

Publishre report_updated doc

Table of Contents

Publisher Report	3
Introduction to Publisher Report	4
Components of a Publisher Report.....	5
Creating a Publisher Report	8
Creating Templates	11
Creating Templates.....	11
Output Compliance Matrix.....	12
Creating an Excel Template	13
Creating a Word Template	18
Creating an HTML Template	20
Creating a FTL Template	26
Applying Various Templates to Publisher Report.....	31
Applying Templates to Publisher Report	31
Applying Excel Template to Publisher Report	32
Applying Word Template to Publisher Report	37
Applying HTML Template to Publisher Report	39
Applying FTL Template to Publisher Report	40
Viewing Publisher Reports in Various Output Types	41
Viewing the Excel Template Output	41
Viewing Publisher Report in Word.....	43
Viewing Publisher Report in HTML	44
Viewing Output in Required Format	45
Grouping in Publisher Report	47
Creating an Excel Template for Grouping	47
Performing Grouping on Publisher Report	48
Template with Bind Variables	55
Template with Bind Variables.....	55
Excel Template with Bind Variables	56
Word Template with Bind Variables	60

Creating a Word Template with Grouping and Page Break	63
Creating a Word Template with Grouping and Page Break	63
Applying Repeat Header Rows Option.....	64
Without Repeat Header Rows Option	69
Applying Word Template to Publisher Report	72
Viewing the Output	75
Options	76
Options.....	76
Properties.....	77
Templates	79
Generate Link PR.....	80
Delivery Plans	81

Publisher Report

Introduction to Publisher Report

ORBIT **Publisher Report** provides the ability to **Create** and **Manage** formatted reports from a wide range of **Data Sources**.

Prerequisite:

In order to work successfully with Publisher Report, knowledge of SQL queries is useful.

You can design Templates for the **Publisher Report** using the below list

- Microsoft Word
- Microsoft Excel
- HTML
- FTL

Templates created using the above-mentioned tools contain embedded fields with Properties that determine how the data will be merged into the Template.

Publisher Report separates the data creation from the process of formatting it for different uses. It creates custom reports on any Query and offers support for multiple Output Types.

Note: Prior to creating Publisher report in Orbit, you must have different existing templates.

Components of a Publisher Report

For a Publisher Reports, the following components appear when a Band is selected:

- Business Object Area (highlighted as “1”)
- Bands (highlighted as “2”)
- Band Details (highlighted as “3”)
- User Filters area (highlighted as “4”)

The screenshot displays the Publisher Report interface with four numbered components highlighted by red boxes:

- 1. Business Object Area:** A panel on the left with a 'Select Business Object' dropdown and a search bar.
- 2. Bands:** A central panel showing a list of bands, with 'MainBand' selected and highlighted in blue.
- 3. Band Details:** A panel on the right showing details for the selected band, including 'Band Name' (MainBand) and 'Orientation' (Horizontal).
- 4. User Filters area:** A panel at the top right with the text 'Drag and drop fields here to display as user filters'.

Business Objects Area

This section displays the available **Business Object**. When a business object is selected, available objects are displayed.

Bands

Bands section holds the Reports Structured template which we want to set them as default i.e. **Header,Footer**.

It comprises of

- Main Band (Root Band)
- New Band (Header)
 - Query(Where the Data values are set)

We can create any number of New Bands based on the requirement.

Note:

- When a Band is selected Band Details appear on the right.
- When we click Query, Query Details are displayed on the right.
- Band Name must be the same as we mention in the Name field in the Excel/Word/HTML templates.

Band Details

When a band is selected (here **Header**), its corresponding band details appear on the right under **Band Details** section.

Under **Band Details**, the following parameters appear:

- **Band Name**
- **Orientation: Horizontal or Vertical**

Note: Horizontal Bands are copied downwards and Vertical to the right. Horizontal bands may contain sub-bands.

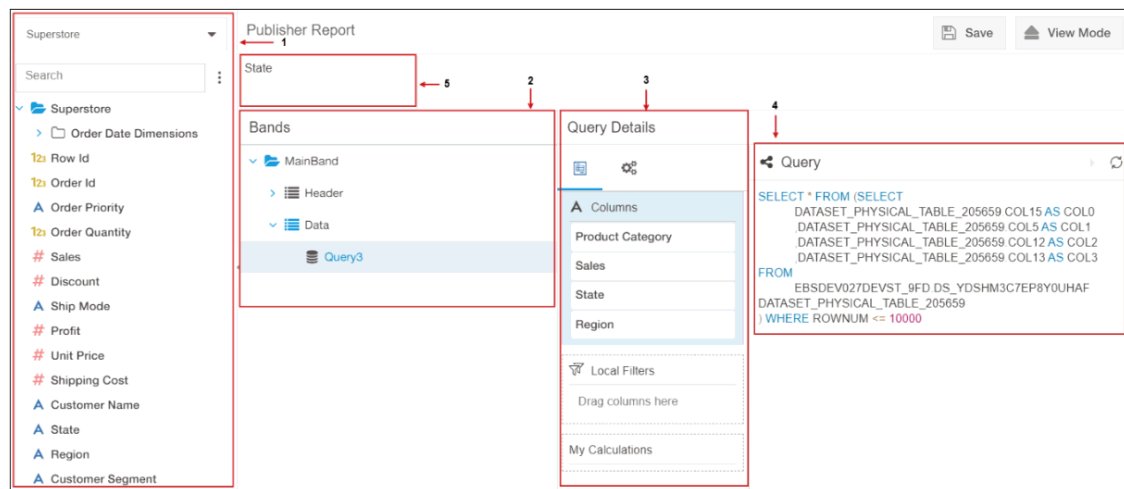
Bands	Band Details
<div>▼ MainBand</div> <div>Header</div> <div>▼ Data</div> <div>Query4</div>	<div>Band Name: Header</div> <div>Orientation: Horizontal</div> <div>Horizontal</div> <div>Vertical</div>

User Filters

User Filters are parameter-based filters that allow the user to input a value to filter the data in the report.

For a Publisher Report, the following components appear when a query is selected:

- Business Object Area (highlighted as “1”)
- Bands (highlighted as “2”)
- Query Details (highlighted as “3”) (This appears when a query is selected in **Bands** section.)
- Query (highlighted as “4”) (This appears when a query is selected in **Bands** section.)
- User Filter area (highlighted as “5”)



Query Details

Query Details section has the following:




- **Configurator**- The objects dragged from BO area appear here. Based on the **Columns** in this section, query is built under **Query** section.
- **Local Filters** - They are used to segregate huge data in the database while building reports.
- **Query Settings** - This section provides the option to configure Row Limit, Query Timeout, and Select Distinct options.

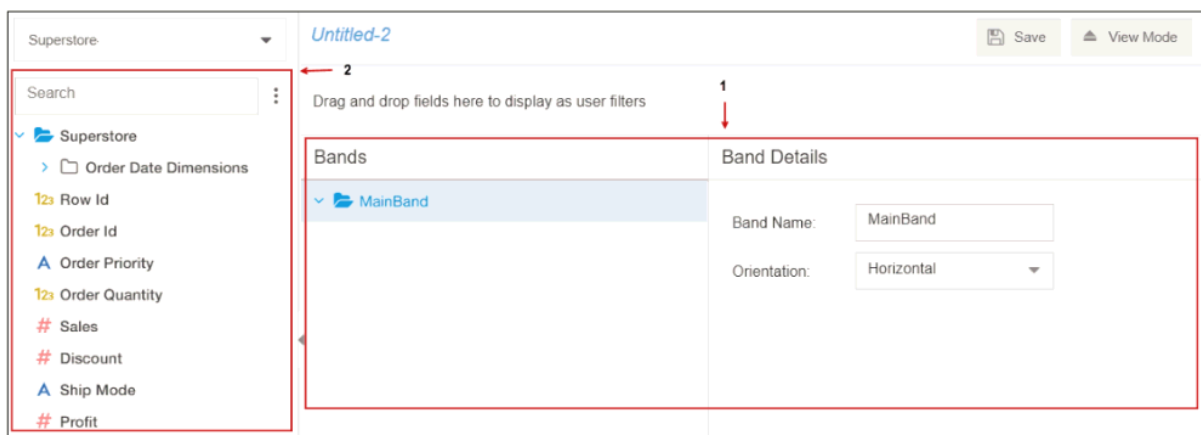
Query

When the columns are dragged into the **Configurator** from BO area into **Query Details**, the query is automatically generated in **Query** section.

Creating a Publisher Report

Steps to Create a Publisher Report


1. In the Orbit Application click  **Reports**, click **New**  and then click .
2. A new window appears with **Select Business Object**, **Bands**, and **Band Details** sections (highlighted as “1”).
3. In the **Select Business Object** area, select the required Business object.
4. The columns under the selected business object (highlighted as “2”) appear.

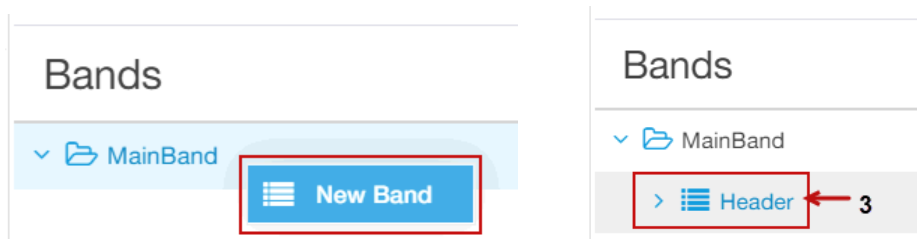


5. Under the **Bands** section, **MainBand** appears.

Note:

- One band can have multiple child bands under it and a band can also have multiple queries under it.
- Bands in the Publisher Report maps to Names in Excel sheet.

