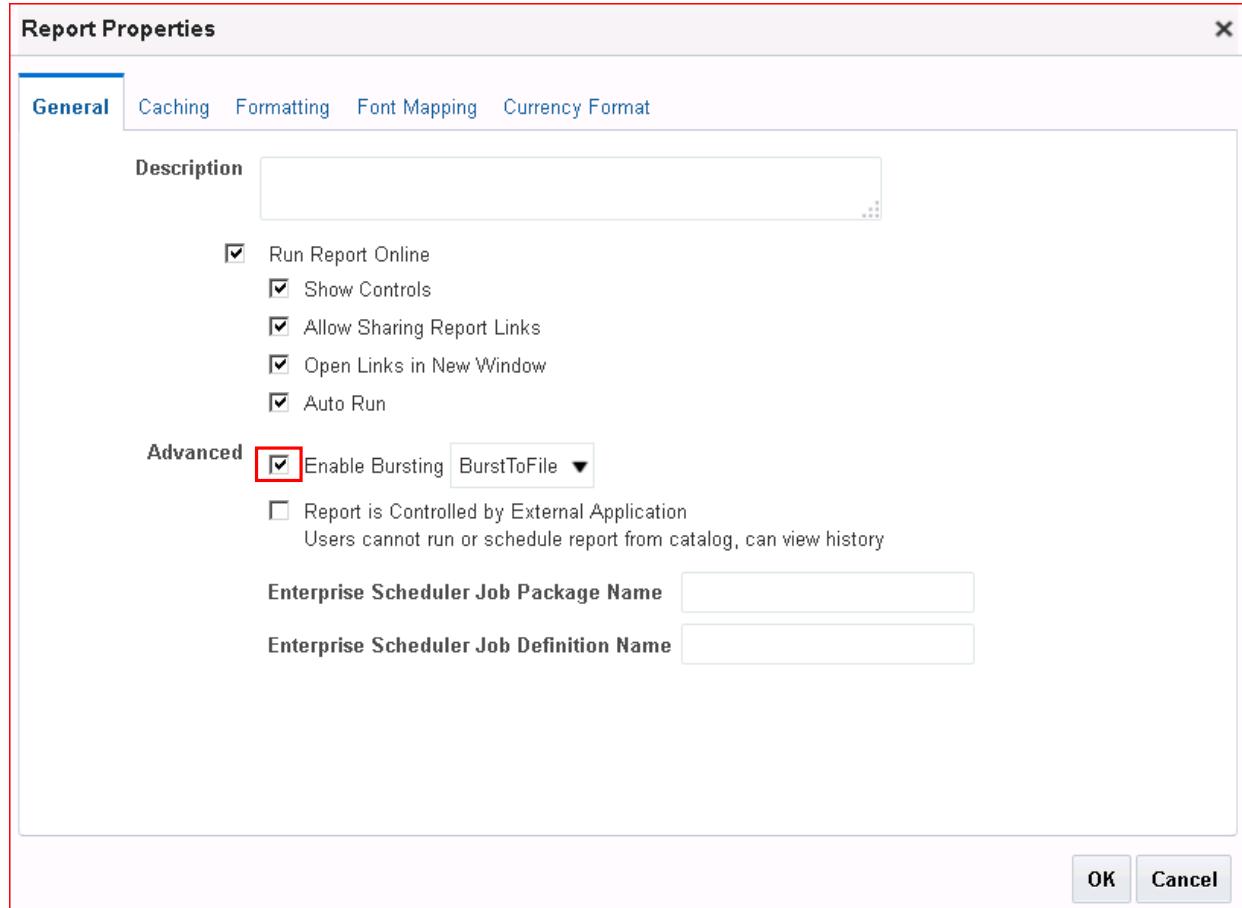


17. The report is displayed in Report Editor.



Click the **Properties** link (). The Report Properties dialog box appears.

18. On the **General** tab in the Advanced area, select the **Enable Bursting** check box and ensure that "BurstToFile" is selected from the drop-down list.



19. Click **OK**.
20. Save and view the report.
21. In the Report Viewer window, click **Schedule** from the actions menu.

22. The Schedule Report Job window is opened with the report selected. On the General tab, specify the Department parameters for display as Administration, Purchasing, and Shipping.

Schedule Report Job Home

Overview

General Created by weblogic
Report Name /~weblogic/Learn/Salary Report for Bursting.xdo
Schedule Start immediately

Outputs View bursting defin
Destination
Notification

General **Output** **Schedule** **Notification** **Diagnostic**

Report /~weblogic/Learn/Salary Report for Bu 🔍

Parameters

Department	Administration;Purchasing;Sh
<input type="checkbox"/> All	
<input checked="" type="checkbox"/> Administration	
<input type="checkbox"/> Marketing	
<input checked="" type="checkbox"/> Purchasing	
<input type="checkbox"/> Human Resources	
<input checked="" type="checkbox"/> Shipping	

Search ... F12

23. On the **Output** tab, select the “Use Bursting Definition to Determine Output & Delivery Destination” check box to enable bursting. Other options for output will be hidden when this check box is selected.

Schedule Report Job

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

Overview

General Created by weblogic
Report Name /~weblogic/Learn/Salary Report for Bursting.xdo
Schedule Start immediately

Outputs View bursting definition
Destination
Notification

Return **Submit** ?

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.

24. On the **Schedule** tab, select the options **Once** and **Run now**.

25. Submit the report.

26. Name the job **BurstingtoFile**. Click **OK**.

Submit

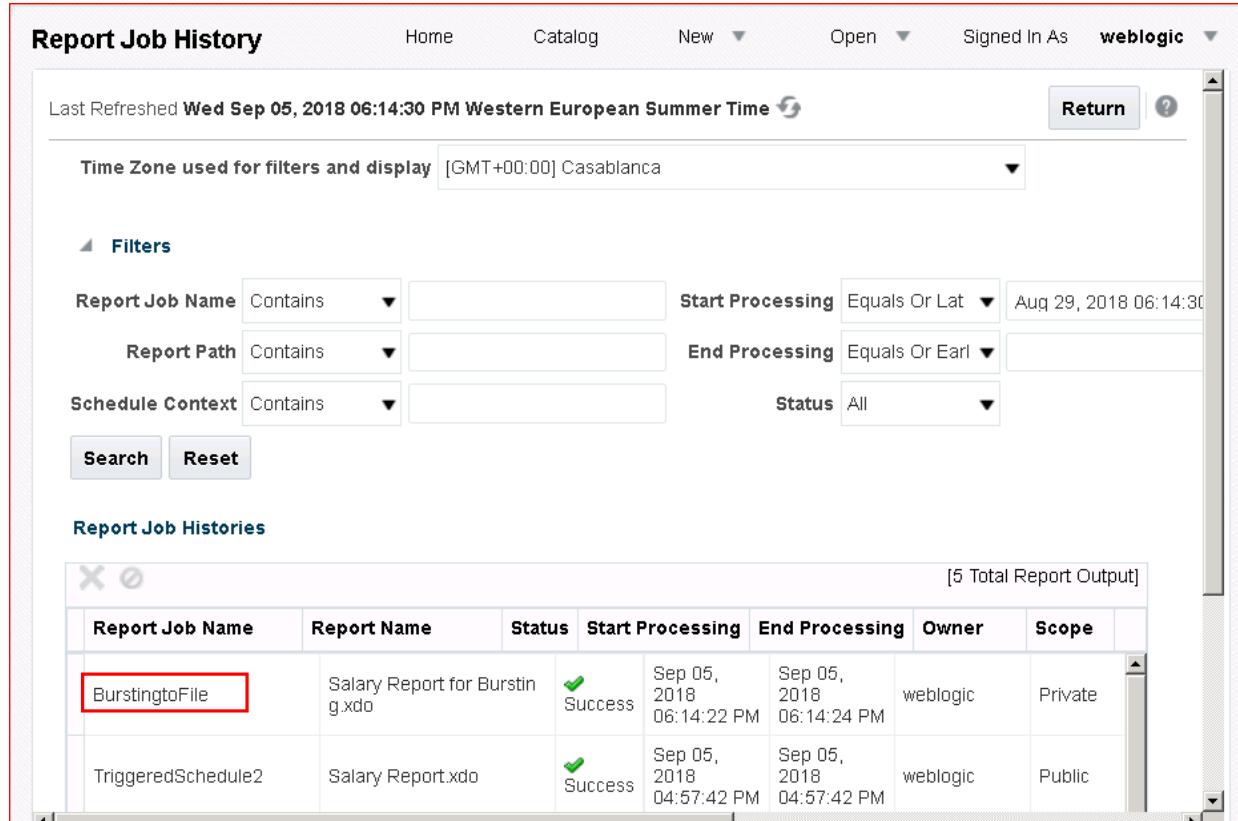
Report /~weblogic/Learn/Salary Report for Bursting.xdo
Parameters Department:Administration;Purchasing;Shipping
Schedule Start immediately
Output View bursting definition
Notification
Trigger Data Model
Trigger Name
Trigger Retry Limit
Trigger Pause Time
Trigger Parameters

Report Job Name

OK **Cancel**

27. After you receive confirmation, open Report Job History from the global header.

28. The Report Job Histories table displays the bursting job submitted.



The screenshot shows the 'Report Job History' page with a red border around the main content area. At the top, there are navigation links: Home, Catalog, New, Open, Signed In As (weblogic), Return, and Help. Below the navigation is a message: 'Last Refreshed Wed Sep 05, 2018 06:14:30 PM Western European Summer Time'. A dropdown menu for 'Time Zone used for filters and display' is set to [GMT+00:00] Casablanca. Under the 'Filters' section, there are four filter criteria: 'Report Job Name' (Contains: BurstingtoFile), 'Start Processing' (Equals Or Later: Aug 29, 2018 06:14:30), 'Report Path' (Contains: TriggeredSchedule2), and 'End Processing' (Equals Or Earlier: Sep 05, 2018 06:14:24). The 'Status' dropdown is set to All. Below the filters are 'Search' and 'Reset' buttons. The main area is titled 'Report Job Histories' and contains a table with the following data:

Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
BurstingtoFile	Salary Report for Bursting.xdo	Success	Sep 05, 2018 06:14:22 PM	Sep 05, 2018 06:14:24 PM	weblogic	Private
TriggeredSchedule2	Salary Report.xdo	Success	Sep 05, 2018 04:57:42 PM	Sep 05, 2018 04:57:42 PM	weblogic	Public

Click the job name **BurstingtoFile** to view the details.

29. The Report Job History details are displayed. Observe that the output has been split by the parameters selected while scheduling the report.



The screenshot shows the 'Output & Delivery' page with a red border around the main content area. At the top, there are links for XML Data, Diagnostic Log, and Republish. A dropdown menu for 'Status' is set to All. Below the status dropdown is a table titled 'Output & Delivery' with the following data:

Output Name	Template	Format	Locale	Time Zone
BurstingtoFile	SimpleRTF	PDF	English (United States)	
BurstingtoFile	SimpleRTF	PDF	English (United States)	
BurstingtoFile	SimpleRTF	PDF	English (United States)	

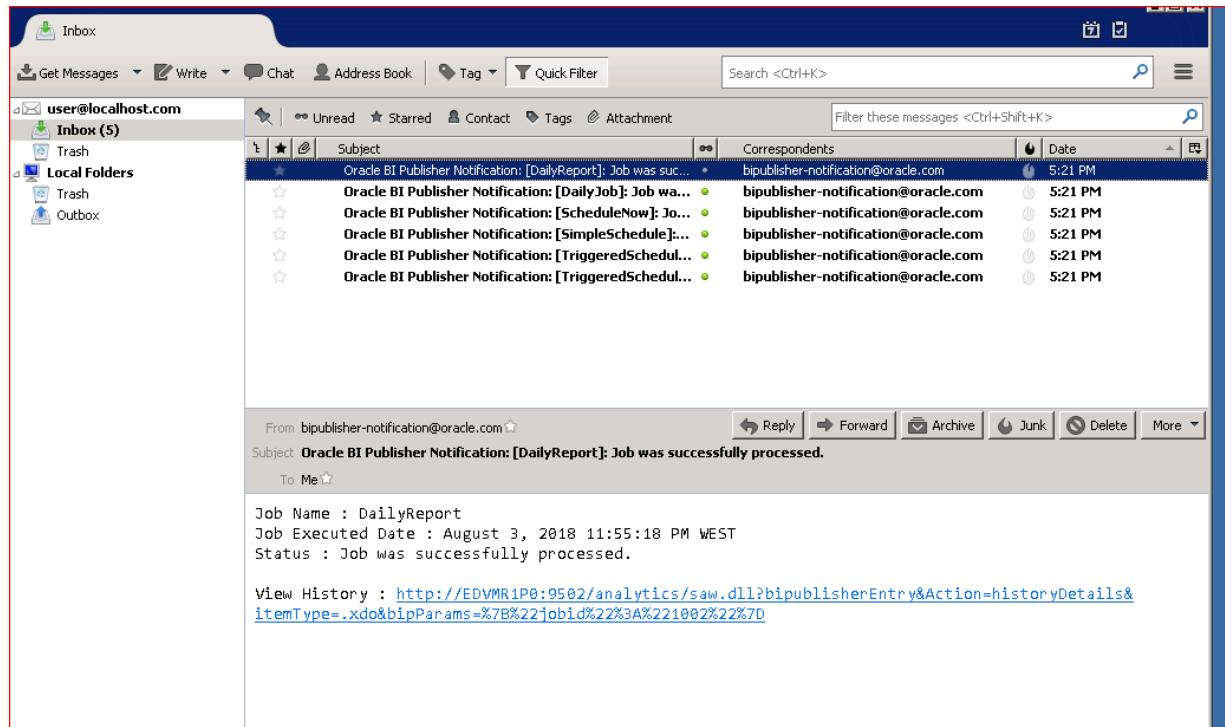
30. Expand any of the BurstingtoFile output names and you will see the PDF file name and location.

The screenshot shows the 'Output & Delivery' configuration screen. At the top, there are tabs for 'XML Data' and 'Diagnostic Log'. Below that is a status dropdown set to 'All'. The main area displays two 'BurstingtoFile' entries. The first entry is expanded, revealing its template as 'SimpleRTF', format as 'PDF', locale as 'English (United States)', and time zone as 'English (United States)'. It also shows a 'Split Key and Value' section with 'Purchasing' selected. Under 'Delivery 1: File', it specifies a directory of 'D:\Learn' and a file name of 'Purchasing.pdf'. The 'Last Updated' timestamp is '9/5/18 6:14:24 PM WEST'. A green checkmark indicates the status is successful. The second 'BurstingtoFile' entry is collapsed.

31. Navigate to the D:/Temp folder and review the contents.

The screenshot shows a Windows File Explorer window with the path 'Computer > WINNT (D:) > Learn'. The left sidebar shows 'Favorites' (Desktop, Downloads, Recent Places), 'Libraries' (Documents, Music, Pictures, Videos), and 'Computer' (WINNT (D:), CD Drive (E:)). The main pane lists files in the 'Learn' folder, which includes 'Administration.pdf', 'Balance Letter Datamodel_.xml', 'Balance Letter Start.rtf', 'Employees by Department DM_.xml', 'Manager Financials report.rtf', 'Purchasing.pdf', 'Retail Sales.rtf', 'RetailSales.xml', 'Salary Report.rtf', 'Shipping.pdf', 'test.rtf', and 'test.xls'. Three specific files are highlighted with red boxes: 'Administration.pdf', 'Purchasing.pdf', and 'Shipping.pdf'.

32. If you have time, open Mozilla Thunderbird and check whether you have received the notifications.



33. Click the URL provided in the notification. If necessary, modify the URL by changing the machine name to **localhost**. You will be on the Report Job History page.

The screenshot shows the 'Report Job History' page. At the top, it displays general information about the report job, including its ID (1002), name (DailyReport), owner (weblogic), and scope (Private). It also shows the scheduled start time (8/3/18 11:55:17 PM WEST) and the trigger parameters. The 'Report Job Execution Information' section indicates a success status with a green checkmark, showing the start and end processing times and the total elapsed time (1.235 seconds).

The page is divided into sections: 'Report Parameters' (Employee: All, Department: All) and 'Output & Delivery'. Under 'Output & Delivery', there is a table showing the output configuration:

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

Practices for Lesson 10:
Integrating BI Publisher with
Oracle BI Enterprise Edition

Practices for Lesson 10: Overview

Goal

To create BI Publisher reports based on BI Server and BI Analysis as data sources, and add the reports to the Oracle BI EE dashboard. You will also export these reports in MS Excel from the dashboard.

Practices Overview

You begin by reviewing the System Maintenance – Sever Configuration page. You create a report based on a BI Server SQL query. You create an Oracle BI analysis and then create a data model and a BI Publisher report based on the BI analysis. You then add these reports to an Oracle BI EE dashboard and download the data to MS Excel.

Time

35–45 minutes

Practice 10-1: Viewing Presentation Catalog Integration Details

Overview

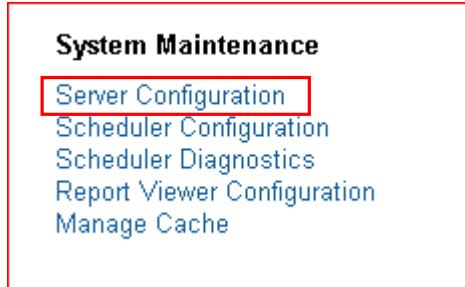
In this practice, you open the Administration page and view server configuration details.

Assumptions

You have enabled integration with Oracle BI EE.

Tasks

1. Log in to BI Publisher.
2. Click Administration > Server Configuration, located in the System Maintenance grouping.



3. The System Maintenance > Server Configuration page appears. As mentioned in the lesson, this page allows you to configure BI Publisher to use the Presentation Catalog. Review the details, but **do not** make any changes.