6. On the MainBand, right-click and then select **New Band** to create a new band (OR) Hover the cursor on the MainBand, click , and then click **New Band** (highlighted as “3”).





When a specific band is selected, the **Band Details** appear on the Right side.
(highlighted as “4”).



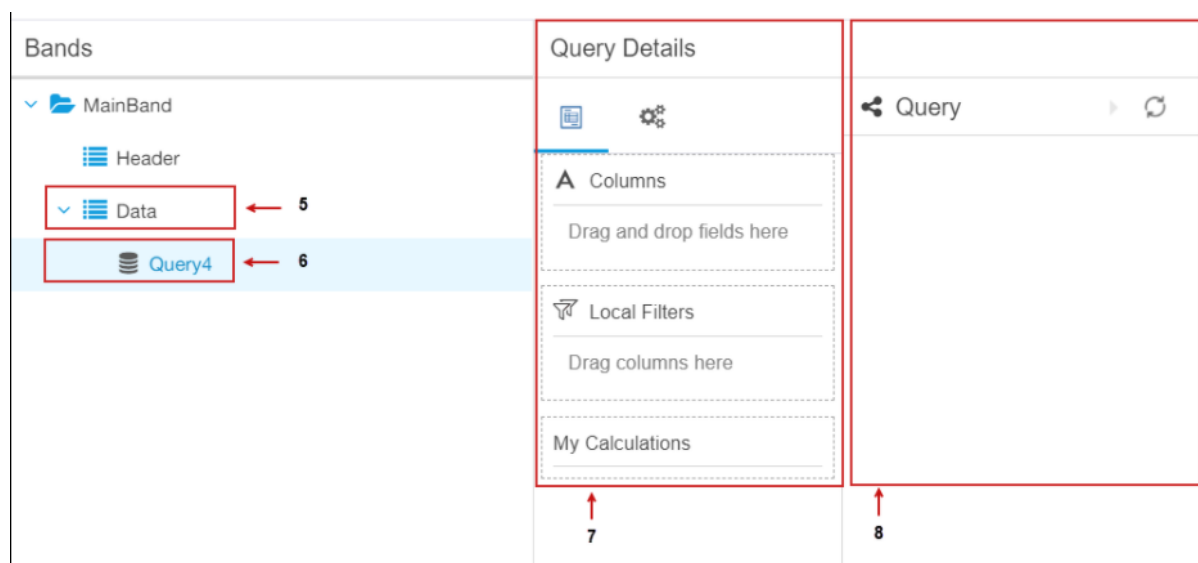
Note:

- You can change the Band name either by double-clicking it or you can change it under **Band Details**.
- The default orientation is **Horizontal**. You can change the orientation to **Vertical** as well. The orientation describes direction of the data display.
- Here, **Header** band is for the Header band that we created in the excel sheet. Now, we would be creating data band to extract the data under **Header**.

7. On the **MainBand**, right-click and then select **New Band** to create a new band
(OR) Hover the cursor on the **MainBand**, click  , and then click **New Band**.



8. On the **Data** band (highlighted as “5”), right-click, and then Select **New Query**
(OR) Hover the cursor on the **Data** band, click  , and then click **New Query**.

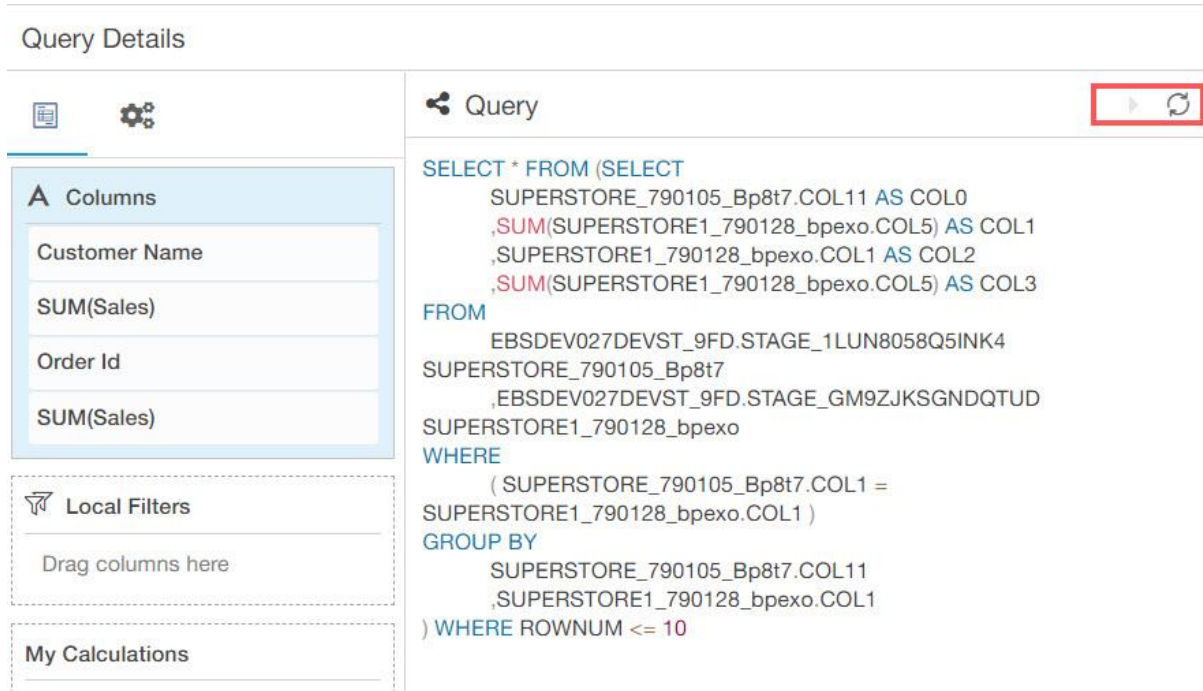
9. **Query Details** (highlighted as “7”) and **Query** (highlighted as “8”) sections appear.



10. Drag and drop the objects into the Columns from Business Object area to the **Configurator** under **Query Details**.

11. To build your own Calculation , click ▼ next to **My calculations** and then click **New Calculation**.

12. Under the **Query** section, a query is built based on the dragged columns. For a quick check of the output click  and to refresh the query click  as shown in the figure below.



Query Details

Columns

- Customer Name
- SUM(Sales)
- Order Id
- SUM(Sales)

Local Filters

Drag columns here

My Calculations

Query

```
SELECT * FROM (SELECT
  SUPERSTORE_790105_Bp8t7.COL11 AS COL0
  ,SUM(SUPERSTORE1_790128_bpexo.COL5) AS COL1
  ,SUPERSTORE1_790128_bpexo.COL1 AS COL2
  ,SUM(SUPERSTORE1_790128_bpexo.COL5) AS COL3
FROM
  EBSDEV027DEVST_9FD.STAGE_1LUN8058Q5INK4
  SUPERSTORE_790105_Bp8t7
  ,EBSDEV027DEVST_9FD.STAGE_GM9ZJKSGNDQTUD
  SUPERSTORE1_790128_bpexo
WHERE
  ( SUPERSTORE_790105_Bp8t7.COL1 =
  SUPERSTORE1_790128_bpexo.COL1 )
GROUP BY
  SUPERSTORE_790105_Bp8t7.COL11
  ,SUPERSTORE1_790128_bpexo.COL1
) WHERE ROWNUM <= 10
```

13 . Save the report under appropriate folder, by clicking **Save** a message of



appears on the top.

Creating Templates

Creating Templates

This section deals with creating the following:

- [Creating an Excel Template](#)
- [Creating a Word Template](#)
- [Creating a HTML Template](#)
- [Creating a FTL Template](#)
- [Creating an Excel Template for Grouping](#)

Output Compliance Matrix

The reports we generate can be viewed in the below mentioned Output formats.

Template / Output	XLSX	XLS	DOCX	DOC	PDF	HTML	TXT
XLSX	✓				✓		
XLS		✓			✓		
DOCX			✓		✓	✓	
DOC				✓	✓		
HTML					✓	✓	
FTL						✓	✓

Creating an Excel Template

Steps to Create an Excel Template

1. Open the **Excel Sheet**.
2. In the Excel sheet, enter the Header (E.g Company Name) in the column as shown in the below figure (highlighted as 1)

A	B	C	D
1	Orbit Analytics Software Solution		
Customer Name	Invoice_ID	Price	Sales
\${COL0}	\${COL1}	\${COL2}	\${COL3}
Footer			

3. Enter the required field Names (E.g Customer Name, Invoice_ID) to extract the column values under it as shown in below figure (highlighted as 2)

A	B	C	D
Orbit Analytics Software Solution			
Customer Name	Invoice_ID	Price	2
2			
Customer Name	Invoice_ID	Price	Sales
\${COL0}	\${COL1}	\${COL2}	\${COL3}
Footer			

4. Enter the column values **\${COL0}**, **\${COL1}** and so on, these should be the same as mentioned in the **Query** section in Publisher Report. As shown in the figure below,

Query Details

Columns

Customer Name

Order Id

SUM(Sales)

SUM(Sales)

Local Filters

Drag columns here

My Calculations

Customer Name	Order_ID	Price	Sales
#{COL0}	#{COL1}	#{COL2}	#{COL3}

Query


```

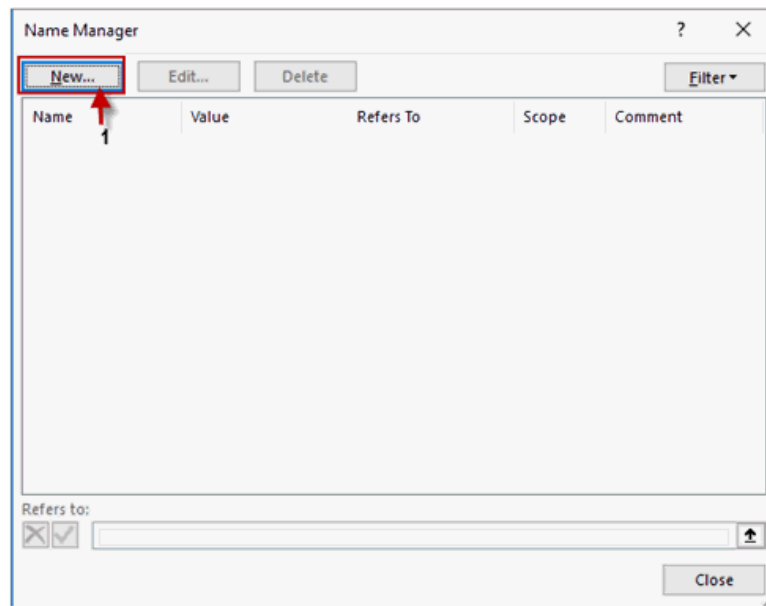
SELECT * FROM (SELECT
    SUPERSTORE_790105_Bp8t7.COL11 AS COL0
    ,SUPERSTORE1_790128_bpexo.COL1 AS COL1
    ,SUM(SUPERSTORE1_790128_bpexo.COL5) AS COL2
    ,SUM(SUPERSTORE1_790128_bpexo.COL5) AS COL3
FROM
    EBSDEV027DEVST_9FD.STAGE_1LUN8058Q5INK4
    SUPERSTORE_790105_Bp8t7
    ,EBSDEV027DEVST_9FD.STAGE_GM9ZJKSGNDQTUD
    SUPERSTORE1_790128_bpexo
WHERE
    ( SUPERSTORE_790105_Bp8t7.COL1 =
    SUPERSTORE1_790128_bpexo.COL1 )
GROUP BY
    SUPERSTORE_790105_Bp8t7.COL11
    ,SUPERSTORE1_790128_bpexo.COL1
) WHERE ROWNUM <= 10

```

Now,create different **Names**(E.g Header, Footer etc.) in the Excel sheet similar to **Bands** name in **Orbit Publisher Report**.

Steps to Create a Name in Excel Sheet

1. On the Ribbon click **Formulas**, in the **Defined Names** group, click  **Name Manager**.
2. **Name Manager** dialog box appears.

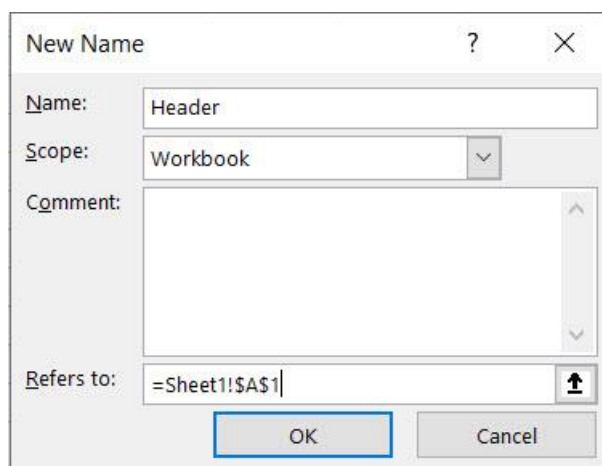



3. To create a new band, click **New** (highlighted as “1”).

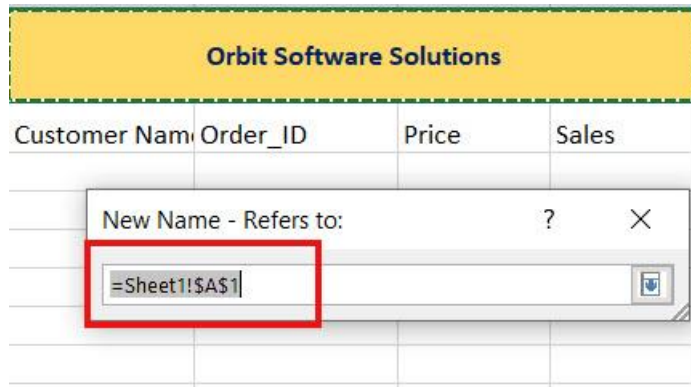
4. **New Name** dialog box appears.


5. In the **New Name** dialog box, perform the following:

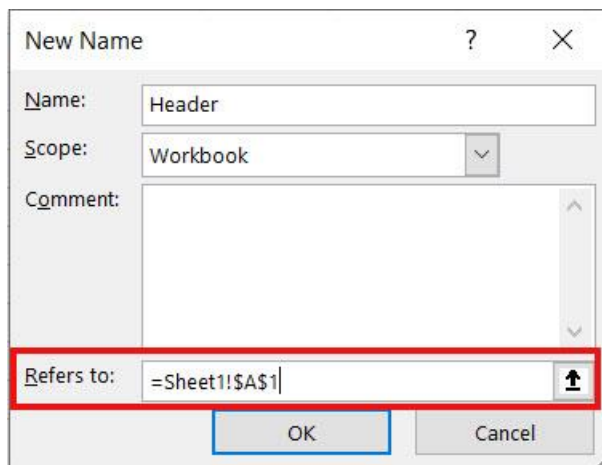
- In the **Name** box, type the name of the band.



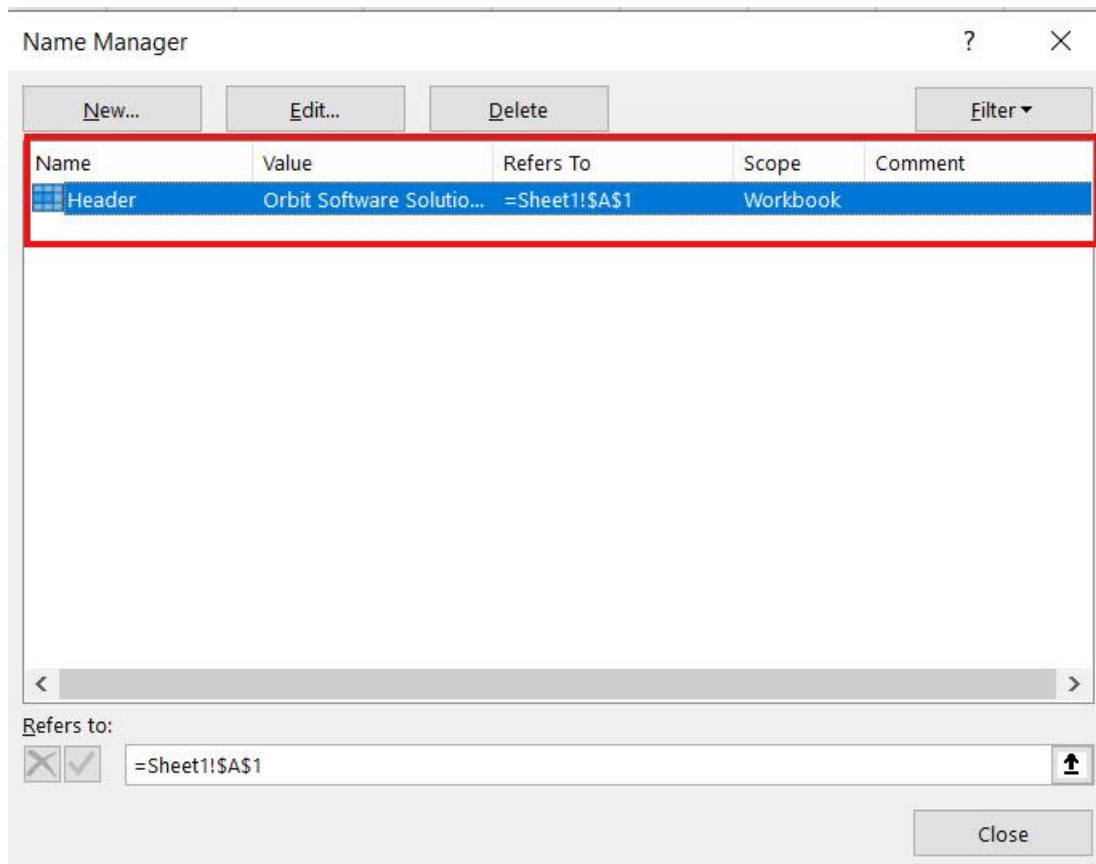
- To enter the values in the **Refers to** box, click  beside the **Refers to**.
- **New Name – Refers to** dialog box appears with the cursor inside the textbox, once the required cells are selected the formula appears, refer the below image.



- Click  to navigate to the **New Name** dialogue box.
- The selected cell values appear in the **Refers to** textbox as shown in the figure below.



- To save the changes, click **OK**.
- The Band name appears in the **Name Manager** dialog box as shown in the figure below.