A screenshot of the 'Administration > Server Configuration' page. The 'Catalog' tab is selected. The page displays the following information:

- Catalog Type: Oracle BI EE Catalog
- Server Version: v7
- Connection protocol: TCP
- Test Connection button
- BI Publisher repository: D:/Oracle/Middleware/Oracle_Home/user_projects/domains/bi_foundation/bidata/components/bipublisher/repository
- BI Search URL: http://EDVMR1P0:9505/bisearch/rest/BISearchQueryService/search
- BI Search Group name: bisearch_ws
- BI Search Timeout (millisecond): 6000

4. Click **Cancel**.

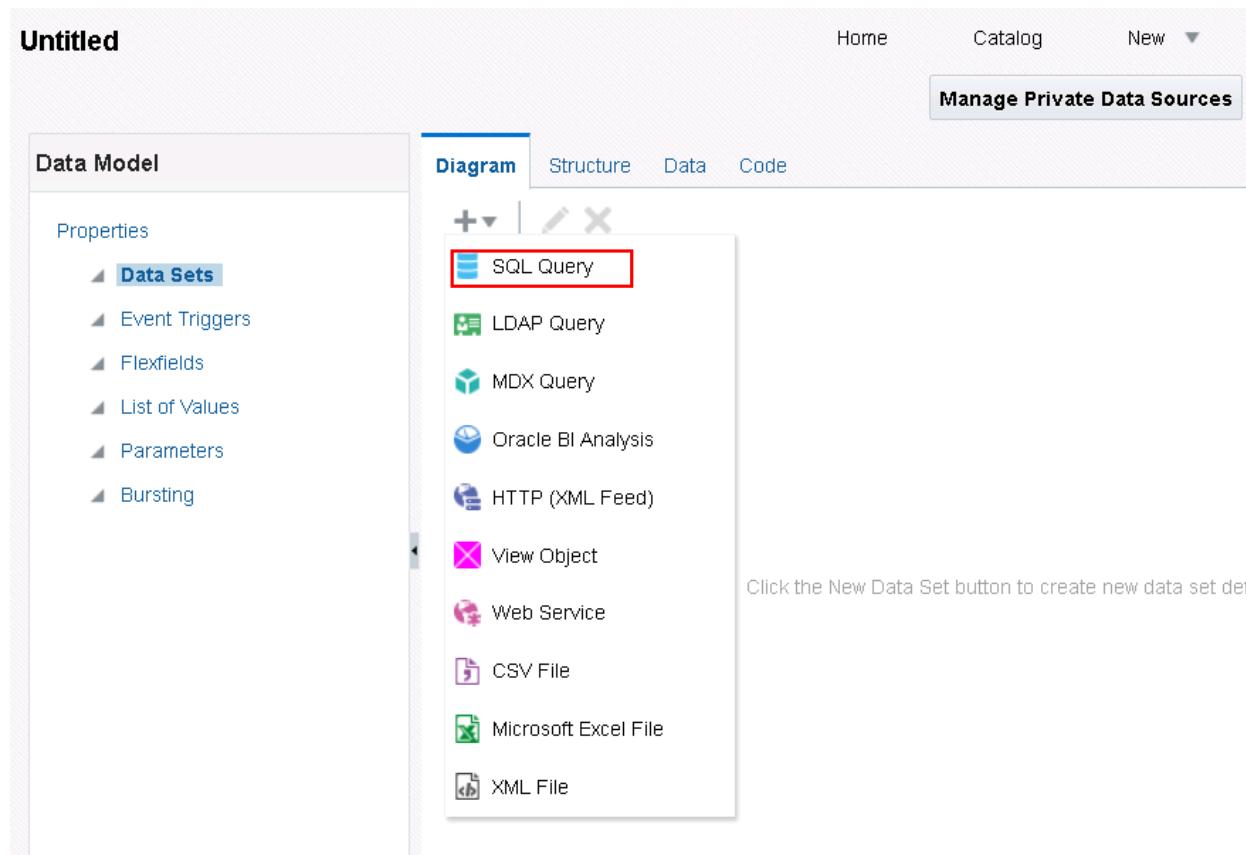
Practice 10-2: Creating a Data Model and Report Based on an Oracle BI Server SQL Data Set

Overview

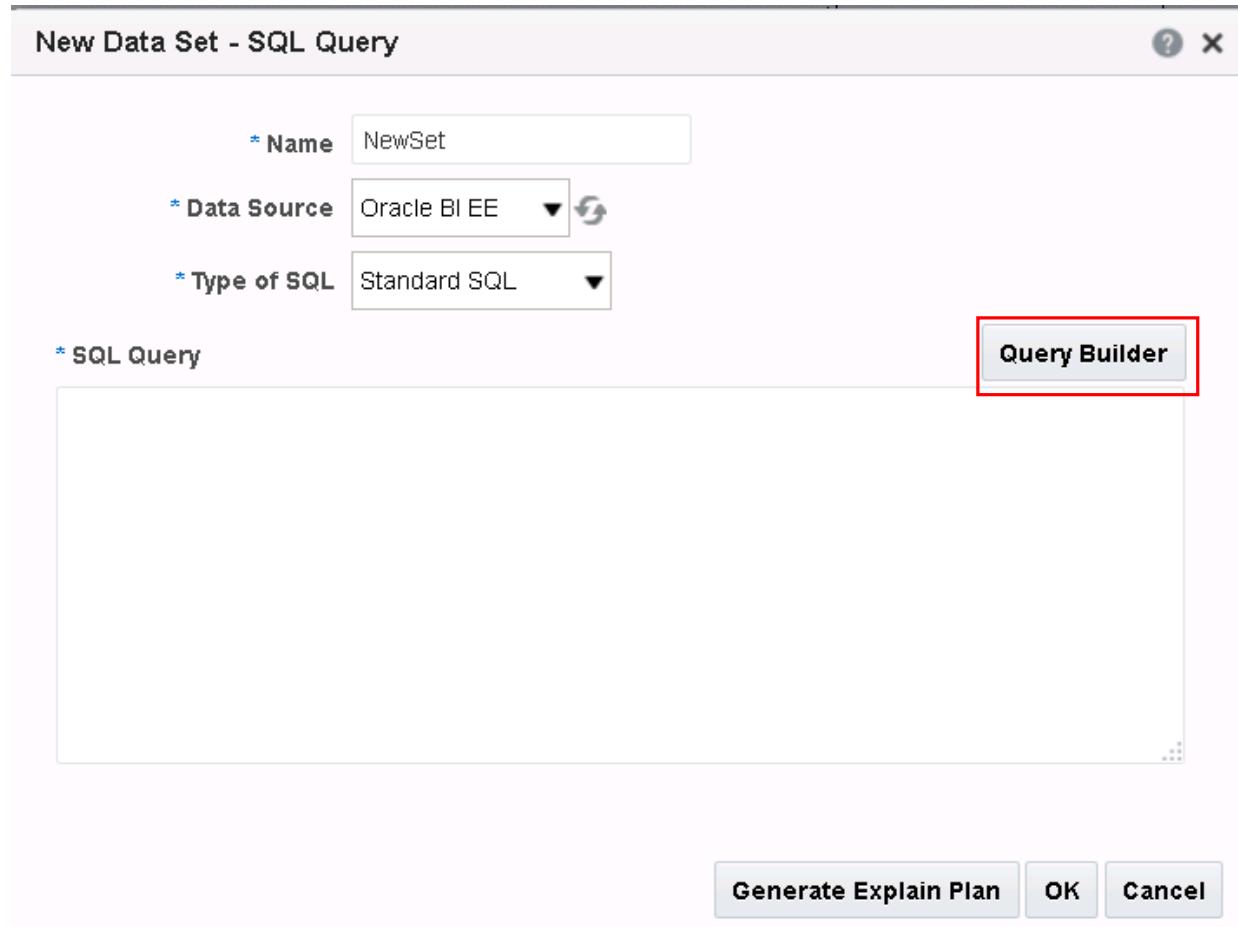
In this practice, you create a data model and report from an Oracle BI Server SQL data set.

Tasks

1. Log back in to BI Publisher and then click New > Data Model.
2. In the Data Model pane, select **Data Sets**, and then click **Data Sets > SQL Query**.

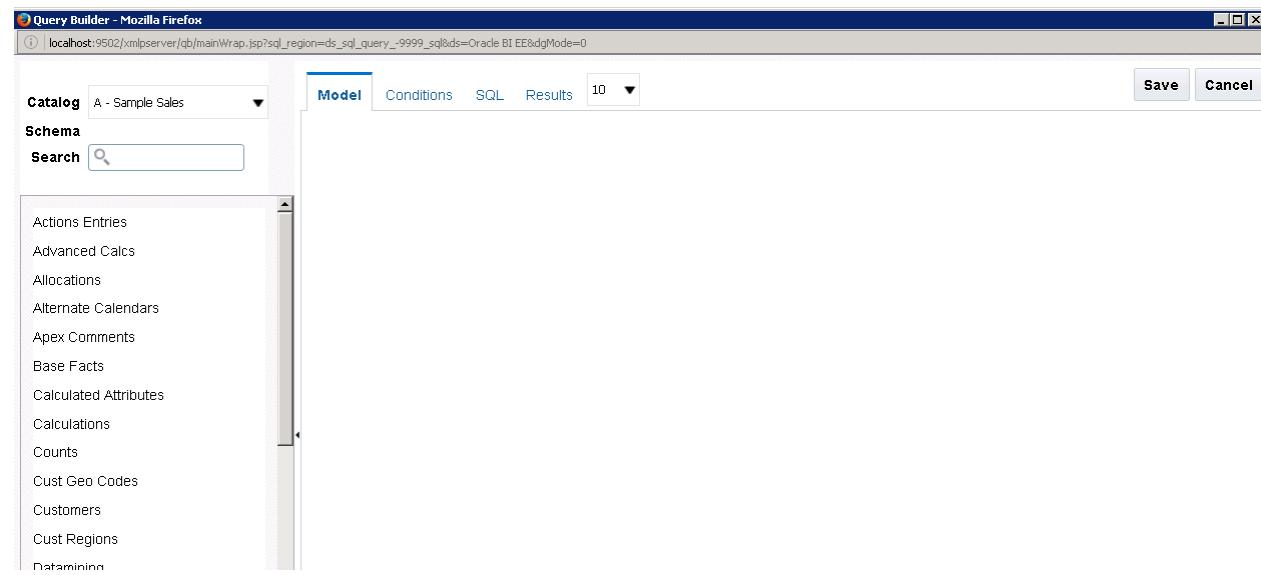


3. In the New Data Set – SQL Query dialog box, enter **NewSet** in the Name text box.



4. Select **Oracle BI EE** as the Data Source. Observe that you have selected Oracle BI EE as the data source unlike the usual **demo** or the private JDBC connections that you have used earlier.

5. Click **Query Builder**. The Query Builder window opens with the schema available for the selected data source.



6. In Query Builder, select the following tables: **Time**, **Orders**, **Products**, **Orders Dates**, and **Base Facts**.
7. Select the following columns from each table:

Step	Table Name	Column
a.	Time	Per Name Qtr
b.	Orders	Order Status
c.	Products	Product
d.	Orders Dates	Order Date
e.	Base Facts	Billed Quantity
f.	Base Facts	Discount Amount

The Model pane should look like this:

The Model pane displays five data sources:

- Time:** Contains items T00 Calendar Date, T01 Per Name Week, T02 Per Name Month, T03 Per Name Qtr (checked), T04 Per Name Half, and T05 Per Name Year.
- Orders:** Contains items R1 Order Status (checked), R2 Order Type, R3 Order Currency, R5 Order Discount Rate, R6 Transactional Order Number, and R0 Order Key.
- Products:** Contains items P1 Product (checked), P2 Product Type, P3 LOB, P4 Brand, P0 Product Number, P5 Attribute 1, and P6 Attribute 2.
- Orders Dates:** Contains items R11 Order Date-Time (checked), R12 Order Month, R13 Order Year, R14 Billed Date, and R15 Billed Month.
- Base Facts:** Contains items 1- Revenue, 2- Billed Quantity (checked), 3- Discount Amount (checked), 4- Paid Amount, and 5- Target Revenue.

Note that you do not have to create any joins, because they are created in OBI EE.

- Click **Conditions**. Sort first on **Per Name Qtr** and then on **Product**.

Column	Alias	Object	Condition	Sort Type	Sort Order	Show	Function
T03 Per Name Qtr	T03 Per Name Qtr	Time		ASC	1	✓	
R1 Order Status	R1 Order Status	Orders		ASC		✓	
P1 Product	P1 Product	Products		ASC	2	✓	
2- Billed Quantity	2- Billed Quantity	Base Facts		ASC		✓	
3- Discount Amount	3- Discount Amount	Base Facts		ASC		✓	
R11 Order Date-Time	R11 Order Date-Time	Orders Dates		ASC		✓	

9. Click **SQL** to view the code.

Model Conditions **SQL** Results 10 ▾

Only use default schema

```
select    "Time"."T03 Per Name Qtr" as "T03 Per Name Qtr",
          "Orders"."R1 Order Status" as "R1 Order Status",
          "Products"."P1 Product" as "P1 Product",
          "Base Facts"."2- Billed Quantity" as "2- Billed Quantity",
          "Base Facts"."3- Discount Amount" as "3- Discount Amount",
          "Orders Dates"."R11 Order Date-Time" as "R11 Order Date-Time"
     from    "A - Sample Sales"."Base Facts" "Base Facts",
             "A - Sample Sales"."Orders" "Orders",
             "A - Sample Sales"."Products" "Products",
             "A - Sample Sales"."Orders Dates" "Orders Dates",
             "A - Sample Sales"."Time" "Time"
    order by "Time"."T03 Per Name Qtr" ASC, "Products"."P1 Product" ASC
```

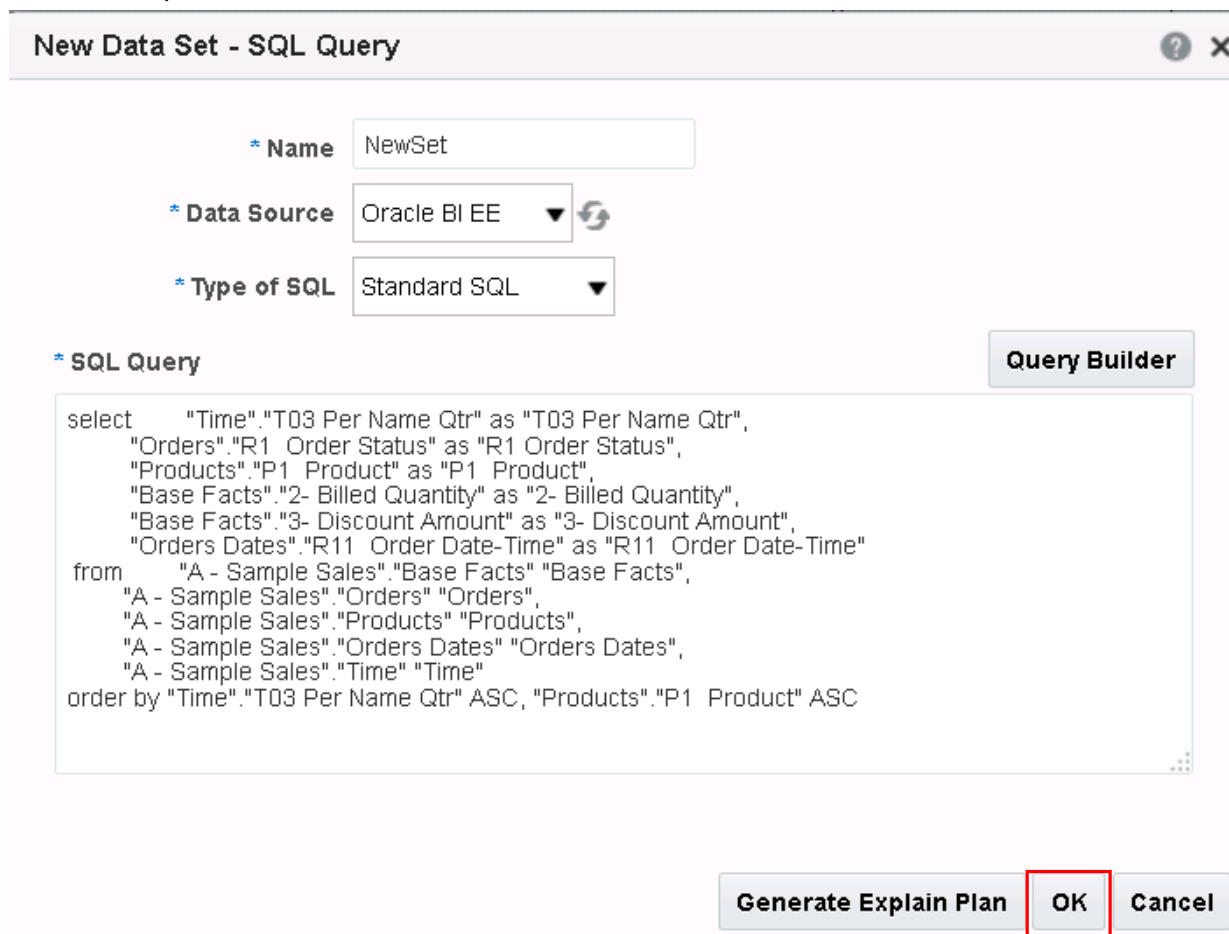
10. Click **Results**. The results appear.

Model Conditions SQL **Results** 10 ▾

T03 Per Name Qtr	R1 Order Status	P1 Product	2- Billed Quantity	3- Discount Amount	R11 Order Date-Time
2008 Q1	5-Paid	7 Megapixel Digital Camera	390	40.0	2007-12-19 00:00:00.0
2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	193	0.0	2007-12-22 00:00:00.0
2008 Q1	5-Paid	7 Megapixel Digital Camera	253	0.0	2007-12-25 00:00:00.0
2008 Q1	9-On Hold	7 Megapixel Digital Camera	279	0.0	2007-12-26 00:00:00.0
2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	338	58.0	2007-12-31 00:00:00.0
2008 Q1	1-Booked	7 Megapixel Digital Camera	349	0.0	2008-01-04 00:00:00.0
2008 Q1	5-Paid	7 Megapixel Digital Camera	293	71.0	2008-01-04 00:00:00.0
2008 Q1	6-Cancelled	7 Megapixel Digital Camera	241	0.0	2008-01-06 00:00:00.0
2008 Q1	4-Billed	7 Megapixel Digital Camera	311	26.0	2008-01-07 00:00:00.0
2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	448	44.0	2008-01-10 00:00:00.0

11. Click **Save**.

12. Click **OK** in the New Data Set – SQL Query dialog box. The new data set appears in the data model pane.



13. Click the Structure tab to change the display names for the data elements. Change the display names as given below:

Step	Data Source Column Name	Display Name
a.	PER NAME QTR	Qtr
b.	ORDER STATUS	Order Status
c.	PRODUCT	Product
d.	BILLED QUANTITY	Billed Qty
e.	DISCOUNT AMOUNT	Disc Amt
f.	ORDER DATE	Order Date

The Structure tab should look like this:

The screenshot shows the BI Publisher interface with the 'Structure' tab selected. At the top, there are tabs for 'Diagram', 'Structure' (which is highlighted in blue), 'Data', and 'Code'. Below the tabs, there are two main sections: 'Table View' and 'Output'. The 'Table View' section contains a table with columns for Data Source, XML Tag Name, Sorting, Value If Null, Display Name, and Data Type. The table rows correspond to the steps listed in the table above, with icons indicating the type of data element (e.g., A for attribute, # for quantity, E for expression). The 'Business View' section is visible on the right side of the table.

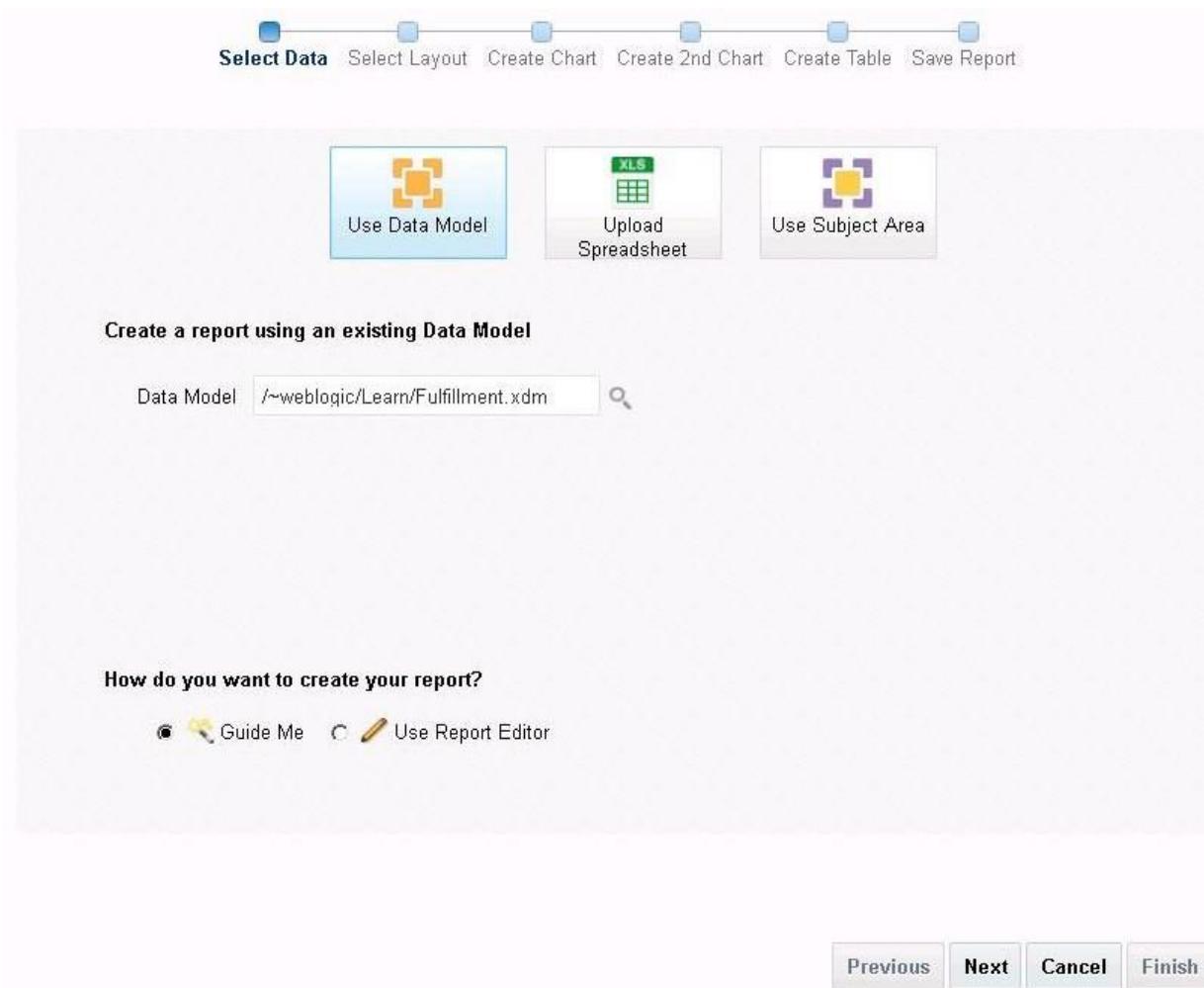
Data Source	XML View			Business View	
	XML Tag Name	Sorting	Value If Null	Display Name	Data Type
Report Data					
Data Structure	DATA_DS				
NewSet	G_1				
A T03 Per Name Qtr	T03_Per_Name_Qtr			Qtr	A
A R1 Order Status	R1_Order_Status			Order Status	A
A P1 Product	P1_Product			Product	A
# 2-Billed Quantity	2_Billed_Quantity			Billed Qty	#
#E 3- Discount Amount	3_Discount_Amt			Disc Amt	#E
R11 Order Date-Time	R11_Order_Date_Time			Order Date	R

14. Click the Data tab to view the data and select 5 Rows, and click View.

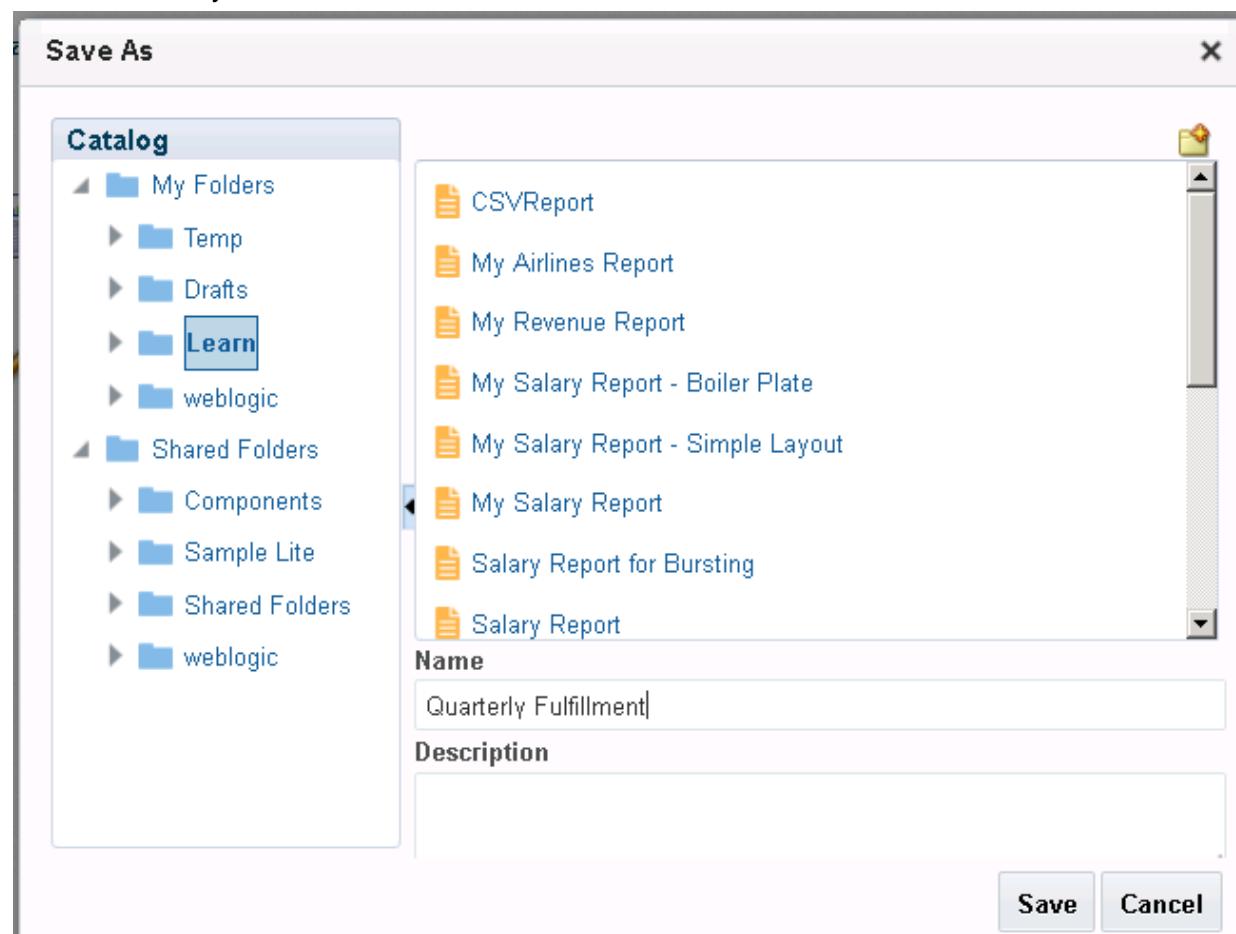
The screenshot shows the Oracle BI Publisher interface with the 'Data' tab selected. The toolbar at the top includes 'Diagram', 'Structure', 'Data' (selected), and 'Code'. Below the toolbar, there are buttons for 'Rows' (set to 5), 'View' (highlighted with a red box), 'Export', 'Save As Sample Data' (highlighted with a red box), and 'View Engine Log'. The main area displays a tree structure under 'DATA_DS'. The first node is 'G_1' with the following children:
T03_PER_NAME_QTR (2008 Q1)
R1_ORDER_STATUS (5-Paid)
P1_PRODUCT (7 Megapixel Digital Camera)
_2_BILLED_QUANTITY (390)
_3_DISCOUNT_AMOUNT (40.0)
R11_ORDER_DATE_TIME (2007-12-19T00:00:00.000+00:00)
The second 'G_1' node has similar structure but with different values for R1_ORDER_STATUS (2-Fulfilled) and _2_BILLED_QUANTITY (193). The third 'G_1' node has the same structure as the first two.
The text below the interface states: "The data is displayed in a tree format. Click the Save As sample data. Save the data model as **Fulfillment** in the folder My Folders/Learn."

15. Click **Create Report** to create a new report from this data model.

16. The Create Report Wizard is opened.



17. Follow the steps in the wizard to create the report and save the report as Quarterly Fulfillment in My Folders/Learn.



18. After saving, the report is displayed in the Report Viewer.

The screenshot shows a report viewer interface with a top navigation bar containing 'Home', 'Catalog', 'New ▾', 'Open ▾', and 'Signed In'. Below the navigation is a toolbar with icons for search, refresh, and other functions. The main content area is titled 'Quarterly Fulfillment' and displays a table with the following data:

Qtr	Order Status	Product	Billed Qty	Disc Amt
2008 Q1	5-Paid	7 Megapixel Digital Camera	390	40
2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	193	0
2008 Q1	5-Paid	7 Megapixel Digital Camera	253	0
2008 Q1	9-On Hold	7 Megapixel Digital Camera	279	0
2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	338	58
2008 Q1	1-Booked	7 Megapixel Digital Camera	349	0
2008 Q1	5-Paid	7 Megapixel Digital Camera	293	71
2008 Q1	6-Cancelled	7 Megapixel Digital Camera	241	0
2008 Q1	4-Billed	7 Megapixel Digital Camera	311	26
2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	448	44
			5358213	1600000

Practice 10-3: Creating an Oracle BI Analysis

Overview

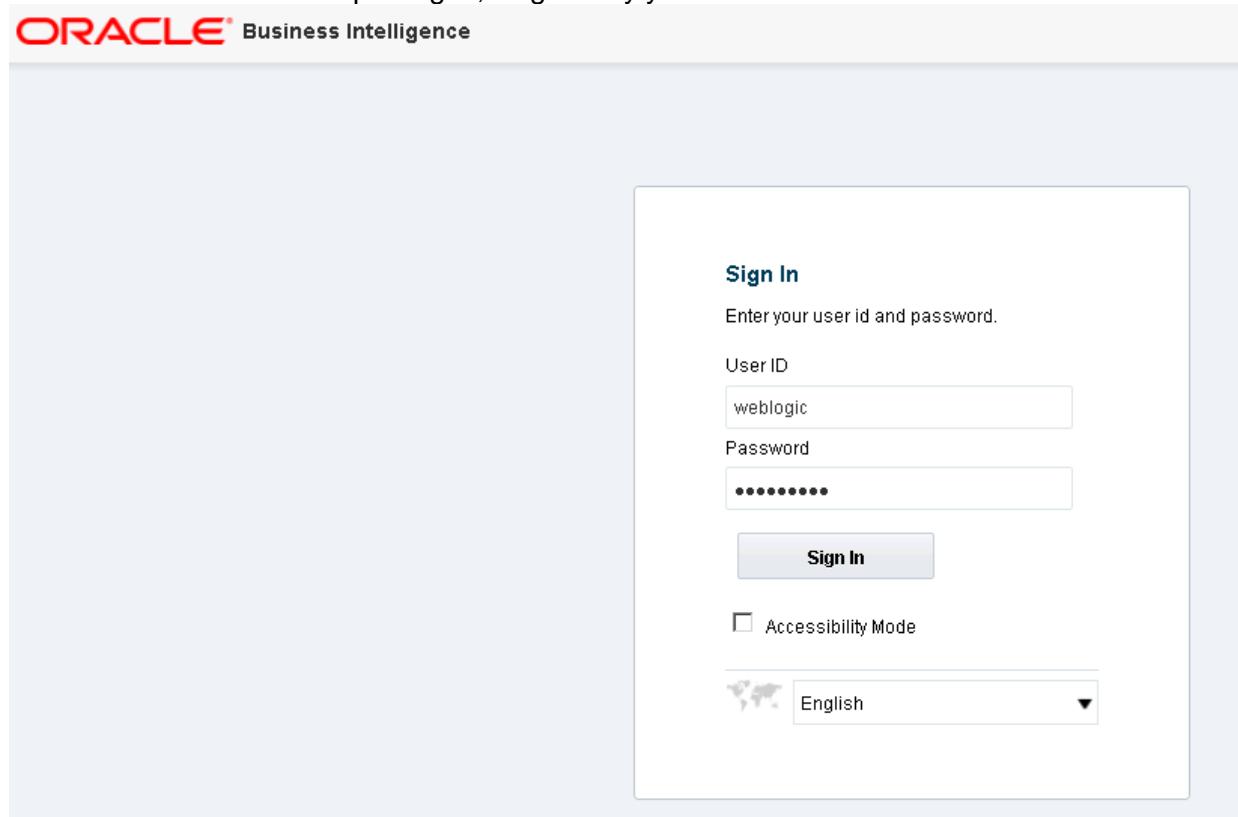
In this practice, you create a simple sales analysis by using Oracle BI Analytics, the analysis component of Oracle BI EE.

Assumptions

You have enabled integration with Oracle BI, allowing you to access the Presentation Catalog. This allows you to create an Oracle BI analysis as a data source.

Tasks

1. Open Oracle BI EE. Enter the URL for Oracle BI EE in a browser window by using the following format:
<http://<hostname>:<port>/xmlpserver/>. Example: <http://localhost:9502/analytics/>.
Your instructor can provide you with the correct URL.
2. Sign in. On the sign-in screen for Oracle BI EE, enter the username and password for a user with BI Administrator privileges, as given by your instructor.

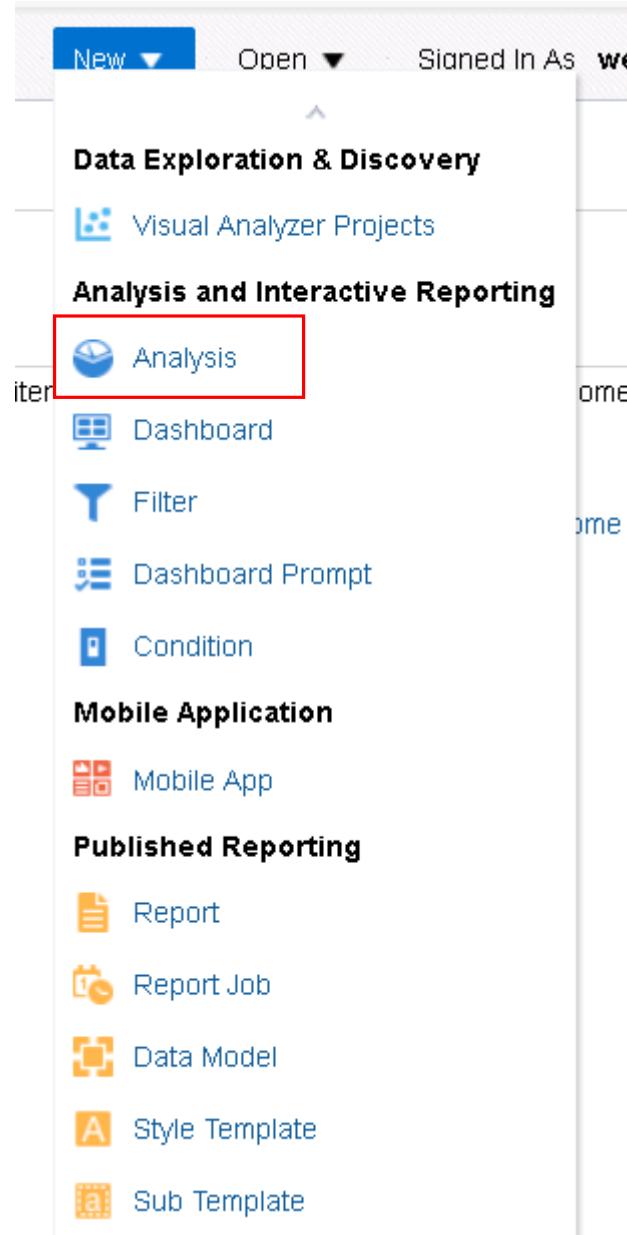


3. Click **Sign In**. When you sign in, the Home page or your personal dashboard page, My Dashboard, appears. Oracle BI EE has many of the same features that you use in BI Publisher, such as the global header or the Create section.

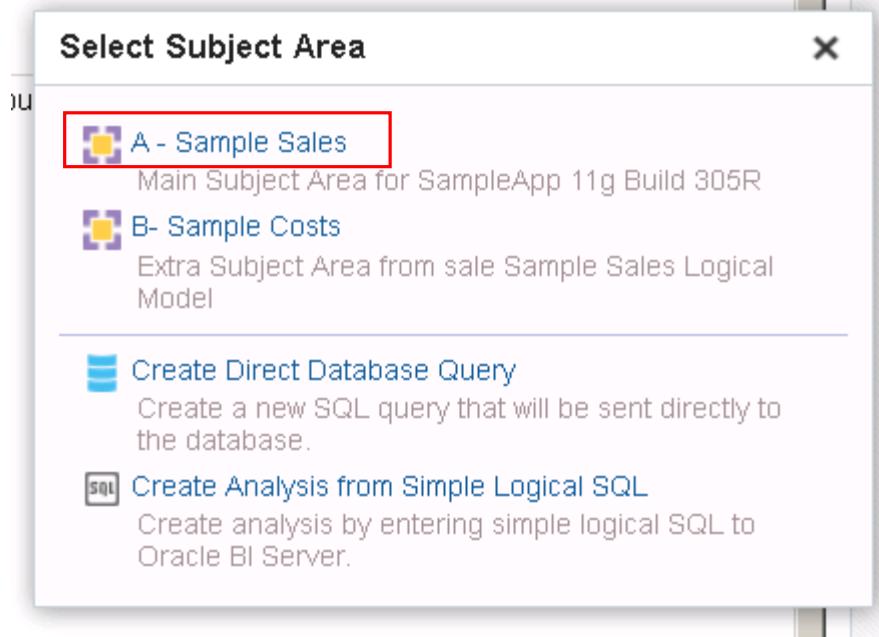
The screenshot shows the Oracle BI EE Home page. At the top, there is a navigation bar with the Oracle logo, a search bar, and links for Advanced and Address. Below the navigation bar, the word "Home" is displayed. The main content area is divided into several sections:

- Create...**: A section containing six items with icons and links:
 - 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)
- Recent**: A section with a note: "Recently opened or edited items will be displayed here." It also includes a link: "Download BI Desktop Tools ▾".
- Most Popular**: A section with a note: "No recommendations are currently available. Most Popular items will be displayed here." It also includes a link: "Download BI Desktop Tools ▾".