- To close the dialog box, click **Close**.
- Now create a **New Name band "Data"**, and place the column values **#{COL0}**, **#{COL1}** and so on in the **Data** band using the above process.
- Save the Workbook with an appropriate name and click Close.

Note:

- If a **New Band** is created in the Publisher Report and if we don't create a Name Manager in the template then the contents wont be displayed in the Output file.
- Table and Pivot cannot be used for creating templates in Excel.

Creating a Word Template

Steps to Create a Word Template:

1. Open the **Word document**.
2. Type in the Content area as "\${Reportdata.COL0}"refer the below figure i.e. The same **Band name** mentioned in the Publisher Report under **MainBand**.

Min Salary= \${Headerval.COL0}

1

##band=Data	Job	MGR	Sal
Ename			
\${COL0}	\${COL1}	\${COL2}	\${COL3}

E.g. Here, Minium Salary is the filter..

3. As shown in the figure below to extract the column values mention in it as "**##band=Data**" (highlighted as "2"). Type the required **Column Names**. E.g. Ename, Job etc.

Min Salary= \${Headerval.COL0}

##band=Data	Job	MGR	Sal
Ename			
\${COL0}	\${COL1}	\${COL2}	\${COL3}

4. To extract the column values under the required columns, enter the column numbers as **\${COL0}**, **\${COL1}**, and so on as shown in the above figure.(Highlighted as "3")
5. Save the **Word document** with an appropriate name.

Note:

- To retrieve the vales in multiple fields we need to insert a table in the Word Template file

Creating an HTML Template

To create the Template in HTML the below mentioned code need to be provided for the **Style elements**.

The **Style elements** must be placed between <head> and </head> tags.

```
<head> <meta charset="UTF-8"> <title>Untitled Document</title> <style type="text/css">
.report-table-details {
    margin-bottom: 0px;
    border: solid #dfdcdc 1px;
    min-width: 550px;
}
.report-table-details th {
    background: #1777cb;
    padding-top: 8px;
    padding-bottom: 8px;
    color: #fff;
    text-align: left;
    padding-left: 20px;
    font-size: 14px;
    font-family: lato;
}
.report-table-details td {
    padding-top: 10px;
    padding-bottom: 10px;
    padding-left: 20px;
    padding-right: 20px;
    color: #fff;
    font-family: lato;
    font-size: 14px;
    border-right: 1px solid #dfdcdc;
    border-bottom: 1px solid #dfdcdc;
}
.report-table-details td:first-child {
    font-weight: bold;
    color: #5a5a5a
}
.report-table-details td:last-child {
    padding-left: 20px;
    color: #1777cb;
    border-right: none
}
</style>
```

```
.report-table-details tr:last-child td {
    border-bottom: none
}

.report-table {
    border: solid #dfdcdc 1px;
    font-family: lato;
}

.report-table th {
    background-color: #1777cb;
    color: #fff;
    font-size: 14px;
    padding-top: 10px;
    padding-bottom: 10px;
    border-right: 1px solid #dfdcdc;
    text-align: left;
    padding-left: 30px;
}

.report-table th:last-child {
    border-right: none;
}

.report-table td {
    color: #5a5a5a;
    font-size: 13px;
    padding-left: 30px;
    border-right: 1px solid #dfdcdc;
    border-bottom: 1px solid #dfdcdc;
    padding-top: 8px;
    padding-bottom: 8px;
}

.report-table td:last-child {
    border-right: none;
}

.report-table tr:nth-child(even) {
    background: #fff
}

.report-table tr:nth-child(odd) {
    background: #f8f8f8
}

.reportgrid-title {
    font-size: 40px;
    color: #5a5a5a;
    font-family: lato;
}
```

```

float: left;
font-weight: bold;
margin-bottom: 20px;
margin-top: 20px;
}
.report-table tr:last-child td {
border-bottom: none
}
.details-div {
clear: left;
}
.cust-logo {
float: right;
margin-top: 30px;
margin-right: 30px;
}
.cust-logo img {
width: 130px;
}
</style> </head>

```

The following code provides the **Data** for the required columns. Place the following code in between the tags <body> </body>.

Band is assigned in the following code as <#assign groups = Root.bands.Header>.


```

<body>
  <div style="margin: 0px auto;">
    <div class="details-div">
      <#assign
groups=Root.bands.Header>
      <br>
      <#list groups as Hname>
        <table width="100%"
class="report-table" border="0"
cellpadding="0" cellspacing="0">
          <tbody>
            <tr>
              <th
scope="col">Name</th>
              <th
scope="col">${Hname.fields.COL0}</th>
            </tr>
            <tr>
              <th> CUTOMER
NAME</th>
              <th>
PRIORITY</th>
              <th> ORDER
DATE</th>
              <th> QUANTITY
</th>
              <th> UNIT
PRICE</th>
              <th>
TOTAL</th>
            </tr>
            <#list
Hname.bands.Data as data>
              <tr>
                <td
nowrap=true> ${data.fields.COL0} </td>
                <td
nowrap=true> ${data.fields.COL1} </td>
                <td
nowrap=true> ${data.fields.COL2} </td>

```

```
                <td
nowrap=true> ${data.fields.COL3} </td>
                <td
nowrap=true> ${data.fields.COL4} </td>
                <td
nowrap=true> ${data.fields.COL5} </td>
            </tr>
        </#list>
    </tbody>
</table>
</#list>
</div>

</div>
</body>
```


Creating a FTL Template

The output for FTL Templates is available in **HTML and TXT**.

- The following code provides the required style elements for the FTL Template .
- The style elements must be placed between <head> and </head> tags.
- The below mentioned code must be placed in between <html> and </html> tags.

```
<head>
<meta charset="UTF-8">
<title>Untitled Document</title>
<style type="text/css">

.report-table-details{ margin-bottom: 0px; border: solid #dfdcdc 1px; min-width:
550px; }
.report-table-details th{background: #1777cb; padding-top: 8px; padding-bottom:
8px; color: #fff; text-align:left; padding-left: 20px; font-size: 14px;font-family: lato;}
.report-table-details td{ padding-top:10px; padding-bottom: 10px; padding-left: 20px;
padding-right: 20px;color: #fff; font-family: lato; font-size: 14px;border-right: 1px
solid #dfdcdc; border-bottom: 1px solid #dfdcdc; }
.report-table-details td:first-child{font-weight: bold; color:#5a5a5a}
.report-table-details td:last-child{ padding-left:20px; color: #1777cb; border-right:
none}
.report-table-details tr:last-child td{border-bottom: none}

.report-table{border: solid #dfdcdc 1px; font-family: lato; }
.report-table th{ background-color: #1777cb; color: #fff; font-size:14px; padding-top:
10px; padding-bottom: 10px;
border-right: 1px solid #dfdcdc; text-align: left; padding-left: 30px;}
.report-table th:last-child{border-right: none;}
.report-table td{ color: #5a5a5a;font-size: 13px; padding-left: 30px;border-right: 1px
solid #dfdcdc; border-bottom: 1px solid #dfdcdc; padding-top: 8px; padding-bottom:
8px; }
.report-table td:last-child{border-right: none;}
```

```

.report-table tr:nth-child(even) {background: #fff}
.report-table tr:nth-child(odd) {background: #f8f8f8}
.reportgrid-title{ font-size: 40px; color:#5a5a5a; font-family: lato; float: left;font-
weight: bold; margin-bottom: 20px; margin-top: 20px;}
.report-table tr:last-child td{border-bottom: none}
.details-div{clear: left;}
.cust-logo{ float: right; margin-top: 30px;margin-right:30px; }
.cust-logo img {width: 130px;}
</style>
</head>
<body>
<div style="margin: 0px auto;">
<div class="details-div">
<#assign tabledata = Root.bands.Data>

<table width="100%" class="report-table" border="0" cellpadding="0" cellspacing="0"
>
<tbody>
  <tr>
    <th> EMPNO</th>
    <th> EName</th>
    <th> SAL</th>
    <th> MGR</th>
  </tr>

  <#list tabledata as data>
  <tr>
    <td nowrap=true> ${data.fields.COL0} </td>
    <td nowrap=true> ${data.fields.COL1} </td>
    <td nowrap=true> ${data.fields.COL2} </td>

```

```
                <td nowrap=true> ${data.fields.COL3} </td>
</tr>
</#list>
</tbody>
</table>
</div>

</div>
</body>
```

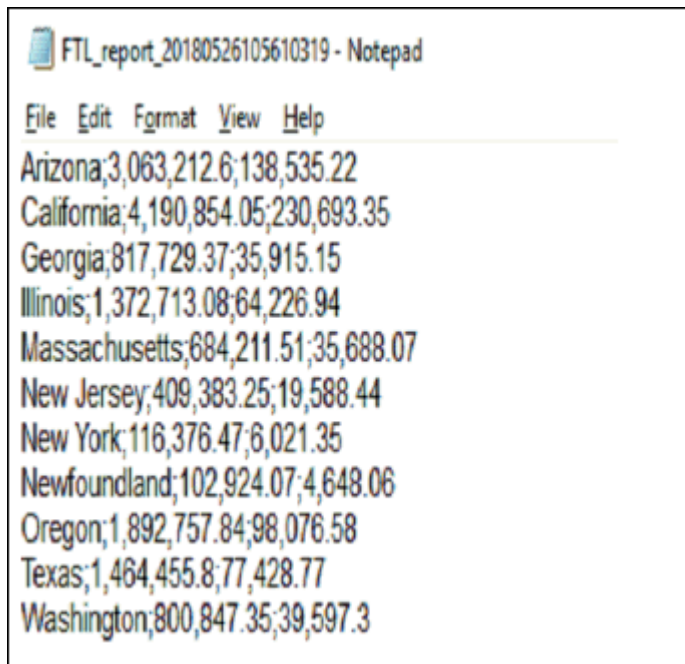
Save the file with **.ftl** as an extension and click **Save**.