4. Click the **Home** link on the global header and then click **New > Analysis**.



- From the Select Subject Area dialog box, click **Sample Sales Lite**. A subject area contains folders, measure columns, attribute columns, hierarchical columns, and hierarchy levels that represent information about your organization's business.



- The Analysis Editor appears. You build your analysis by using the Criteria tab, and you review your analysis on the Results tab.

The screenshot shows the Oracle Business Intelligence Analysis Editor interface. The top navigation bar includes 'Search All', 'Advanced', 'Administration', 'Help', and 'Sign Out'. The main workspace has tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced'. The 'Criteria' tab is active. On the left, there's a tree view under 'Subject Areas' for 'A - Sample Sales', listing objects like Time, Products, Offices, Sales Person, Customers, Orders, Other Objects, and Facts. Below this is a 'Catalog' section with a 'List' dropdown set to 'All' and a 'My Folders' link. The right side of the screen contains three panes: 'Selected Columns' (empty, with a placeholder 'Drop Columns Here'), 'Filters' (empty), and a large empty area for results.

7. To build your query, you select columns from the Subject Area pane. Expand the **Offices** table.

The screenshot shows the Oracle BI Publisher Criteria interface. At the top, there are tabs for Criteria, Results, Prompts, and Advanced. Below the tabs is a toolbar with icons for search, sort, and filters. The main area is divided into several panes:

- Subject Areas**: A tree view of available tables and dimensions. The **Offices** table is expanded, and its sub-table **D4 Company** is selected and highlighted with a red box.
- Selected Columns**: A pane where selected columns are listed. It currently contains the entry "Offices".
- Filters**: A pane for defining filters, which is currently empty.

8. Double-click the **Company** column to add the column to the Selected Columns pane.
Company appears in the Selected Columns pane.

This screenshot shows the Selected Columns pane from the Oracle BI Publisher interface. It displays the columns that have been selected for the query. In this case, two columns are listed:

- Offices
- D4 Company

9. Expand the **Time** table.

10. Double-click the **Per Name Year** column. Per Name Year appears in the Selected Columns pane.

The screenshot shows the Oracle BI Publisher interface with the 'Untitled' workspace selected. In the top navigation bar, 'Criteria' is the active tab, followed by 'Results', 'Prompts', and 'Advanced'. The 'Subject Areas' pane on the left lists 'A - Sample Sales' under 'Time', which includes 'Time', 'Alternate Calendars', 'More Time Objects', 'T00 Calendar Date', 'T01 Per Name Week', 'T02 Per Name Month', 'T03 Per Name Qtr', 'T04 Per Name Half', and 'T05 Per Name Year'. The 'Selected Columns' pane on the right shows columns grouped by 'Offices' and 'Time'. Under 'Time', the 'T05 Per Name Year' column is selected and highlighted with a red box. Other visible columns include 'D4 Company' and 'T00 Calendar Date'. Below the 'Selected Columns' pane is a 'Filters' section.

11. Similarly, expand the **Products** table and add **Product** and **Product Type**.

12. Expand the **Facts -> Base-Facts** table and add **Revenue** and **Target Revenue**. The Selected Columns pane should look like this:

This screenshot shows the 'Selected Columns' pane with four distinct sections: 'Offices', 'Time', 'Products', and 'Base Facts'. The 'Products' section contains 'P1 Product' and 'P2 Product Type'. The 'Base Facts' section contains '1- Revenue' and '5- Target Revenue'. The 'Offices' and 'Time' sections remain from the previous screenshot. All columns listed here are now part of the selected columns.

Offices	Time	Products	Base Facts
D4 Company	T05 Per Name Year	P1 Product P2 Product Type	1- Revenue 5- Target Revenue

13. Click the **Results** tab. By default, a compound layout, containing a Title view and a Table view, is created for your analysis.

The screenshot shows the BI Publisher Compound Layout interface. At the top, there is a toolbar with various icons for printing, saving, and navigating. Below the toolbar, the title "Compound Layout" is displayed. The layout contains two views: "Title" and "Table". The "Title" view has a single row with a placeholder "Title". The "Table" view displays a data grid with the following columns: D4 Company, T05 Per Name Year, P1 Product, P2 Product Type, 1-Revenue, and 5-Target Revenue. The data rows show information for Genmind Corp in 2008 across various product categories and types.

D4 Company	T05 Per Name Year	P1 Product	P2 Product Type	1-Revenue	5-Target Revenue
Genmind Corp	2008	7 Megapixel Digital Camera	Camera	499,696	235,500
		Bluetooth Adaptor	Accessories	208,483	92,500
		CompCell RX3	Cell Phones	213,072	113,500
		Game Station	Fixed	360,877	171,000
		HomeCoach 2000	Fixed	200,806	96,000
		Install	Install	16,627	8,500
		KeyMax S-Phone	Smart Phones	116,698	67,000
		LCD 36X Standard	LCD	489,144	262,500

Note: If you add a hierarchy level or hierarchical column when building the analysis, the default compound layout will contain a Pivot Table view. Pivot tables are beyond the scope of this practice.

14. Click Delete (X) to remove the Title view.

The screenshot shows the BI Publisher Compound Layout interface after the "Title" view has been deleted. Only the "Table" view remains, which displays the same data grid as the previous screenshot. The "Delete" icon for the "Title" view is highlighted with a red box.

D4 Company	T05 Per Name Year	P1 Product	P2 Product Type	1-Revenue	5-Target Revenue
Genmind Corp	2008	7 Megapixel Digital Camera	Camera	499,696	235,500
		Bluetooth Adaptor	Accessories	208,483	92,500
		CompCell RX3	Cell Phones	213,072	113,500
		Game Station	Fixed	360,877	171,000
		HomeCoach 2000	Fixed	200,806	96,000
		Install	Install	16,627	8,500
		KeyMax S-Phone	Smart Phones	116,698	67,000
		LCD 36X Standard	LCD	489,144	262,500

Observe that although you have removed the Title view from the Compound Layout, it is still available in the Views pane.



15. Save the analysis. Click **Save** (). Save the analysis as Company Product Revenue by Year in the Learn folder. Click **OK**.

The name of your analysis appears on the tab.

A screenshot of the analysis results page titled 'Company Product Revenue by Year'. The 'Results' tab is selected. On the left, the 'Subject Areas' tree shows 'A - Sample Sales' expanded, with 'Time', 'Products', 'Offices', 'Sales Person', and 'Customers' listed. The main area displays a 'Compound Layout' with a 'Table' view. The table has columns: D4 Company, T05 Per Name Year, P1 Product, P2 Product Type, 1-Revenue, and 5-Target Revenue. A single row is shown: Genmind Corp, 2008, 7 Megapixel Digital Camera, Camera, 499,696, and 235,500.

D4 Company	T05 Per Name Year	P1 Product	P2 Product Type	1-Revenue	5-Target Revenue
Genmind Corp	2008	7 Megapixel Digital Camera	Camera	499,696	235,500

16. Click **Sign Out**.

Practice 10-4: Creating a Data Model and Report Based on an Oracle BI Analysis

Overview

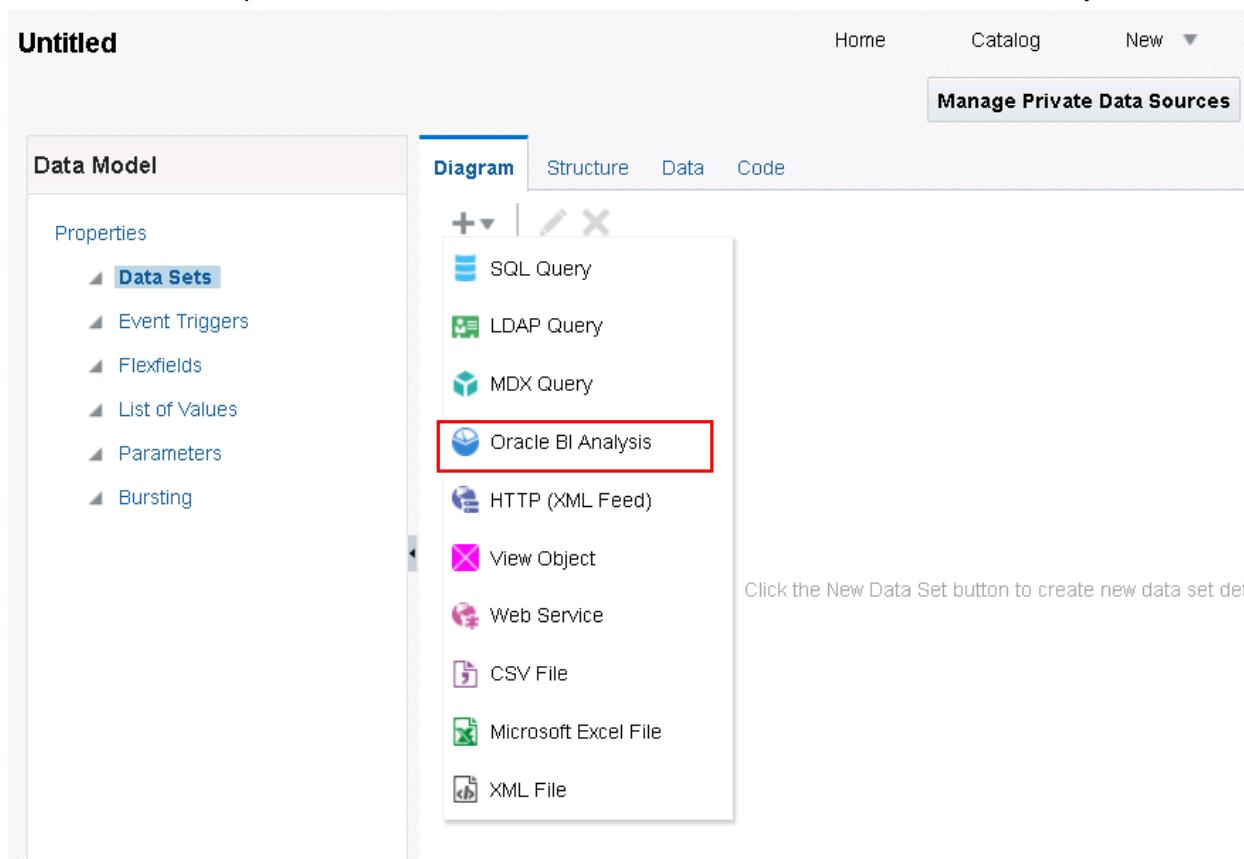
In this practice, you create a data model and report from an Oracle BI analysis data set.

Assumptions

You have successfully created the Oracle BI analysis. You will use this analysis to create a data set for this practice.

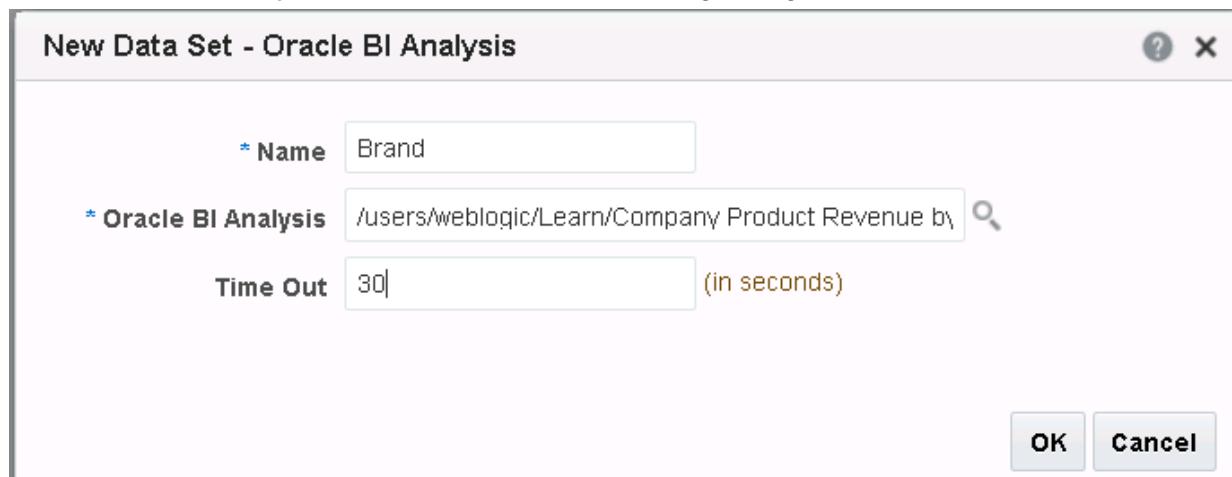
Tasks

1. Log back in to BI Publisher
2. Click **New > Data Model**.
3. In the Data Model pane, select **Data Sets** and then click Data Sets > Oracle BI Analysis.



4. In the New Data Set – Oracle BI Analysis dialog box, enter `Brand` in the Name text box.

5. Click the **Search** icon (🔍). Navigate to the \My Folders\Learn and select **Company Product Revenue by Year** from the Oracle BI Catalog dialog box.



6. Enter 30 in the Time Out text box.
7. Click **OK** in the New Data Set – Oracle BI Analysis dialog box to return to Data Model Editor.

A screenshot of the Oracle BI Data Model Editor. The left sidebar shows properties like Data Sets (Brand selected), Event Triggers, Flexfields, List of Values, Parameters, and Bursting. The main area has tabs for Diagram, Structure, Data, and Code. A 'Diagram' tab is active, showing a 'Global Level Functions' panel with a drop zone and a table named 'G_1' with six columns. The table rows have icons for edit and settings.

- After you have added the Oracle BI analysis as your data set, the data set name appears in the Data Model pane. Column names for the data set are inherited from Presentation Services and are not meaningful to the end user because they appear as a combination of column type and column name (for example, Column0). Edit the columns to display names that are more meaningful. You can use the Structure view to edit the XML tags and display names. The Structure view has two modes: Table View and Output. Table View displays element properties in a table and enables you to update XML element alias names, presentation names of the elements, sorting, null values, and reset options.

Data Source	XML View			Business View	
	XML Tag Name	Sorting	Value If Null	Display Name	Data Type
Report Data					
Data Structure	DATA_DS				
Brand	G_1				
A c37f3c1ddbe5b5377	Column0			"Offices"."D4_Comp	A
A cfcbd2d633096b003	Column1			"Time"."T05_Per_Nan	A
A ca58e3281dc17af5a	Column2			"Products"."P1_Proc	A
A c1f6026c56ac0f555	Column3			"Products"."P2_Proc	A
#E c1602b9216c75161e	Column4			"Base_Facts"."1_Re	#E
#E	Column5			"Base_Facts"."5_Tar	#E

The Output view provides a clear view of the XML structure that will be generated. The Output view is not updatable.

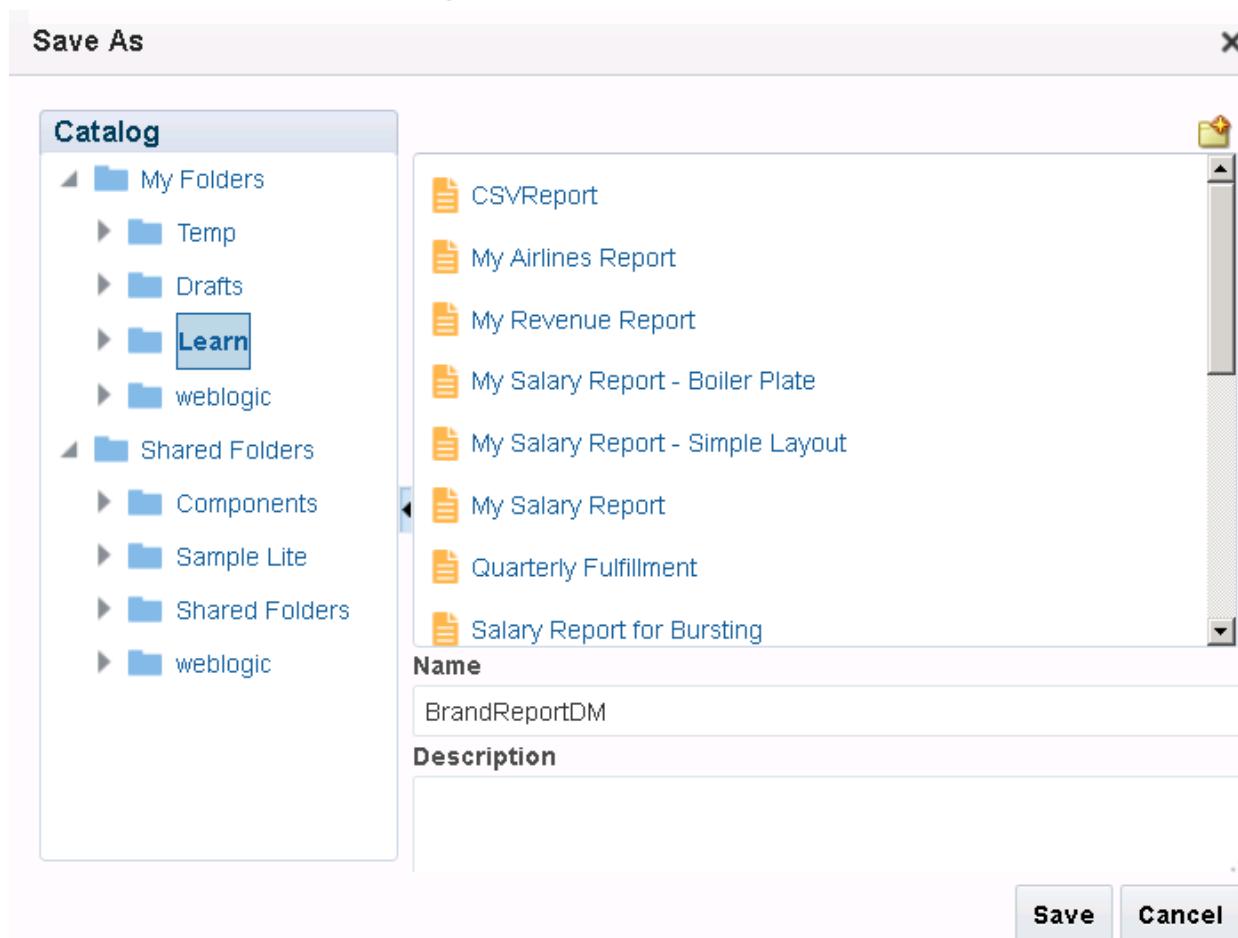
9. Click the **Data** tab. This opens the Data view for the data set. Select the required number of rows for display and click View to see the data associated with this analysis.

The screenshot shows the Oracle BI Publisher Data view interface. At the top, there are tabs: Diagram, Structure, Data (which is selected and highlighted in blue), and Code. Below the tabs, there are buttons for Rows (set to 5), View, Export, Save As Sample Data (which is highlighted with a red box), and View Engine Log. The main area displays a data set named DATA_DS. It contains two groups, G_1 and G_2, each with five columns of data:

Group	Column 1	Column 2	Column 3	Column 4	Column 5
G_1	COLUMN0 (Genmind Corp)	COLUMN1 (2008)	COLUMN2 (7 Megapixel Digital Camera)	COLUMN3 (Camera)	COLUMN4 (499696.28)
G_1	COLUMN0 (Genmind Corp)	COLUMN1 (2008)	COLUMN2 (Bluetooth Adaptor)	COLUMN3 (Accessories)	COLUMN4 (208483.42)
G_1	COLUMN0 (Genmind Corp)	COLUMN1 (2008)	COLUMN2 (Bluetooth Adaptor)	COLUMN3 (Accessories)	COLUMN4 (208483.42)
G_2	COLUMN0 (Genmind Corp)	COLUMN1 (2008)	COLUMN2 (Bluetooth Adaptor)	COLUMN3 (Accessories)	COLUMN4 (208483.42)

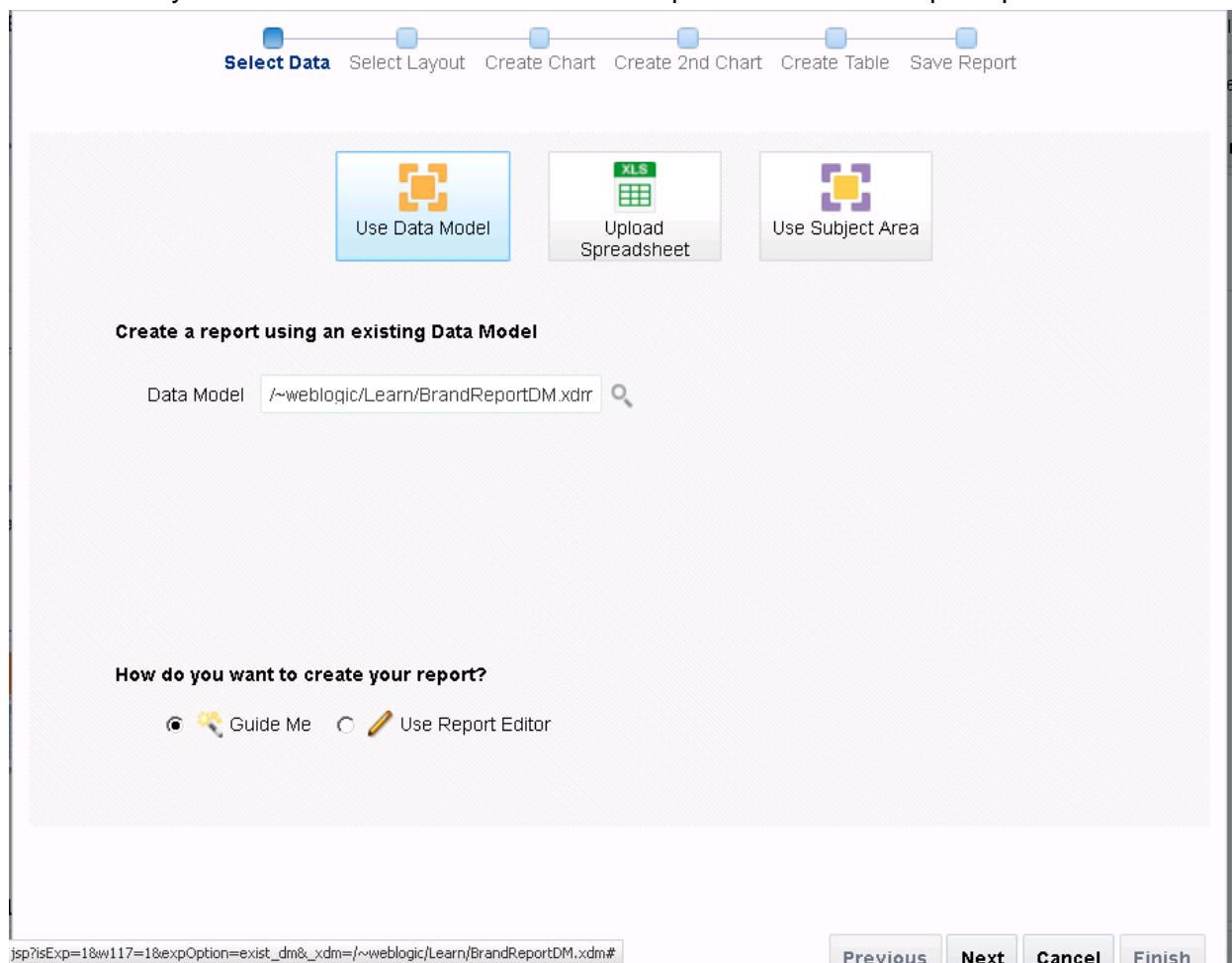
10. After the data is displayed, click Save As Sample Data. You will receive a confirmation. Close the confirmation message.

11. Save the data model as **BrandReportDM** in the **Learn** folder.



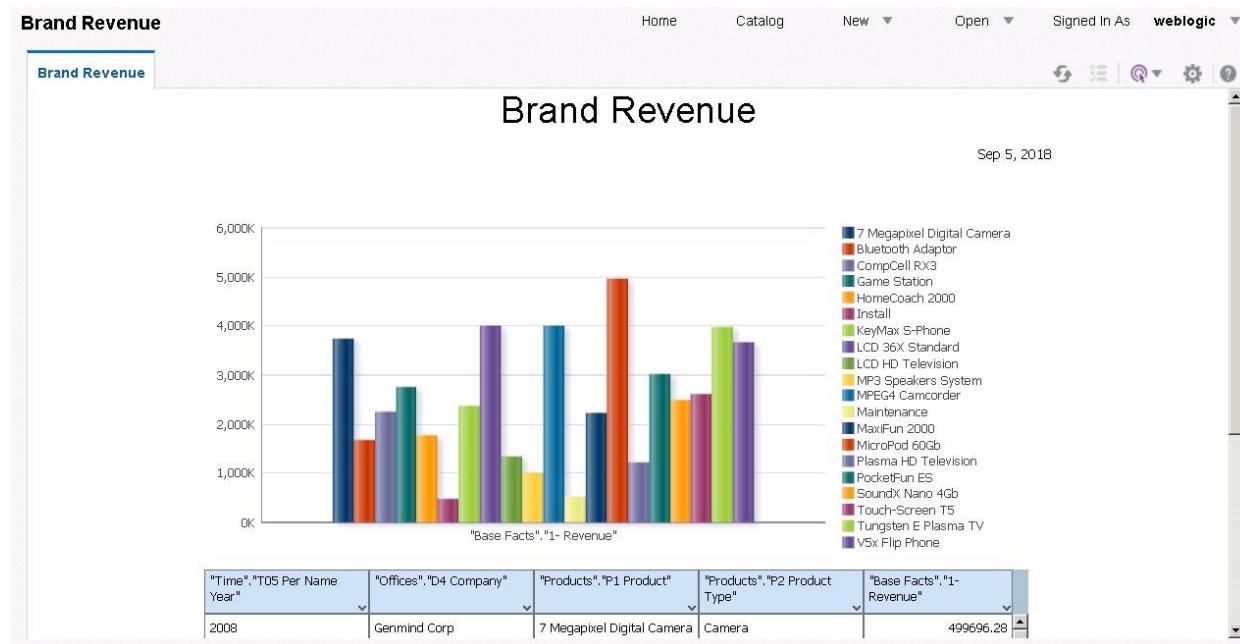
12. Click Create Report. This opens the Create Report Wizard.

13. Observe that the Create Report Wizard is selected with the data model that you created with the analytic data source. Select the Guide Me option to create a simple report.



14. Complete the wizard steps to create the report.
15. Save the report as **Brand Revenue** in the **Learn** folder.

16. Because you chose the View option while saving the report, it will be opened in Report Viewer.



Practice 10-5: Adding a BI Publisher Report to an Oracle BI EE Dashboard

Overview

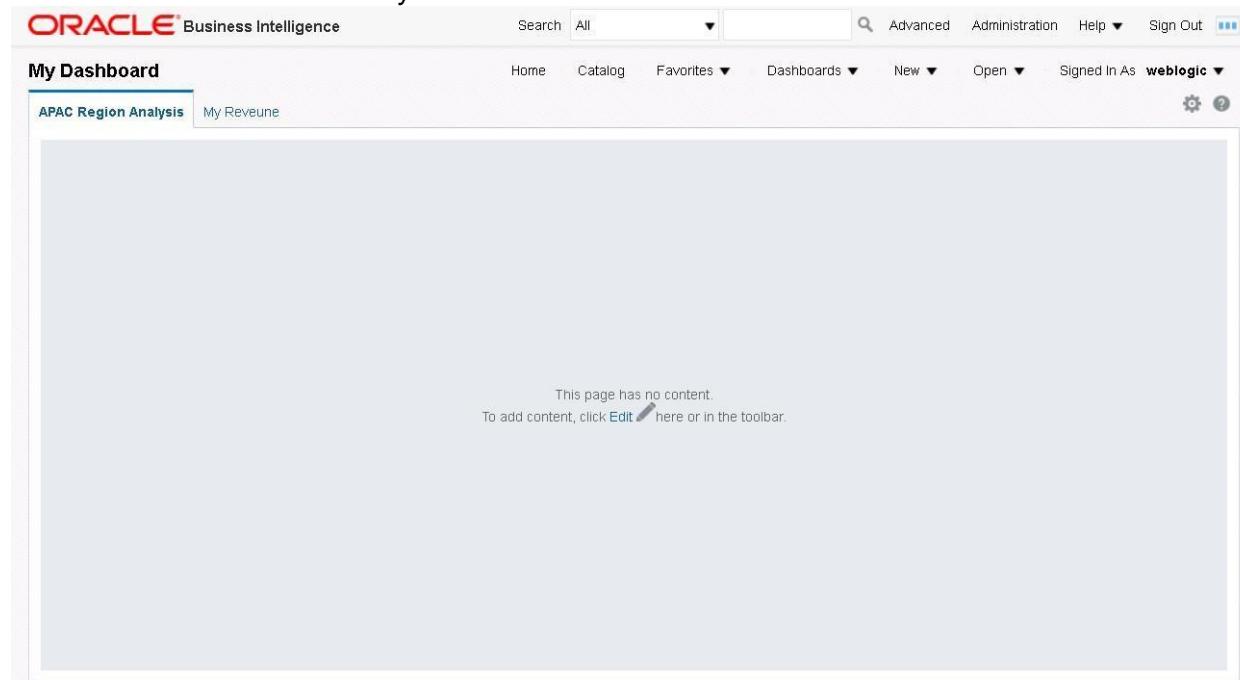
In this practice, you add a BI Publisher report created from an Oracle BI analysis and BI Server data set to an Oracle BI EE dashboard.

Assumptions

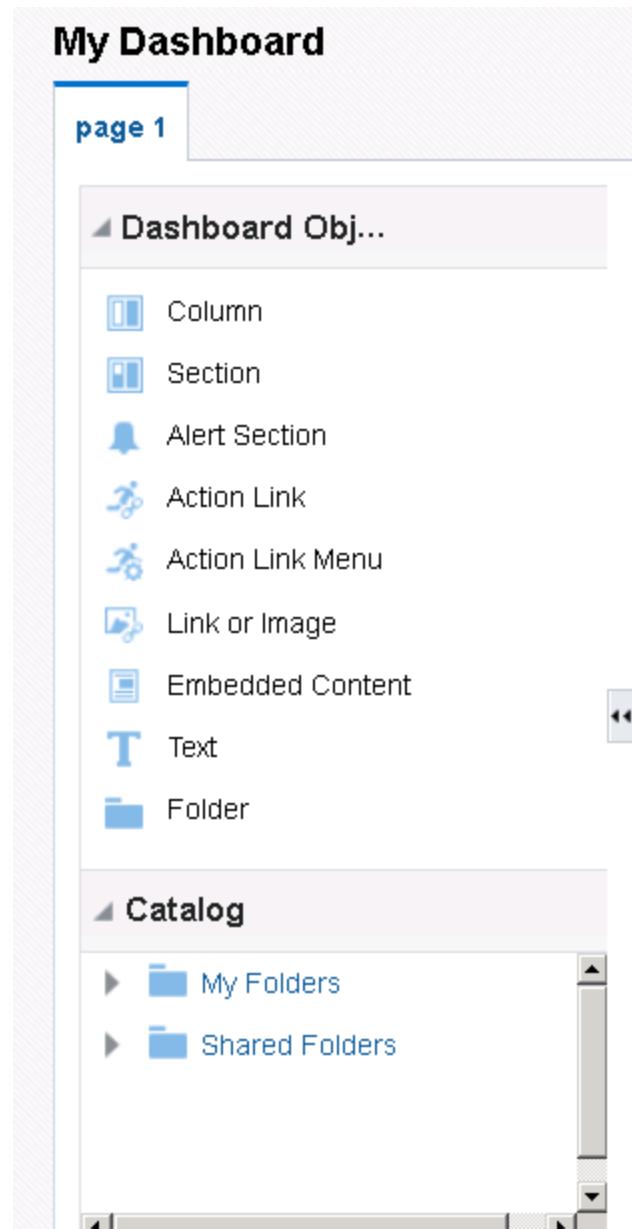
You have successfully created the BI Publisher report in the previous reports. You will add these reports to the Oracle BIEE dashboard.

Tasks

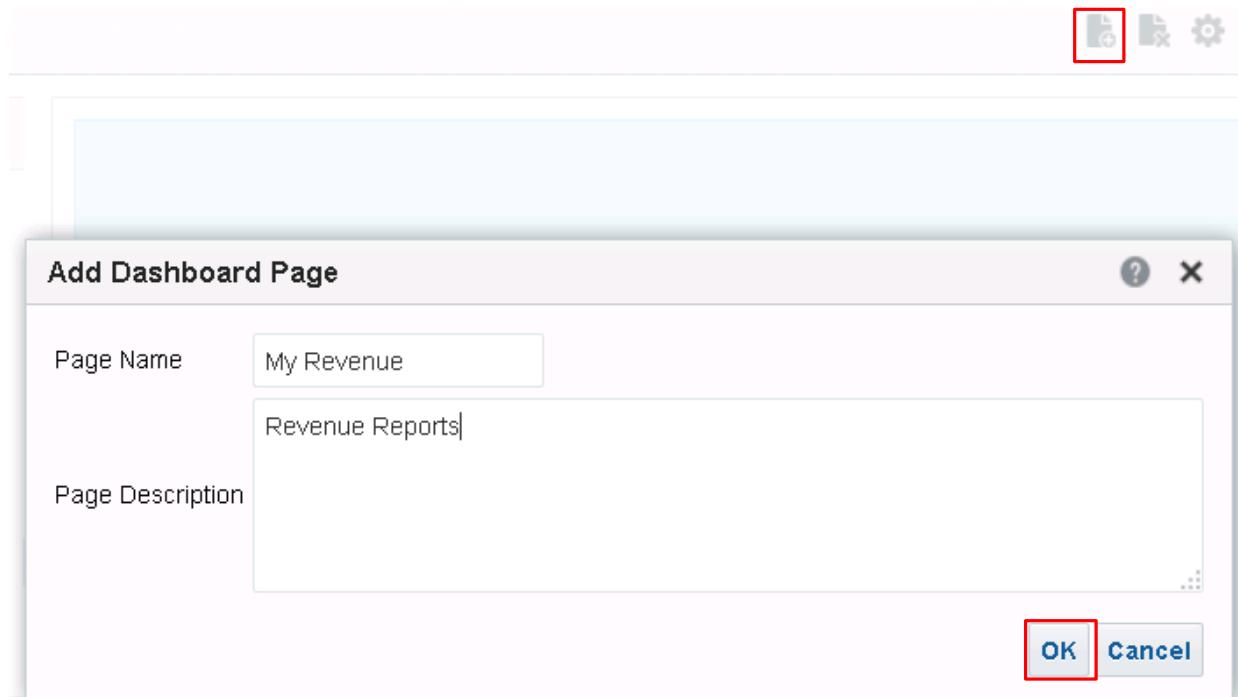
1. Open a new browser window. Log in to Oracle BI EE. (Enter <http://localhost:7001/analytics> in the address bar.)
2. Enter your credentials in the User ID and Password text boxes in the Oracle BI EE Sign In window and click **Sign In**.
3. Click Dashboard and select My Dashboard.



4. Click **Page Options** () > **Edit Dashboard** or click **Edit** () to edit the dashboard. The Dashboard Editor appears. The Dashboard Editor is composed of three areas: the Dashboard Objects pane, Catalog pane, and the work area (Drop Content Here).



5. When you open a new dashboard, a new page, named page 1, is available by default. You can either rename this page or add a new page. In this example, you add a new page. Click the Add a New Page icon to add a new dashboard page My Revenue.



Enter the name My Revenue for the new dashboard page and click **OK**.

6. Drag and add column element and sections to the new My Revenue page.

The screenshot shows the 'My Dashboard' interface. On the left, there's a sidebar with a tree view labeled 'Dashboard Obj...' containing items like 'Column' and 'Section', both of which are highlighted with red boxes. To the right, there's a main workspace with a single column labeled 'Column 1' and a section labeled 'Section 1'. The top navigation bar includes links for Home, Catalog, Favorites, Dashboards, New, Open, and Signed In As 'weblogic'.

7. In the Catalog pane, navigate to My Folders > Learn and select the report Brand Revenue, which you created in the previous practice.

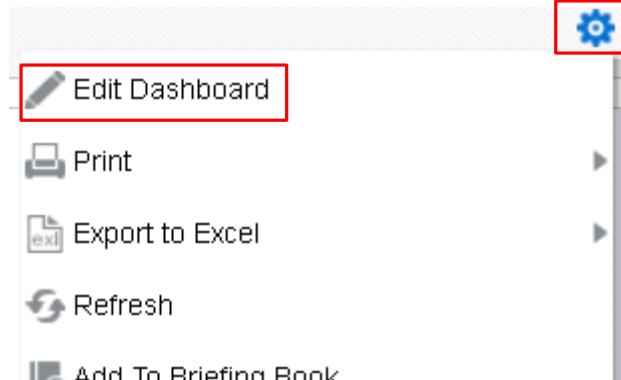
The screenshot shows the Oracle BI Publisher interface. On the left, the Catalog pane is open, displaying a tree structure. Under 'My Folders' > 'Learn', the 'Brand Revenue' report is selected and highlighted with a red box. On the right, the Dashboard Editor canvas displays a single section labeled 'Section 1' containing a placeholder icon for 'Brand Revenue'. At the top right of the interface, there are several buttons, with the 'Run' button being highlighted with a red box.