HTML Output

The HTML Output for the above-mentioned code appears as follows:

TXT Output:

TXT Output for the above-mentioned code is as follows:



Excel Output:

To view the TXT File data in Excel, import the data into excel from “. TXT” file, and then view the output in excel. The output appears as follows:

G16						
	A	B	C	D	E	F
2	Arizona	3,063,212.60	138,535.22			
3	California	4,190,854.05	230,693.35			
4	Georgia	817,729.37	35,915.15			
5	Illinois	1,372,713.08	64,226.94			
6	Massachusetts	684,211.51	35,688.07			
7	New Jersey	409,383.25	19,588.44			
8	New York	116,376.47	6,021.35			
9	Newfoundland	102,924.07	4,648.06			
10	Oregon	1,892,757.84	98,076.58			
11	Texas	1,464,455.80	77,428.77			
12	Washington	800,847.35	39,597.30			
13						

Applying Various Templates to Publisher Report

Applying Templates to Publisher Report

To view a Publisher Report in Excel, perform the following:


- [Creating a Publisher Report](#)
- [Applying Excel Template to Publisher Report](#)

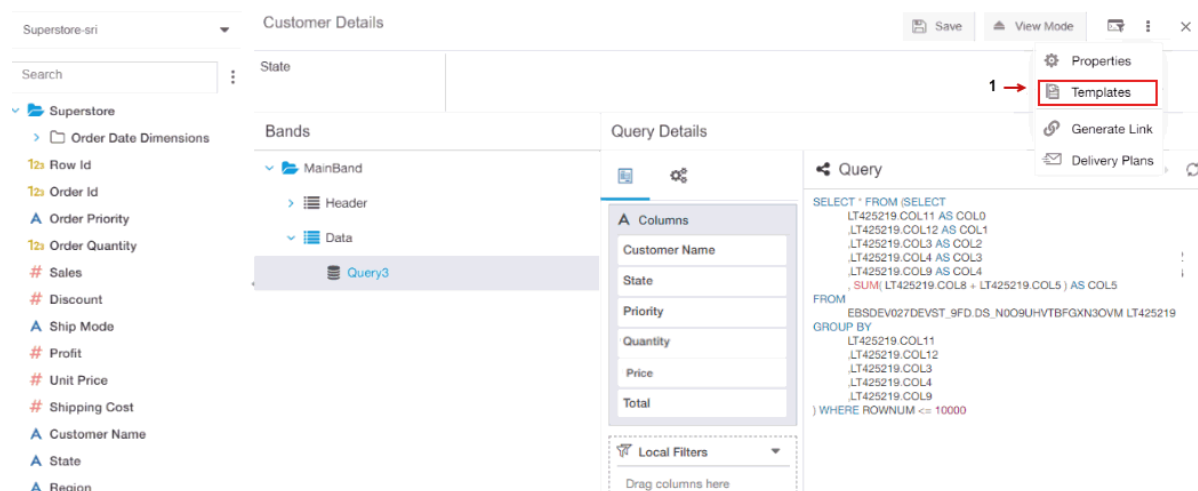
Applying Excel Template to Publisher Report

Note:

- Prior applying an **Excel Template** to a Publisher Report, the user must have an existing Template available in Microsoft Excel. See [Creating an Excel Template](#) for more information.

Steps to Apply Excel Template to Publisher Report

1. On the extreme right-hand side, click  **Options**, and then click **Templates** (highlighted as “1”).



2. **Templates** dialog appears, to create a new template, click **New Template**.

Templates

Name	Short Name	Description	Type	Default Ou...	Default	Actions

New TemplateClose

3. Enter the required details in the **Templates** dialogue box.

Templates

Name

Short Name

Description

Type

ORBIT

Upload

Upload file...

Default Output

Save

Cancel

Close

4. In the **Name** box, type the name of the template.

5. In the **Short Name** box, type the short name for the template.

Note:

- This field accepts only Aplha-Numeric without space

6. In the **Description** box, type the description.

7. In the **Type** box, “**ORBIT**” is selected by default.
8. To upload the required template, click **Upload file** that appears next to the **Upload** textbox.
9. In the **Default Output** box, type/select the required default output option depending upon the template.

Templates

Name

Template

Short Name

PRTEMP

Description

sample template for testing

Type

ORBIT

Upload

C:\fakepath\New PR template.xlsx

Upload file...

Default Output

XLSX



Save

Cancel

Close

10. To upload the template, click **Save**.
11. The uploaded template appears under **Templates**.

Templates

Name	Short Name	Description	Type	Default ...	Download	Default	Actions
Template	PRTEMP	sample template for te...	ORBIT	XLSX	New PR...	<input type="checkbox"/>	 

New Template

Close

12. To make the template as a default template, select the required template, and then click **Make Default** (highlighted as “2”).

Templates

×

Name	Short Name	Description	Type	Default ...	Download	Default	Actions
Template	PRTEMP	sample template for te...	ORBIT	XLSX	New PR...	<input type="checkbox"/>	

New Template

Make Default

2

Close

13. A checkmark (highlighted as “3”) appears in the **Default** checkbox for the selected template.

Templates

×

Name	Short Name	Description	Type	Default ...	Download	Default	Actions
Template	PRTEMP	sample template for te...	ORBIT	XLSX	New PR...	<input checked="" type="checkbox"/>	

New Template

Remove Default

3

Close

14. To remove the selected template from being a default template, click **Remove Default**.

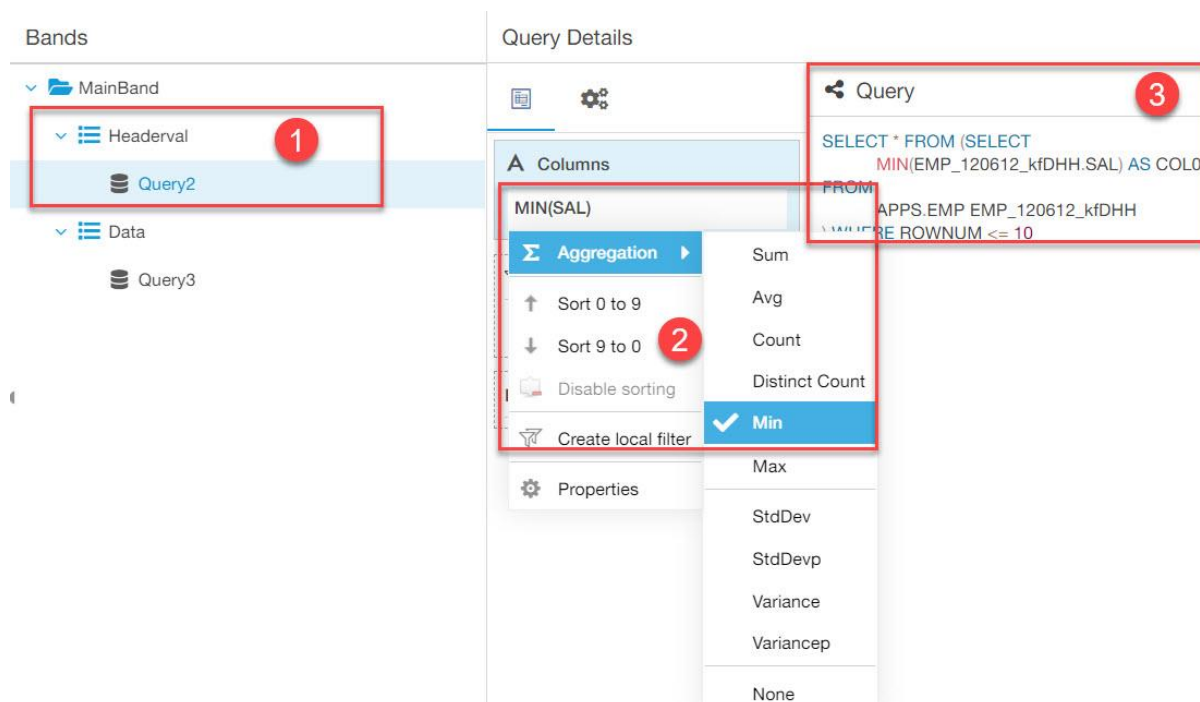
15. To close Templates box, click **Close**.

Applying Word Template to Publisher Report

Note:

- Prior applying the Word Template, User need to have an existing **Word Template**. See [Creating a Word Template](#) for more information.

- For the Minimum Salary as a parameter, provide the required filter in the **Query Details of Publisher Report**.
 - Define the **New Band**(Highlighted as 1) and add a New Query drag the **SAL object** into the column and mention **Aggregation** as **Min** (Highlighted as 2) automatically the **Query** is built(Highlighted as 3)as shown in the figure below.



Word Template need to be uploaded in a similar way as Excel Template in the Publisher report. For more details see [Applying Excel Template to Publisher Report](#)

- Click **Save**, *Report saved Successfully* message appears

✓ Report saved successfully.