8. Drag it to the Dashboard Editor canvas on the right. You can also add any other relevant reports. The reports appear on the My Revenue page.
 9. Click Save.
 10. Click Run.

The report is displayed in the dashboard.



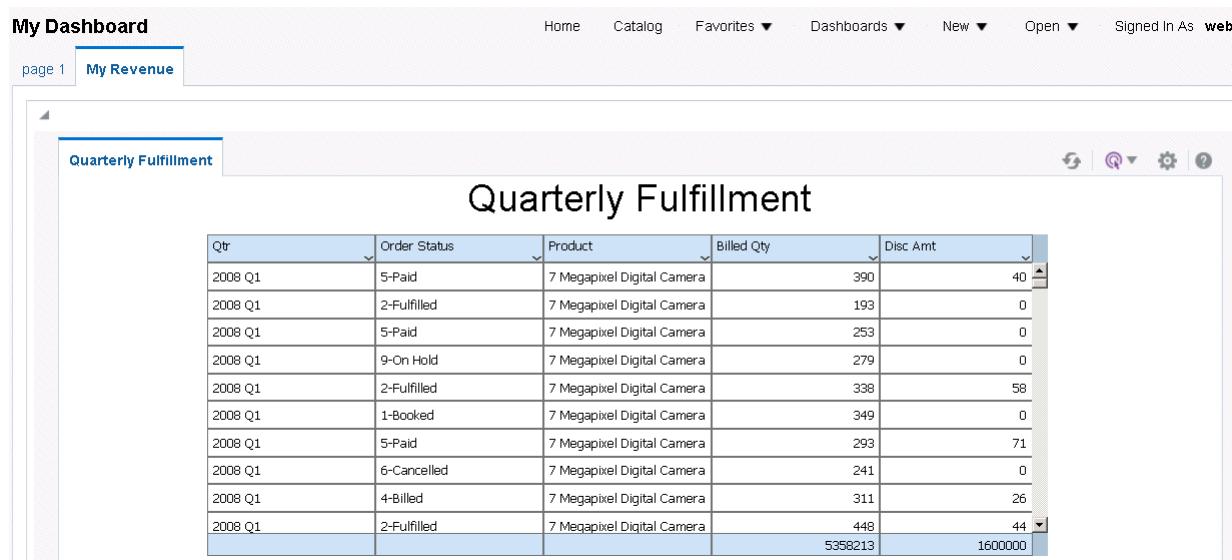
11. Click **Page Options** () > **Edit Dashboard** or click **Edit** () to edit the dashboard.



12. Select **Quarterly Fulfillment**, the report you created earlier, and drag it to the dashboard.

13. Click **Save** and click **Run** to open My Dashboard to view your report.

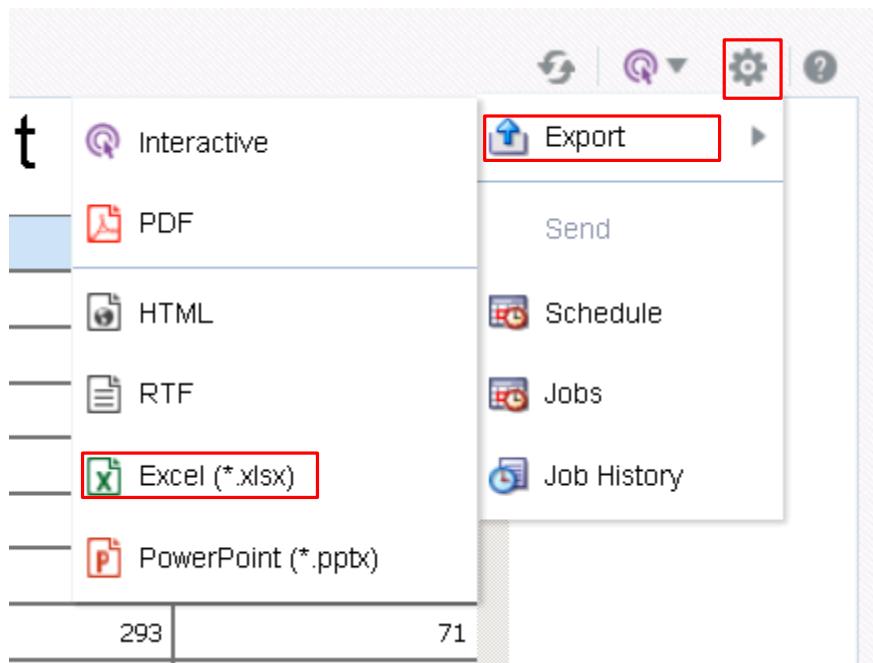
The reports are displayed in the dashboard.



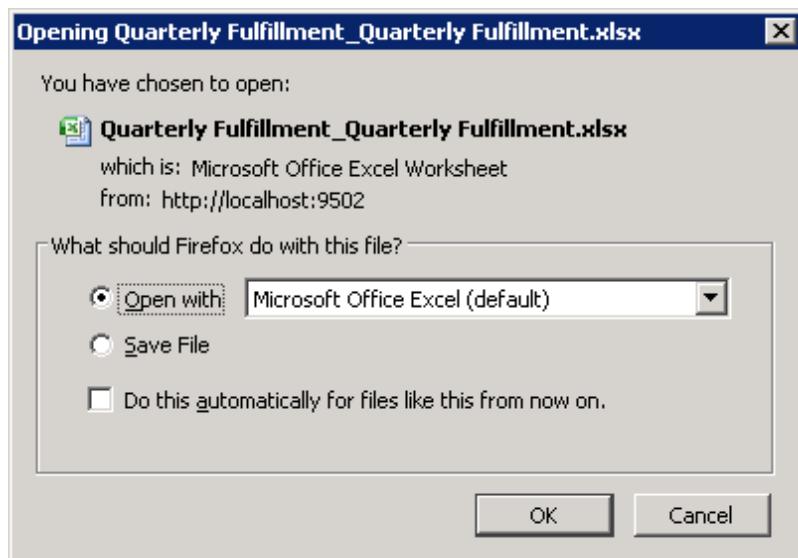
The screenshot shows the Oracle BI Enterprise Edition interface. At the top, there's a navigation bar with links for Home, Catalog, Favorites, Dashboards, New, Open, and Signed In As (web). Below the navigation bar, there are two tabs: 'page 1' and 'My Revenue'. A search bar and a toolbar with various icons are also present. The main content area displays a report titled 'Quarterly Fulfillment'. The report has a header with columns: Qtr, Order Status, Product, Billed Qty, and Disc Amt. The data table below contains 10 rows of fulfillment details for 7 Megapixel Digital Cameras across different quarters and order statuses.

Qtr	Order Status	Product	Billed Qty	Disc Amt
2008 Q1	5-Paid	7 Megapixel Digital Camera	390	40
2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	193	0
2008 Q1	5-Paid	7 Megapixel Digital Camera	253	0
2008 Q1	9-On Hold	7 Megapixel Digital Camera	279	0
2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	338	58
2008 Q1	1-Booked	7 Megapixel Digital Camera	349	0
2008 Q1	5-Paid	7 Megapixel Digital Camera	293	71
2008 Q1	6-Cancelled	7 Megapixel Digital Camera	241	0
2008 Q1	4-Billed	7 Megapixel Digital Camera	311	26
2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	448	44
			5358213	1600000

14. When the report is displayed in the dashboard, use the Action menu to export the report data to an MS Excel file. Select Export>Excel (*.xlsx).



15. Open or save the file in your local folder to open it.



The report data is exported to Excel format. Select the downloaded file to open it in MS Excel.

A screenshot of Microsoft Excel showing a table titled "Quarterly Fulfillment". The table has 5 columns: Qtr, Order Status, Product, Billed Qty, and Disc Amt. The data consists of 22 rows, each representing a fulfillment record for a 7 Megapixel Digital Camera. The rows are numbered 2 through 22. The "Order Status" column contains various values such as 5-Paid, 2-Fulfilled, 9-On Hold, etc. The "Product" column is consistently "7 Megapixel Digital Camera". The "Billed Qty" column shows quantities ranging from 113 to 390. The "Disc Amt" column shows amounts ranging from 0 to 71.

	A	B	C	D	E	F	G	H	I
1	Quarterly Fulfillment								
2	Qtr	Order Status	Product	Billed Qty	Disc Amt				
3	2008 Q1	5-Paid	7 Megapixel Digital Camera	390	40				
4	2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	193	0				
5	2008 Q1	5-Paid	7 Megapixel Digital Camera	253	0				
6	2008 Q1	9-On Hold	7 Megapixel Digital Camera	279	0				
7	2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	338	58				
8	2008 Q1	1-Booked	7 Megapixel Digital Camera	349	0				
9	2008 Q1	5-Paid	7 Megapixel Digital Camera	293	71				
10	2008 Q1	6-Cancelled	7 Megapixel Digital Camera	241	0				
11	2008 Q1	4-Billed	7 Megapixel Digital Camera	311	26				
12	2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	448	44				
13	2008 Q1	5-Paid	7 Megapixel Digital Camera	206	41				
14	2008 Q1	5-Paid	7 Megapixel Digital Camera	294	18				
15	2008 Q1	5-Paid	7 Megapixel Digital Camera	302	0				
16	2008 Q1	3-Shipped	7 Megapixel Digital Camera	346	56				
17	2008 Q1	5-Paid	7 Megapixel Digital Camera	245	27				
18	2008 Q1	5-Paid	7 Megapixel Digital Camera	326	2				
19	2008 Q1	9-On Hold	7 Megapixel Digital Camera	113	38				
20	2008 Q1	9-On Hold	7 Megapixel Digital Camera	373	18				
21	2008 Q1	1-Booked	7 Megapixel Digital Camera	227	0				
22	2008 Q1	2-Fulfilled	7 Megapixel Digital Camera	237	0				
	2008 Q1	5-Paid	7 Megapixel Digital Camera	245	0				

Practices for Lesson 11:
Creating Data Models and BI
Publisher Reports Based on
Other Data Sources

Practices for Lesson 11: Overview

Goal

To create BI Publisher reports based on an XML file and a CSV file

Practices Overview

You create two BI Publisher reports. The first report is based on an XML file and the second is based on a CSV file.

Time

15–25 minutes

Practice 11-1: Creating a BI Publisher Report Based on an XML File

Overview

You can use an XML data file stored in a directory that has been set up by your administrator as a data source; however, no metadata is available from file data sets. When you set up data sources, you define a file directory as a data set. You place XML documents in the file directory to access directly as data sources for your reports.

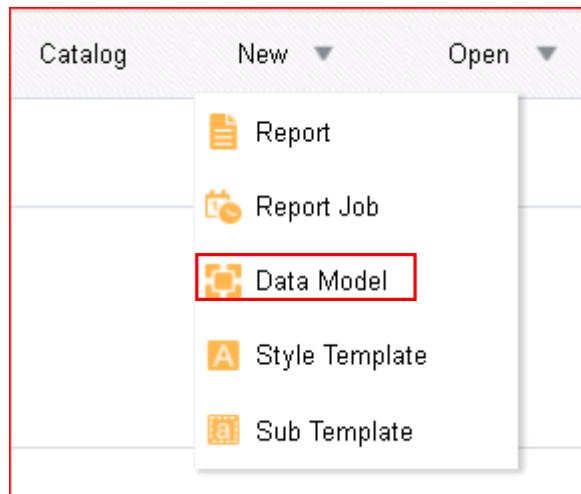
Assumptions

To perform the tasks in this practice, you must have access to the demo files provided with BI Publisher. This demo file is generally found in the

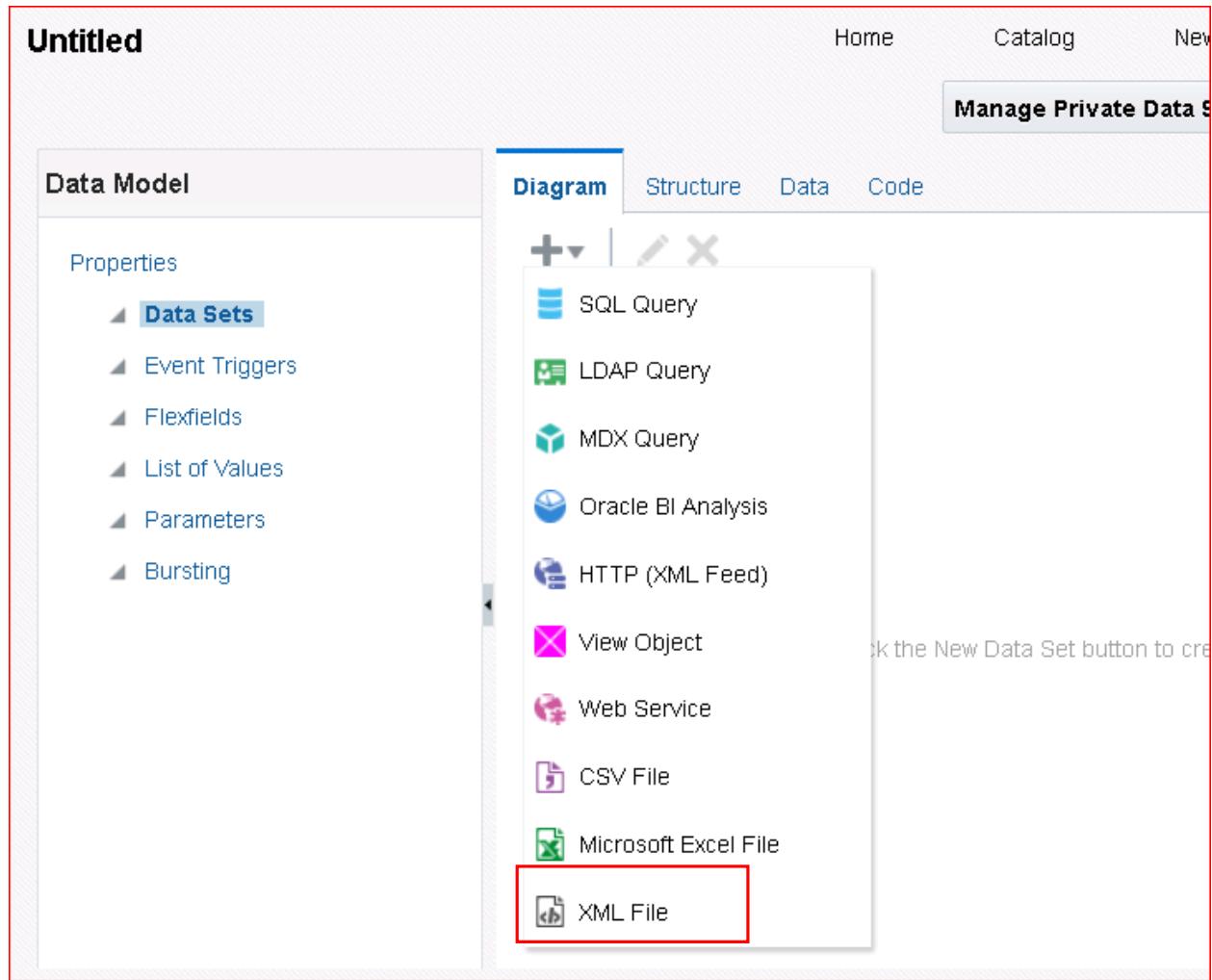
`<drive>:\<FusionMdeWare_home>\user_projects\domains\bifoundation_domain\config\bipublisher\repository\DemoFiles` directory.

Tasks

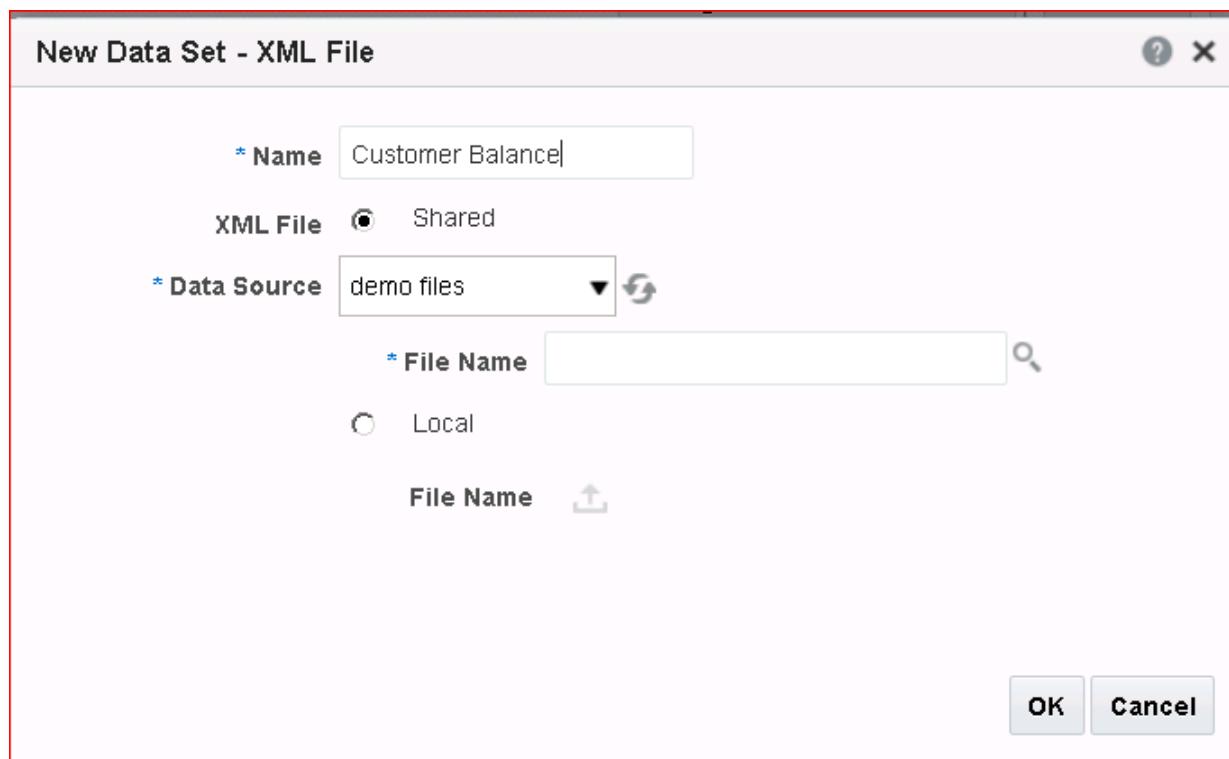
1. Log in to BI Publisher.
2. Click New > Data Model.