Applying HTML Template to Publisher Report

Note:

- User need to have an existing HTML Template to be applied. See [Creating a HTML Template](#) for more details

1. Perform the process of [Applying grouping in the Publisher Report](#).
2. Upload the Template file in a similar way as [Applying Excel Template to Publisher Report](#)

3. Click **Save**  message appears on the top.

Applying FTL Template to Publisher Report



Note:

- Prior applying the FTL Template user need to have an existing once. See [How to Create an FTL Template](#) for more information.

1. Upload the FTL Template, as in [Applying Excel Template to Publisher Report](#)
2. Save the **Report**.

Viewing Publisher Reports in Various Output Types

Viewing the Excel Template Output

1. Once the **Excel Template** is applied and the report is saved. then click  **View Mode**.
2. **View Mode** appears, In the **Select template** box, the default Excel template appears.
3. In the **Select Output** box, the default output appears.
4. To Run the report, click  **Run**.
5. The report appears in the excel sheet as follows:

Orbit Analytics Software Solution		
Customer Name	Price	Sales
Amy Cox	19524	92.02
Amy Cox	21890	1154.8
Amy Cox	25536	193.25
Amy Cox	34918	4863.48
Amy Cox	36929	9929.92
Amy Cox	38145	896.18
Amy Cox	40103	353.02
Amy Cox	48455	3077.88
Amy Cox	48773	51.27
Amy Cox	54151	541.98
Footer		


Procedure for changing the Order of the Columns

- If you need to change the order of the columns in the ORBIT Publisher, you must change the template accordingly.
- For Example, in the excel template “**Customer Name**” is the first column(\$COL0) and “**State**” is the second column (\$COL1).
- If you want to display the “**State**” as the first column and “**Customer Name**” as the second column (as displayed in the figure below), then you must

change it in the EXCEL Template as shown in the figure above and repeat the above procedure to Add the template once again and run the report.

- If the user tries to export the Excel Template as HTML output, the output file generates only first sheet of the excel.

To view the report in PDF format, select the required Template, select the Output

Type as PDF, and then click  **Run.**

Viewing Publisher Report in Word

1. Click **View mode**, select the required **Template** (Highlighted as 1) from the drop down and the **Output Type** (Highlighted as 2) as shown in below figure and click **Run**.(Highlighted as 3)

The screenshot shows a web interface for generating a report. On the left, there is a dropdown menu for selecting a template. The current selection is 'new1', and the dropdown list is open, showing three options: 'Empfile1', 'empreport1' (highlighted in blue), and 'new1'. A red circle with the number '1' is placed over the 'empreport1' option. To the right of the template dropdown is a dropdown menu for selecting the output type, currently set to 'DOCX'. A red circle with the number '2' is placed over this dropdown. To the right of the output type dropdown is a blue button with a play icon and the text 'Run'. A red circle with the number '3' is placed over this button.

2. The report opens in a word document as shown in the below figure.

Min Salary= 800

Ename	Job	MGR	Sal
KING	PRESIDENT		5000
BLAKE	MANAGER	7839	2850
CLARK	MANAGER	7839	2450
JONES	MANAGER	7839	2975
SCOTT	ANALYST	7566	3000
FORD	ANALYST	7566	3000
SMITH	CLERK	7902	800
ALLEN	SALESMAN	7698	1600
WARD	SALESMAN	7698	1250
MARTIN	SALESMAN	7698	1250

Viewing Publisher Report in HTML

1. Click **View Mode**.
2. In the **Select template** box, select the required template.
3. In the **Select Output** box, select the required output(E.g. HTML) from the available outputs.
4. To run the report, click **Run**. The Output is displayed as mentioned below.

HTML_Pub_report

TEmp1

HTML

Run Edit Mode

Name	Central				
CUSTOMER NAME	PRIORITY	ORDER DATE	QUANTITY	UNIT PRICE	TOTAL
Noah Childs	9	Mar 19, 2009 12:00:00 AM	9	270.97	Central
Noah Childs	29	Mar 19, 2009 12:00:00 AM	29	12.28	Central
Evan Minnotte	11	Sep 5, 2009 12:00:00 AM	11	442.14	Central
Guy Armstrong	7	Nov 3, 2009 12:00:00 AM	7	70.98	Central
Guy Armstrong	18	Mar 26, 2011 12:00:00 AM	18	210.55	Central
Guy Armstrong	10	Mar 26, 2011 12:00:00 AM	10	182.55	Central
Chuck Magee	20	Feb 10, 2012 12:00:00 AM	20	32.98	Central
Greg Guthrie	37	May 6, 2009 12:00:00 AM	37	40.98	Central
Greg Guthrie	2	May 6, 2009 12:00:00 AM	2	417.4	Central
Carlos Soltero	43	Nov 23, 2010 12:00:00 AM	43	35.99	Central

Name	East				
CUSTOMER NAME	PRIORITY	ORDER DATE	QUANTITY	UNIT PRICE	TOTAL
Sylvia Foulston	4	Aug 28, 2011 12:00:00 AM	4	300.98	East
Nicole Hansen	19	Sep 29, 2011 12:00:00 AM	19	19.98	East
Nicole Hansen	24	Sep 29, 2011 12:00:00 AM	24	6.48	East

Note:

As the grouping is done we can view the output accordingly.

Viewing Output in Required Format

1. Switch to **View Mode**.
2. In the **Select template** box, select the required template.(Highlighted as 1)
3. In the **Select Output** box, select the required output from the available outputs.(Highlighted as 2)
4. To run the report, click **Run**.(Highlighted as 3)

HTML Output:

New Rep

1 FTL1 2 HTML 3 Run

EMPNO	EName	SAL	MOA
7,839	KING	5,000	
7,698	BLAKE	2,850	7,839
7,782	CLARK	2,450	7,839
7,566	JONES	2,975	7,839
7,788	SCOTT	3,000	7,566
7,902	FORD	3,000	7,566
7,369	SMITH	800	7,902
7,499	ALLEN	1,600	7,698
7,521	WARD	1,250	7,698
7,654	MARTIN	1,250	7,698
7,844	TURNER	1,500	7,698
7,876	ADAMS	1,100	7,788
7,900	JAMES	950	7,698
7,934	MILLER	1,300	7,782

TXT Output.

*New_Rep_20210319100454478.txt - Notepad

File Edit Format View Help

```

7,839, KING 5,000
7,698 BLAKE 2,850 7,839
7,782 CLARK 2,450 7,839
7,566 JONES 2,975 7,839
7,788 SCOTT 3,000 7,566
7,902 FORD 3,000 7,566
7,369 SMITH 800 7,902
7,499 ALLEN 1,600 7,698
7,521 WARD 1,250 7,698
7,654 MARTIN 1,250 7,698
7,844 TURNER 1,500 7,698
7,876 ADAMS 1,100 7,788
7,900 JAMES 950 7,698
7,934 MILLER 1,300 7,782
    
```


Grouping in Publisher Report

Creating an Excel Template for Grouping

Steps to Create an Excel Template for Grouping

1. Open the **Excel Sheet**.
2. In the Excel sheet, enter the required **Columns** in the Header section as shown in the below figure.

Cust Name	Invoice	Sales
\${COL0}	\${COL1}	\${COL2}

3. To extract the column values under the required columns, enter the column numbers as \${COL0}, \${COL1}, and so on (highlighted as "2").

Cust Name	Invoice	Sales
\${COL0}	\${COL1}	\${COL2}

4. Now select the first two rows and group them under one band as "**Header**" in the **Name Manager** as shown in the figure below.

The screenshot shows an Excel spreadsheet with columns A through G. The first two rows of the table are highlighted in yellow. The first row contains 'Customer Name \${COL0}' and the second row contains 'Cust Name', 'Invoice', and 'Sales'. Below the table, the Name Manager dialog box is open, showing the formula '=Sheet1!\$A\$1:\$D\$2'.

Note:

- Band Name in the ORBIT Publisher Report must be the same as the band name mentioned in the template.


Performing Grouping on Publisher Report

Prior performing grouping in the Publisher Report in ORBIT and view the output in Excel, you must have the template ready with required filter.

For more information, see [Creating an Excel Template for Grouping](#)

1. Open a New report under the **Bands** section, **MainBand** appears. In the **MainBand**, right-click and then select **New Band** to create a new band.

E.g: New Band: **Header** its the same Name created in Excel Template.

2. On the **Header** band, click the drop down and select **New Query**. Drag and drop the required Business Objects in the columns in the  **Configurator** area.

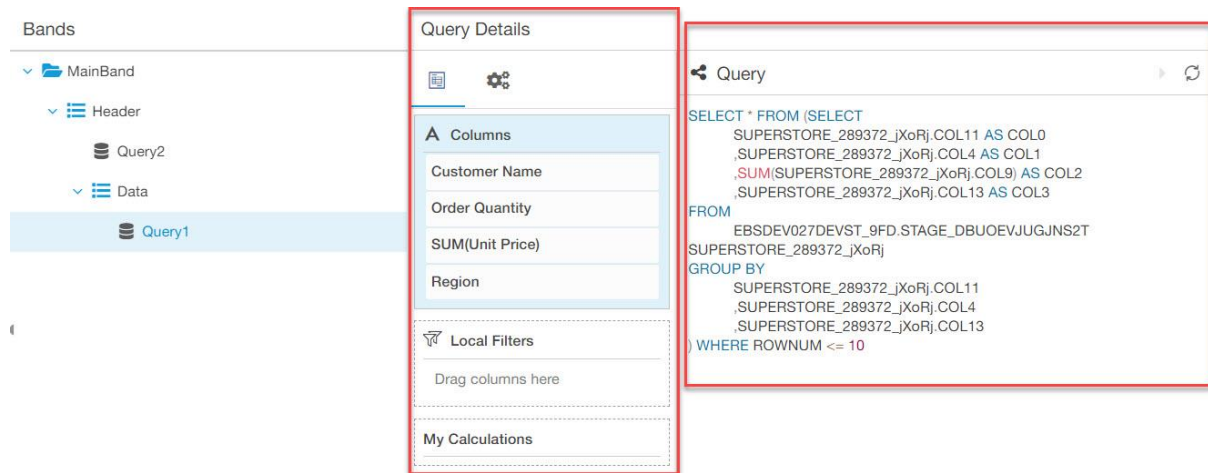
3. Create a **Data** Band to extract the data under **Header**. Since **Data** Band is needed for every group, place the **Data** band under **Header**

4. In the **Data** Band ,click the drop down and select **New Query**. A new query appears refer below figure.

Pract_html

Bands	Band Details
<div><div>▼ MainBand</div><div><div>▼ Header</div><div>Query2</div><div><div>▼ Data</div><div>Query1</div></div></div></div>	<div>Band Name: <input type="text" value="Data"/></div> <div>Orientation: <input type="text" value="Horizontal"/></div>

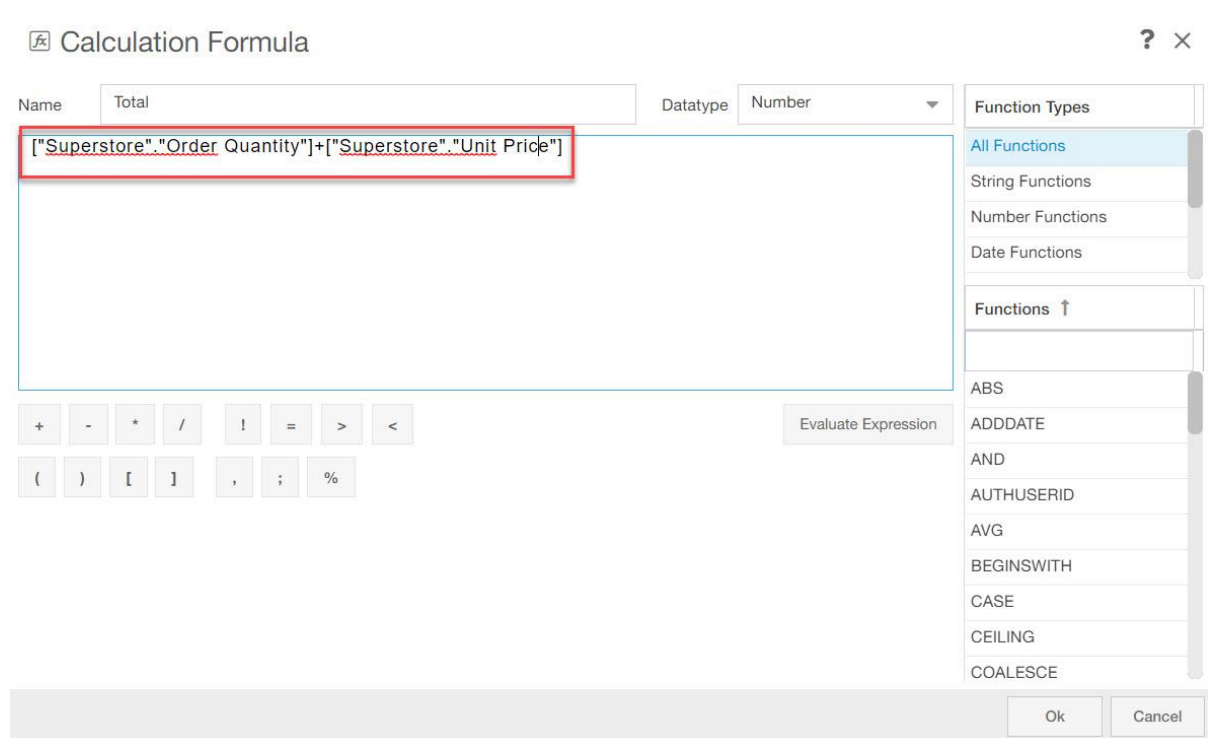
5. Select the Query **Query Details** and **Query** sections appear drag and drop the required Business Objects under columns automatically the Query is generated.



6. Drag the required Business Object in the Column (E.g: Region) in the **Local**

Filters and to build your own calculations click — click **New Calculation**

7. **Calculation Formula** dialogue box appears, mention the **Name** and build a formula as shown in the figure below. Click **OK**



8. Under the **Query Details** the Calculation built is dragged as shown in the figure below.

The screenshot shows the Query Editor interface. On the left, the 'Bands' pane shows a tree structure with 'MainBand' containing 'Header' and 'Data'. Under 'Header' is 'Query2', and under 'Data' is 'Query1'. The 'Query Details' pane on the right has three sections: 'Columns' with 'Customer Name', 'Order Quantity', 'Unit Price', 'SUM(Sales)', and 'Total' (highlighted with a red box); 'Local Filters' with a 'Drag columns here' instruction; and 'My Calculations' with 'Total' (also highlighted with a red box). The 'Query' SQL pane on the far right displays a SQL query with a GROUP BY clause and a WHERE clause: `SELECT * FROM (SELECT LT289372.COL11 AS COL0, LT289372.COL4 AS COL1, LT289372.COL9 AS COL2, SUM(LT289372.COL5) AS COL3, LT289372.COL9 + LT289372.COL4 AS COL4 FROM EBSDEV027DEVST_9FD.STAGE_DBUOEVIJUG.INS2T LT289372 GROUP BY LT289372.COL11, LT289372.COL4, LT289372.COL9, LT289372.COL9 + LT289372.COL4) WHERE ROWNUM <= 10`. The SQL pane is also highlighted with a red box.

Note: Since the grouping is done, add the **Local Filters** for the Query under **Header** as shown in the figure below.

The screenshot shows the Query Editor interface. On the left, the 'Bands' pane shows a tree structure with 'MainBand' containing 'Header' and 'Data'. Under 'Header' is 'Query2' (highlighted with a red box), and under 'Data' is 'Query4'. The 'Query Details' pane on the right has three sections: 'Columns' with 'Region' (highlighted with a red box); 'Local Filters' with a 'Drag columns here' instruction; and 'My Calculations' which is empty. The 'Query' SQL pane on the far right displays a SQL query: `SELECT * FROM (SELECT DISTINCT SUPERSTORE_22831_bqi0p.COL13 AS COL0 FROM EBSDEV027DEVST_9FD.STAGE_P84KYOQHRGITJ SUPERSTORE_22831_bqi0p) WHERE ROWNUM <= 10000`. The SQL pane is also highlighted with a red box.

9. Select the Query under **Data** band, and then select the **Local Filters** section under **Query Details**.

10. Drag and drop the required Business Object in the column of the Local Filters

click Edit. **E.g: Region**

Query Details

Columns

Customer Name

Order Quantity

Unit Price

SUM(Sales)

Total

Local Filters

Region

My Calculations

Total

Query

```

SELECT * FROM (SELECT
  LT289372.COL11 AS COL0
,LT289372.COL4 AS COL1
,LT289372.COL9 AS COL2
,SUM(LT289372.COL5) AS COL3
, LT289372.COL9 + LT289372.COL4 AS COL4
FROM
  EBSDEV027DEVST_9FD.STAGE_DBUOEJVJUGJNS2T LT289372
GROUP BY
  LT289372.COL11
,LT289372.COL4
,LT289372.COL9
, LT289372.COL9 + LT289372.COL4
) WHERE ROWNUM <= 10
        
```