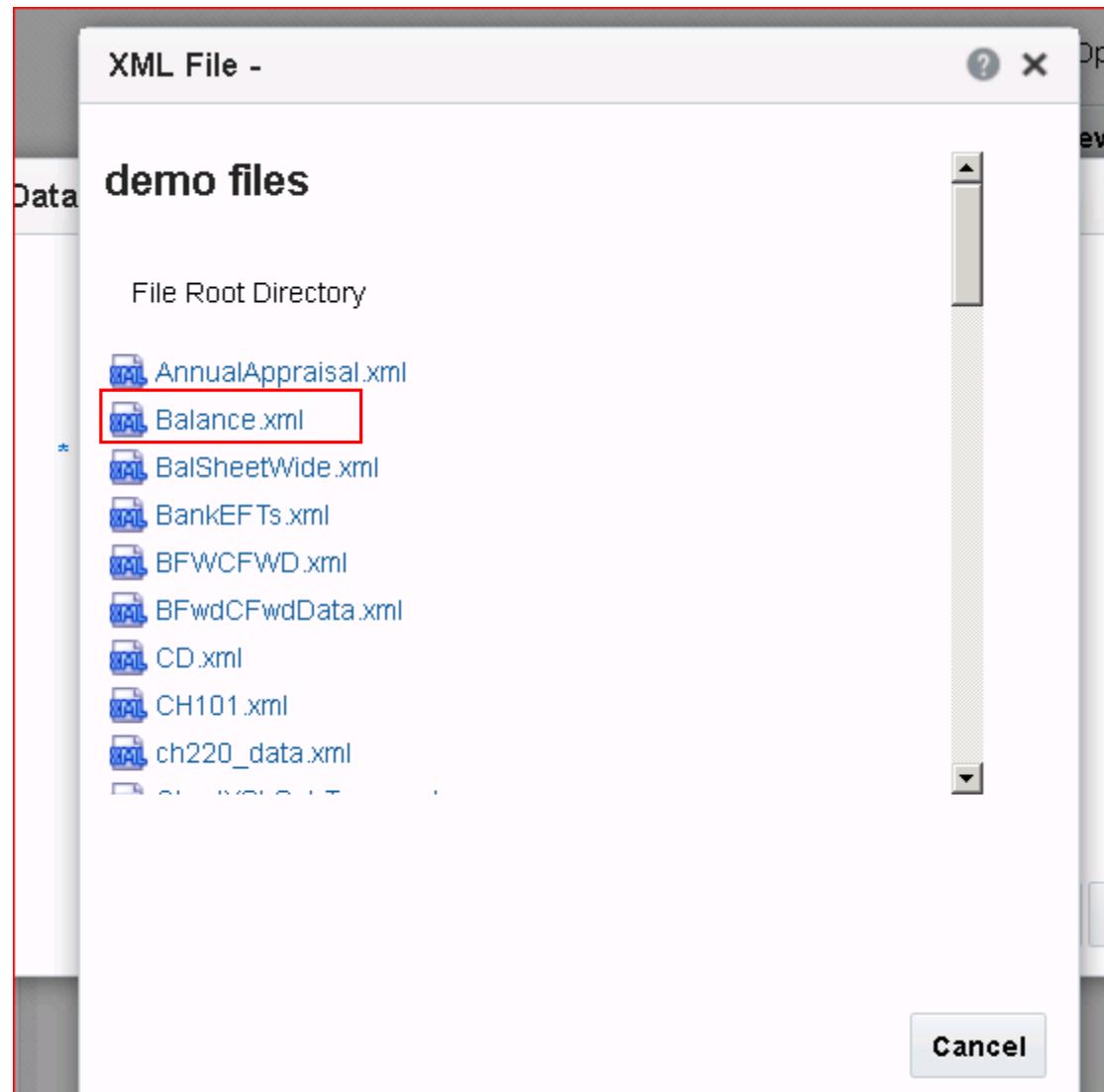
3. In the Data Model pane, select **Data Sets**, and then click Data Sets > XML File.



4. In the New Data Set – File dialog box, enter **Customer Balance** in the Name text box.



5. Click the **Search** icon (🔍) and select **Balance.xml** in the webpage dialog box.



6. Click **OK**.

7. The new data set appears in the Data Model pane. Click **Data** to view the output data.

The screenshot shows the Oracle BI Publisher interface with the title bar "Untitled". The top navigation bar includes "Home", "Catalog", "New", "Open", "Signed In As", and "weblogic". Below the navigation is a toolbar with "Manage Private Data Sources", "View Data", "Create Report", and other icons. The main area is titled "Data Model" and has tabs "Diagram", "Structure", "Data" (which is selected and highlighted with a red box), and "Code". On the left, a sidebar titled "Properties" lists "Data Sets", "Event Triggers", "Flexfields", "List of Values", and "Parameters". Under "Data Sets", "Customer Balance" is selected and highlighted with a red box. In the main workspace, there is a yellow box containing a small icon and the text "G_1". Below it, a message says "No metadata available for elements".

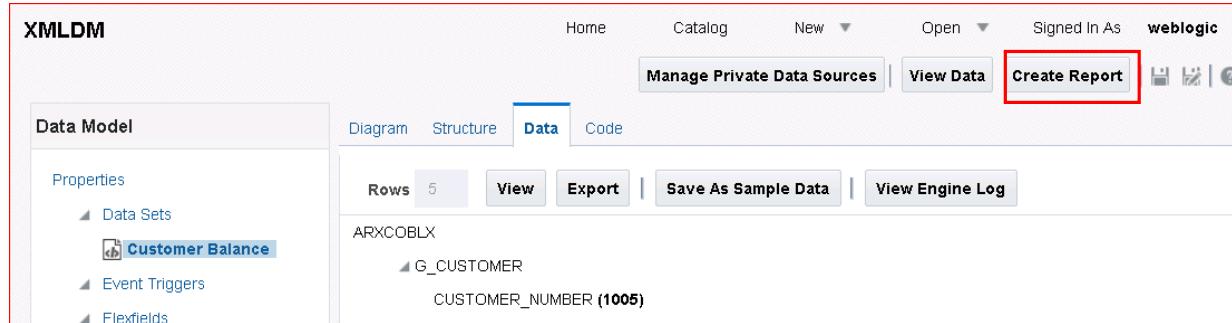
8. Click View to see the data.

The screenshot shows the Oracle BI Publisher Data Model Editor interface. The title bar says "Untitled". The top menu has items like Home, Catalog, New, Open, Signed In As, and weblogic. Below the menu is a toolbar with buttons for Manage Private Data Sources, View Data, Create Report, and a refresh icon. The main area has tabs for Diagram, Structure, Data (which is selected), and Code. Under Data, there are buttons for Rows (5), View (highlighted with a red box), Export, Save As Sample Data (highlighted with a red box), and View Engine Log. On the left, there's a "Data Model" sidebar with sections for Properties, Data Sets, Event Triggers, Flexfields, List of Values, Parameters, and Bursting. A "Customer Balance" dataset is selected. The main pane displays a hierarchical structure under ARXCOBLX, specifically G_CUSTOMER, with fields like CUSTOMER_NUMBER (1005), CUSTOMER_NAME (Vision Operations), ADDRESS_LINE1 (5645 Main Street), and so on.

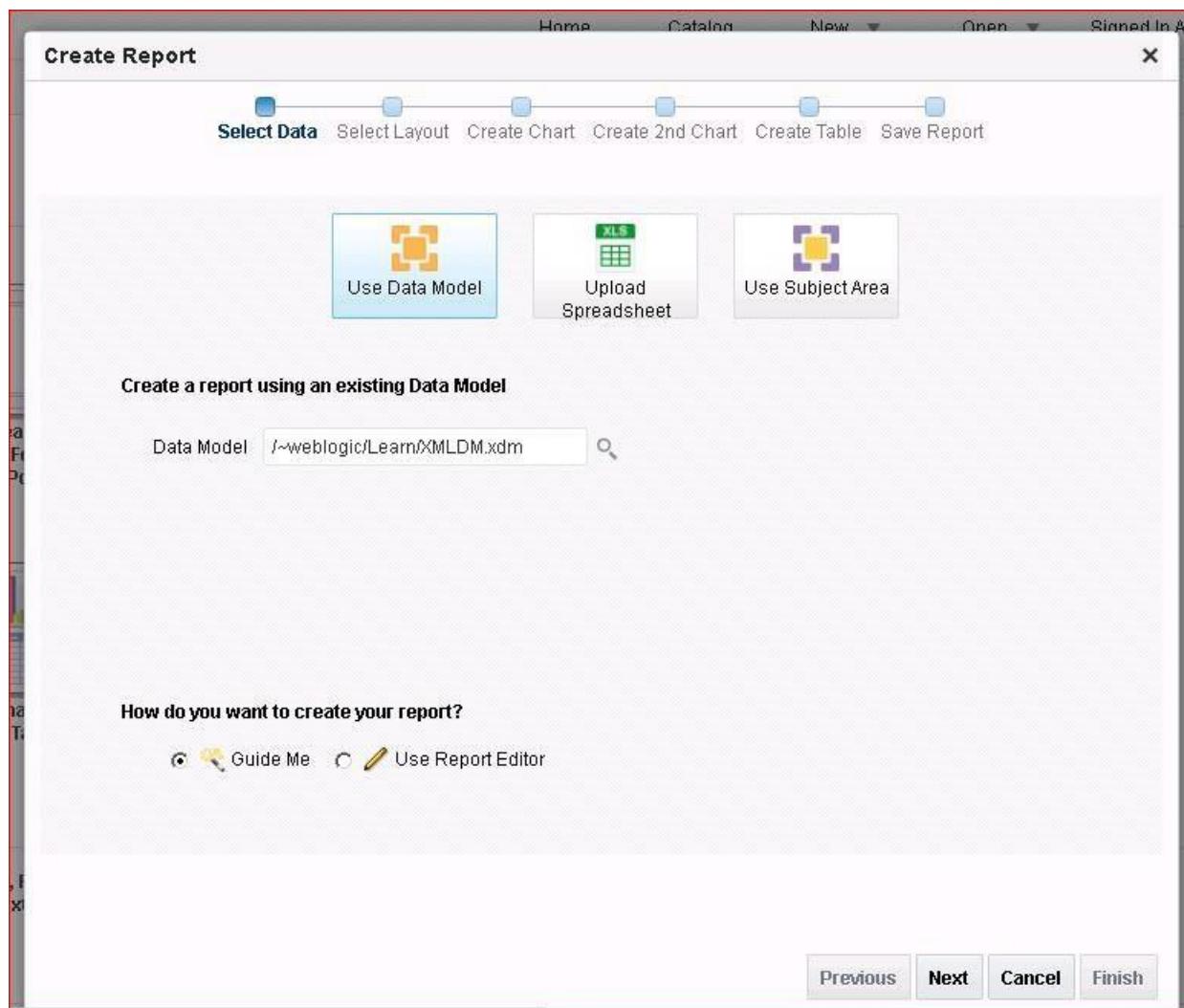
Save the sample data and then save the data model **XMLDM** in the **Learn** folder.

The screenshot shows the "Save As" dialog box. On the left is a "Catalog" sidebar with sections for My Folders (Temp, Drafts, Learn, weblogic) and Shared Folders (Components, Sample Lite, Shared Folders, weblogic). The "Learn" folder is selected. The main pane lists several reports: My Airlines Report, My Revenue Report, My Salary Report - Boiler Plate, My Salary Report - Simple Layout, My Salary Report, Salary Report, and My Airlines Report. Below this is a "Name" field containing "XMLDM" and a "Description" field. At the bottom are "Save" and "Cancel" buttons, with "Save" highlighted with a red box.

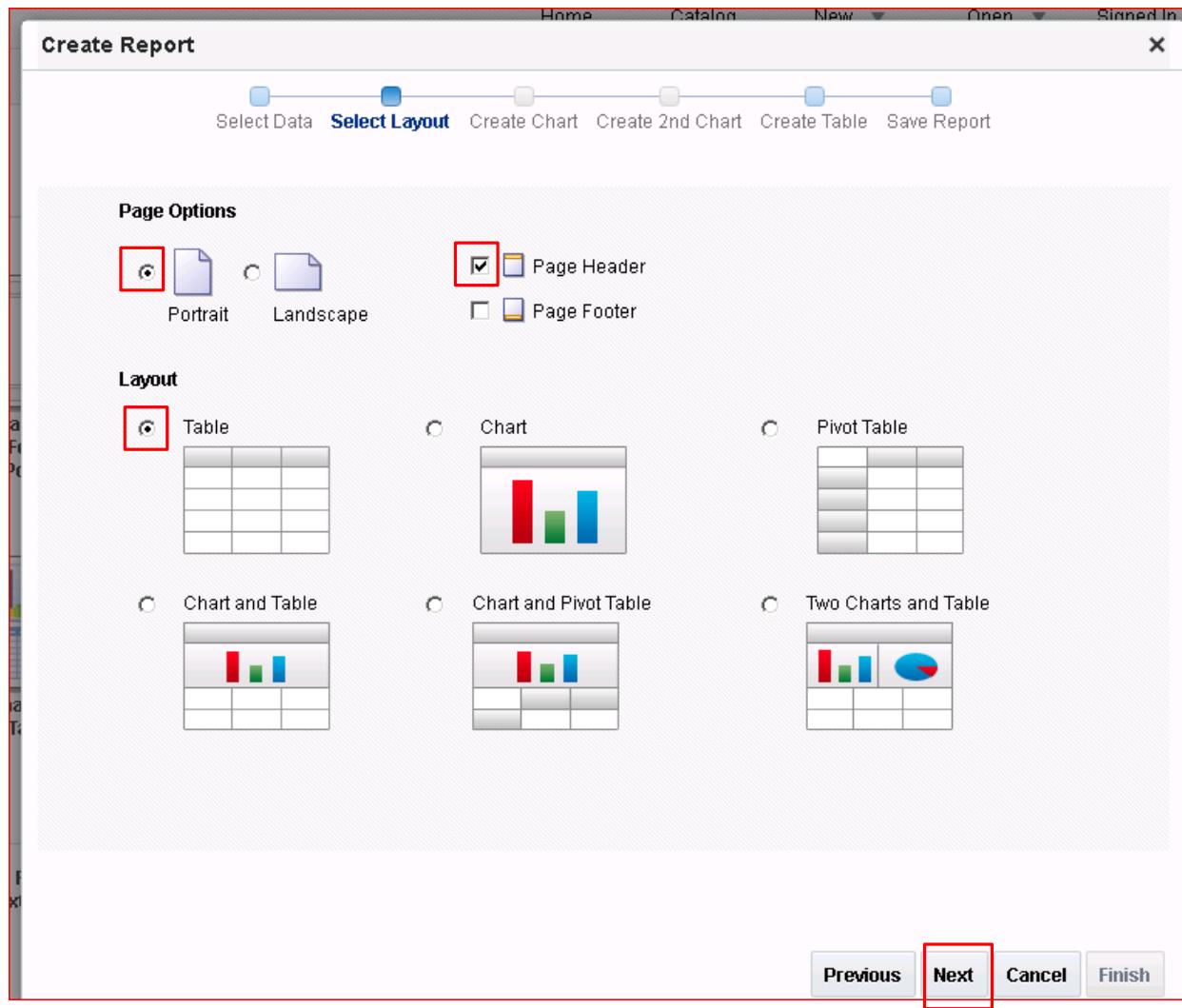
9. Click Create Report.



10. The Create Report Wizard is opened. Observe that the data model that you just created is selected.



11. Click Next to select the layout as shown below. Select a simple layout with a table.



12. Click Next.
13. Drag the fields from the data source to create a table as shown below.
14. Select the fields as given below.

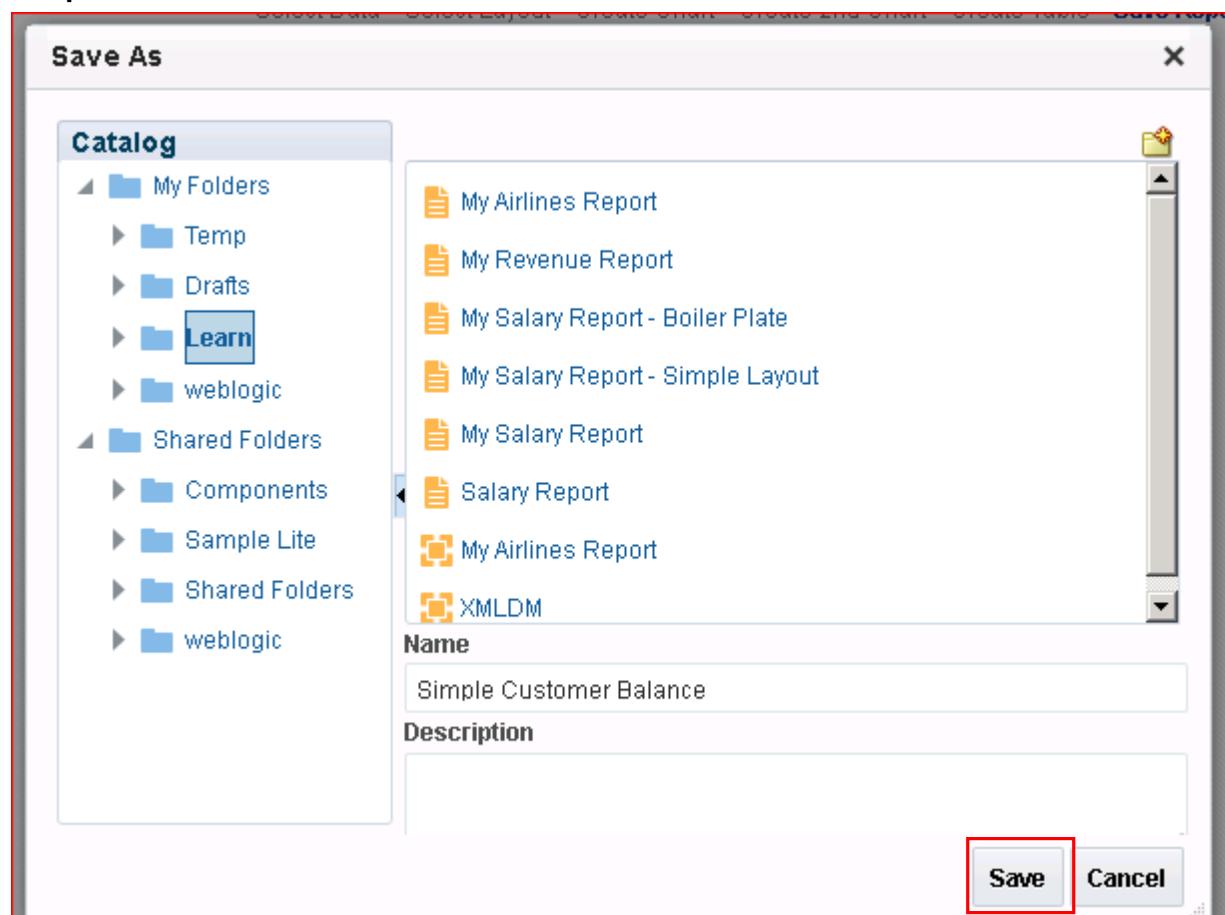
No	Fields
a.	Customer Number
b.	Trx Number
c.	Transaction Date
d.	Trans Amount
e.	Trans Amount Remaining

15. The table will look like this.

The screenshot shows the 'Create Report' dialog box with a red border. At the top, there is a progress bar with six steps: 'Select Data', 'Select Layout', 'Create Chart', 'Create 2nd Chart', 'Create Table' (which is highlighted in blue), and 'Save Report'. Below the progress bar, a message says 'Drag fields from the Data Source to create the table. Sample data is displayed.' On the left, a 'Data Source' tree view shows categories like 'G Currency', 'A Trx Currency Code', and 'G Invoices' expanded, with various fields listed under each. On the right, a table grid displays sample data with columns: Customer Number, Trx Number, Transaction Date, Trans Amount, and Trans Amou. At the bottom of the dialog, there is a checkbox labeled 'Show Grand Totals Row' with a red box drawn around it, and a 'Preview Report' button. At the very bottom, there are buttons for 'Previous', 'Next' (which is highlighted in red), 'Cancel', and 'Finish'.

Deselect the Show Grand Totals Row check box.

16. Click **Next**. Select the **View Report** option while saving the report. Save the report as **Simple Customer Balance** in the **Learn** folder.



17. The report is opened in Report Viewer:

The screenshot shows the 'Simple Customer Balance' report in the Report Viewer. The title is 'Simple Customer Balance' and the date is 'Aug 17, 2018'. The data is presented in a table with the following columns: Customer Number, Trx Number, Transaction Date, Trans Amount, and Trans Amount Remaining. There are 10 rows of data, each corresponding to a transaction for customer number 1005. The last row shows a total of 53.35 for the trans amount remaining.

Customer Number	Trx Number	Transaction Date	Trans Amount	Trans Amount Remaining
1005	502444	2003-12-06	19125	19125
1005	502445	2003-12-06	12375	12375
1005	1.0019903E7	2003-11-18	132733.84	132733.84
1005	1.0020178E7	2003-11-20	71577.42	71577.42
1005	1.0020219E7	2003-11-21	89344.81	89344.81
1005	502394	2003-11-22	11250	11250
1005	1.002028E7	2003-11-24	128654.96	128654.96
1005	1.002031E7	2003-11-25	120653.2	120653.2
1005	1.0020319E7	2003-11-26	147328.21	147328.21
	234	2003-12-02	53.35	53.35

Practice 11-2: Creating a BI Publisher Report Based on a CSV file

Overview

You can use a flat or CSV file stored in a directory that has been set up by your administrator as a data source. (This demo directory is similar to the practice you completed previously.)

The supported CSV file delimiters are Comma, Pipe, Semicolon, and Tab.

The CSV files that you use as input to the BI Publisher data engine must be UTF-8 encoded and cannot contain empty column headers.

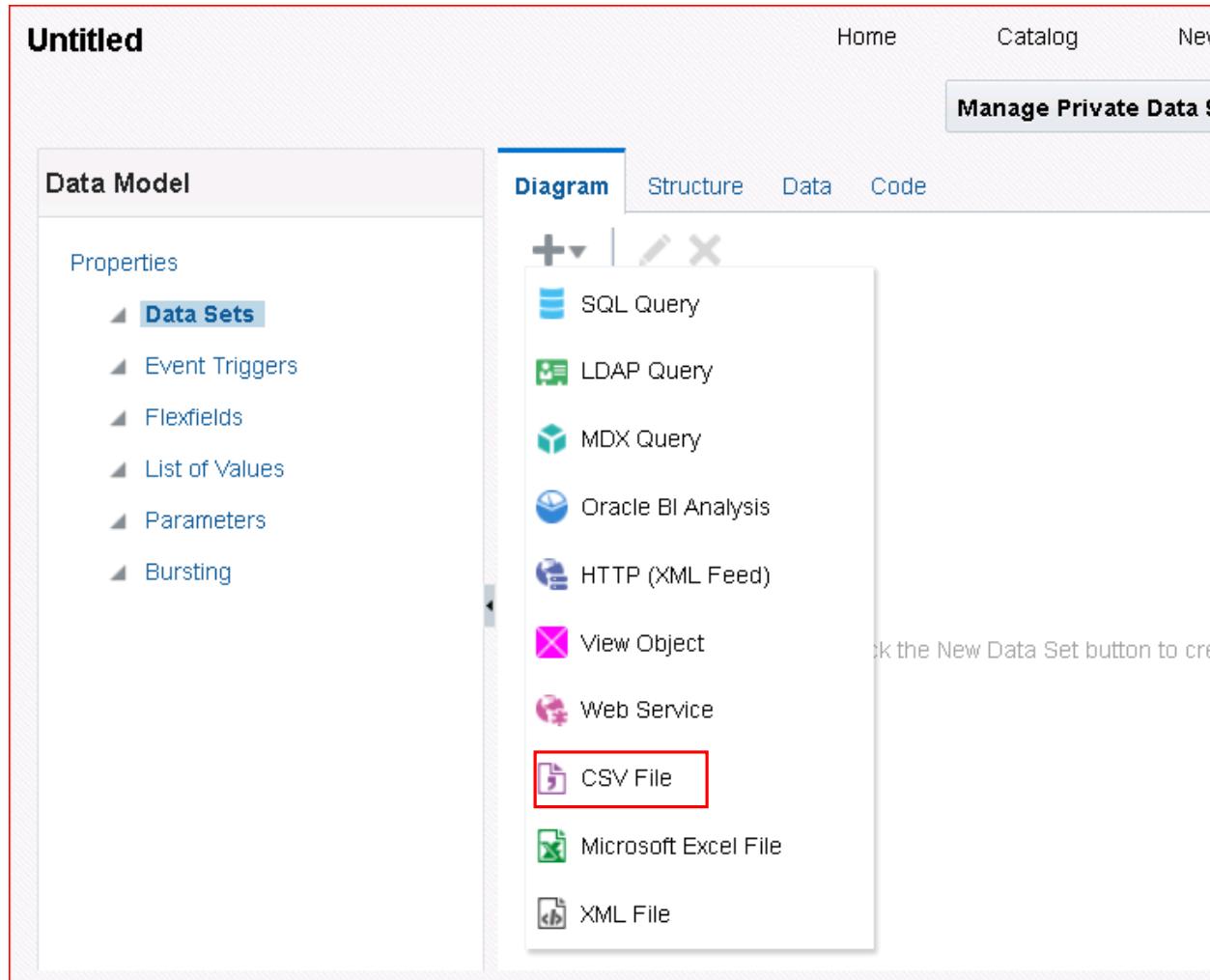
Assumptions

The CSV files that you use should be either in the file location that you have defined before or uploaded to the data model from a local directory. This example uses a local file. This file is available in the MyFiles local folder.

Tasks

1. Click New > Data Model.

2. In the Data Model pane, select **Data Sets**, and then click Data Sets > CSV File.

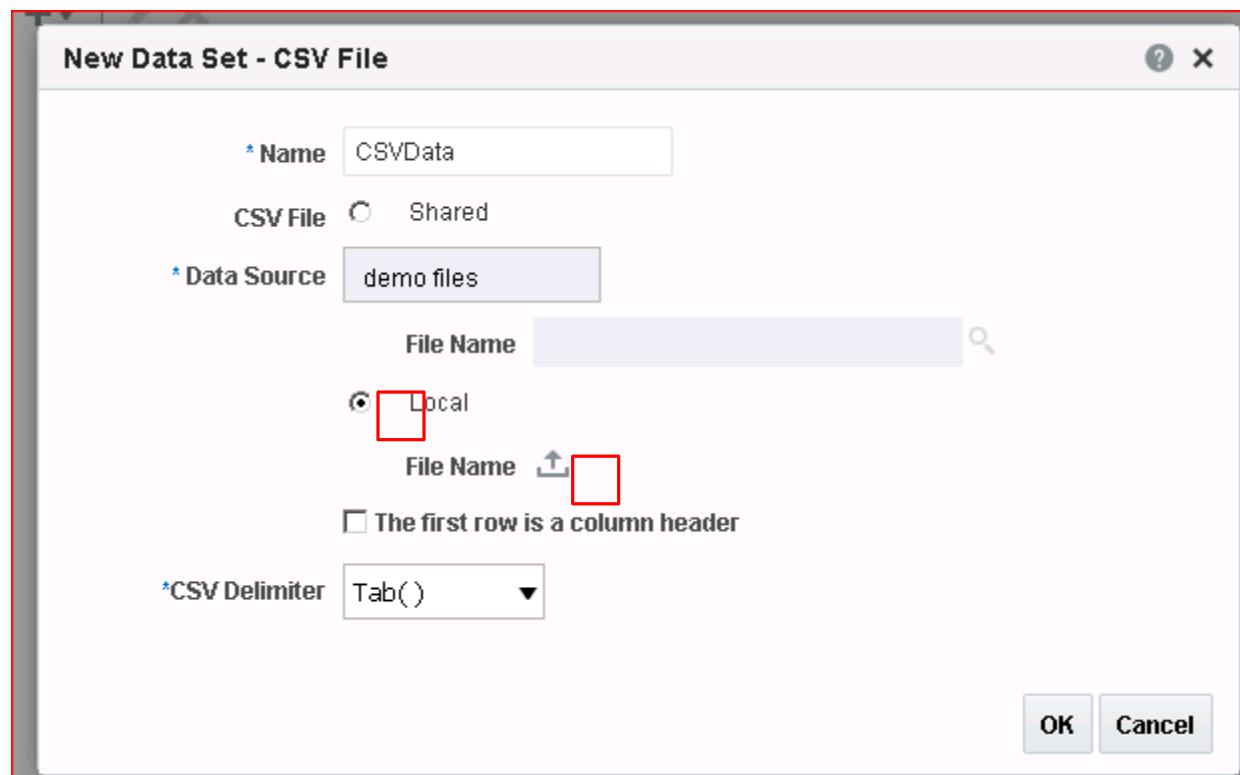


3. In the New Data Set – CSV File dialog box, enter **CSVData** in the Name text box.

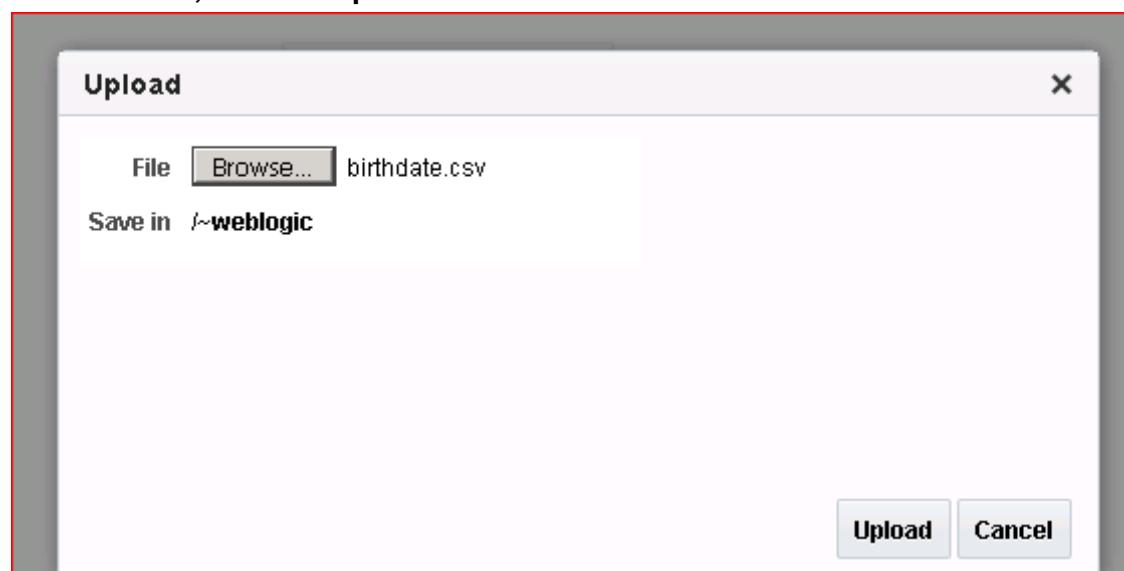
4. Select the **Local** option and click **Upload** ().

Note: If the CSV file is shared, it must be stored in the

`\<FMW_home>\user_projects\domains\bifoundation_domain\config\bipublisher\repository\DemoFiles` directory.



5. In the Upload dialog box, click **Browse**, navigate to the MyFiles local folder, select **birthdate.csv**, and click **Open**.



6. Click **Upload**.

7. Select Tab () as the CSV Delimiter.

8. Click **OK**.

9. The data set is listed in the Data Model pane.

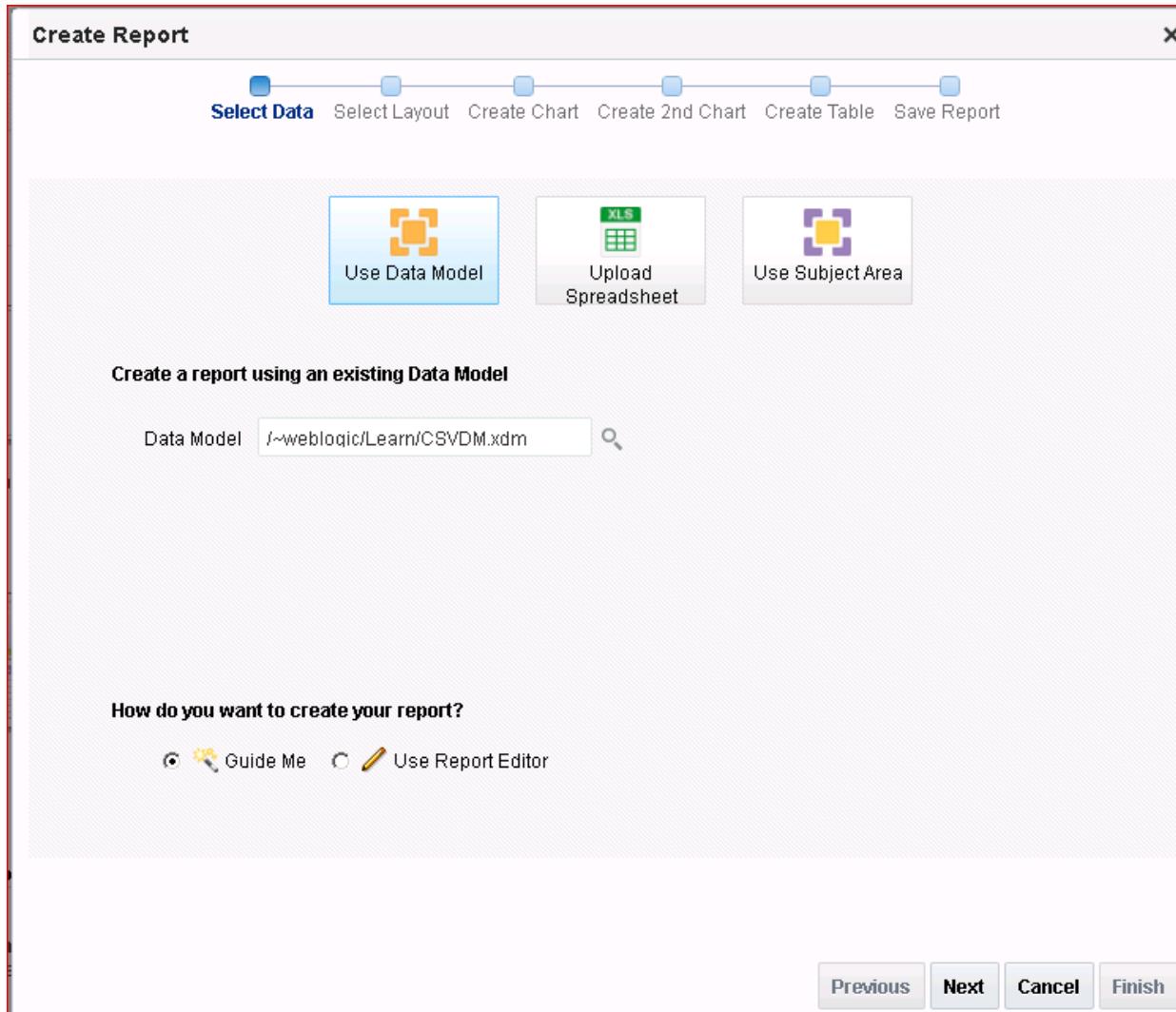
The screenshot shows the Oracle BI Publisher Data Model pane. On the left, a sidebar titled 'Properties' lists 'Data Sets', 'Event Triggers', 'Flexfields', 'List of Values', 'Parameters', and 'Bursting'. Under 'Data Sets', 'CSVData' is selected and highlighted in blue. The main area has tabs for 'Diagram', 'Structure', 'Data', and 'Code', with 'Diagram' currently selected. A 'Global Level Functions' section contains a placeholder 'Drop here for aggregate function'. To the right, a table structure labeled 'G_1' is shown with three columns: 'column1', 'column2', and 'column3'. Each column has a dropdown menu icon ('A▼') and a settings gear icon. Below the table is another placeholder 'Drop here for aggregate function'.

10. Click **Data** and then click **View**. The data is displayed in a tree view.

The screenshot shows the Data Model pane with the 'Data' tab selected. The top bar includes buttons for 'Rows' (set to 5), 'View' (which is highlighted with a red box), 'Export', 'Save As Sample Data' (which is also highlighted with a red box), and 'View Engine Log'. Below this, under 'DATA_DS', a tree view displays four data rows, each labeled 'G_1'. The first row contains 'COLUMN1 (ID)', 'COLUMN2 (NAME)', and 'COLUMN3 (BIRTHDAY)'. The second row contains 'COLUMN1 (1)', 'COLUMN2 (fred)', and 'COLUMN3 (1-Jan-2012)'. The third row contains 'COLUMN1 (2)', 'COLUMN2 (sally)', and 'COLUMN3 (1-Sep-2012)'. The fourth row contains 'COLUMN1 (3)', 'COLUMN2 (sue)', and 'COLUMN3 (1-May-2012)'.

11. Save the sample data.
12. Save the data model as **CSVDM** in the **Learn** folder.
13. Click **Create Report** to create a report based on this data model.

14. In the Create Report Wizard, follow the steps to create a simple report layout.



15. Save the report as **CSVReport** in the Learn folder.
16. Select the View Report option while saving. The report is displayed in Report Viewer.

The screenshot shows the Report Viewer interface with the title 'CSVReport' and a timestamp 'Aug 17, 2018'. The report displays a table with five rows of data:

NAME	BIRTHDAY
fred	1-Jan-2012
sally	1-Sep-2012
sue	1-May-2012