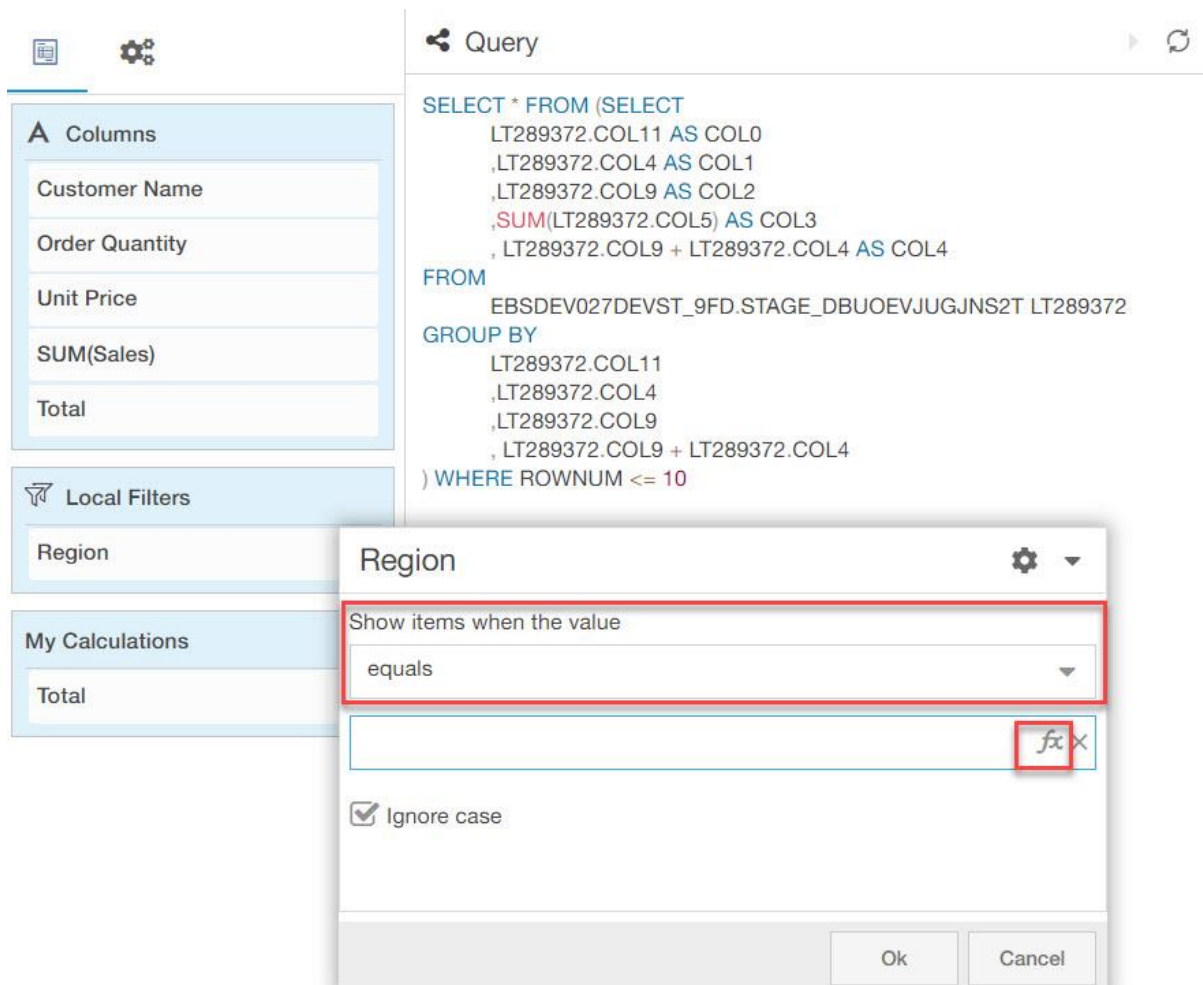
Region

Nothing selected

Ok

Cancel

For the required filter, click  as shown in the above figure



From the “**Show items when the value**” list, select the required option from the drop down. **E.g:** Equals

Under the list, in the textbox, enter the **Value** for the filter or **Choose Value**, click  as shown in the figure below and click **OK**

Choose Value

Static

Expression

Query

Value

Value

Use Reference

Ok

Cancel

Note: Valve: $\{Header.COL0\}$ Region column in the configurator area is at **COL0**

11. Save the report under appropriate folder, click **Save**.
12. Apply the Excel Template to the report See [Applying Excel Template for Publisher Report](#) for more details.

A	B	C	D
Customer Name Central			
Cust Name	Invoice	Sales	
Amy Hunt	3	3.29	
Amy Hunt	6	32.98	
Amy Hunt	7	19.98	
Amy Hunt	9	2.88	
Amy Hunt	10	34.76	
Amy Hunt	11	65.99	
Amy Hunt	15	30.93	
Amy Hunt	20	5.98	
Amy Hunt	21	419.19	
Amy Hunt	22	43.22	
Customer Name East			
Cust Name	Invoice	Sales	
Amy Cox	17	10.98	
Amy Cox	27	2.94	
Amy Cox	34	22.84	
Jim Epp	3	195.99	
Jim Epp	4	5.78	
Jim Epp	7	284.98	
Jim Epp	16	110.99	
Jim Epp	23	142.86	
Jim Epp	25	223.98	
Jim Epp	28	4.13	
Customer Name Mountain			
Cust Name	Invoice	Sales	
Amy Cox	2	9.99	

Note:

Grouping is possible only in Excel and HTML; grouping cannot be done in Word templates.

Template with Bind Variables

Template with Bind Variables

Bind Variables

Bind Variables are the dynamic variables that accept the inputs or the parameters at run time.

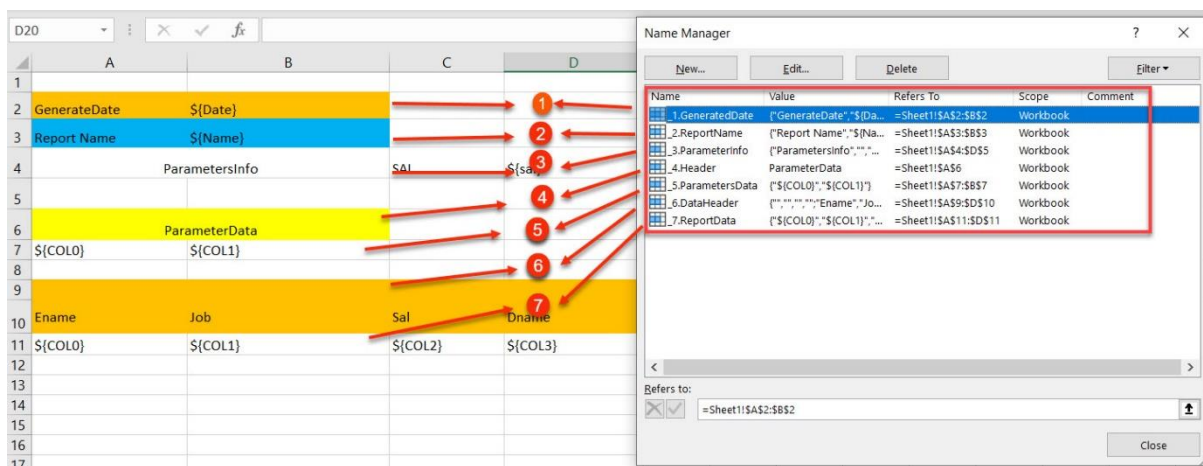
This section explains two types of templates with Bind Variables:

- [Excel Template with Bind Variables](#)
- [Word Template with Bind Variables](#)

Excel Template with Bind Variables

This section, explains about the Template with Bind Variables and how they are created.

The figure below displays various Bind variable with its Name and its associated Key values.



1 _1.GeneratedDate: Its associated key `${Date}` displays information about the **Date and Time** the report had Run.

2 _2.ReportName: Its associated key `${Name}` displays the Name of the report.

3 _3.ParametersInfo: Its associated key E.g. `${sal}` is set as a User Filter here.

4 _4.Header: The header for the ParametersData

5 _5.ParametersData: The User Filter data is displayed here column wise in `${COL0}`, `${COL1}`

6 _6.DataHeader: The field names for the contents in the reports (E.g. Ename, Job, Sal, Dname)

7 _7.ReportData: The Report data which is extracted gets displayed here.

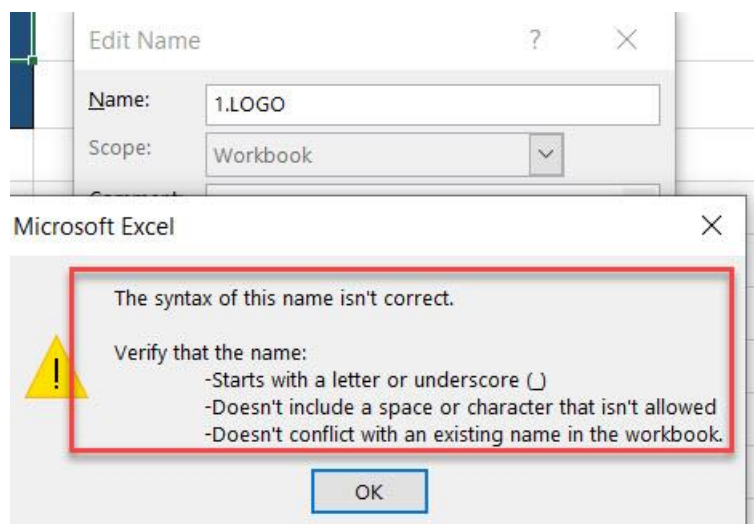
The **Names** mentioned in **Name Manager** field of Excel are the **Standard Notations** which the User cant change. Below is the List of **Standard Notations**

- GeneratedDate,
- ReportName,
- ParametersInfo,
- ParametersData,
- ReportData

If the user tries to change the Notations then the data wont be extracted from the reports

Note:

- We need to mention the Names as _1 or _2 so on to define the placing. Follow the rules mentioned below in the figure while defining a Name.
- Based on the notations given the data is extracted, the user has an option to customise the Template based on the Styles and while sequencing.



If the Notation (E.g. **\${Date}**) is changed to **\${Dates}** then the data cannot be extracted as shown in the figure below.

GenerateDate	
Report Name	Cust_new

If we mention the notations properly it provides the actual information as mentioned below.

GenerateDate	25 Mar 2021 08:30:13 AM
Report Name	Cust_new

The ParametersInfo Name is picked from the User Filter set in Publisher Report as **sal** as mentioned in below figure.

Filter -SAL

Label: SAL Aggregation: None ☐ Required Name: sal

☒ Select a range(In range, Not in range)

☐ Specify a condition

☐ No Condition

Default Value From: To: ☒ In range ☐ Not in range

Ok Cancel

For the ParameterData, the keys \${COL0} and \${COL1} are picked from column names under the Query as shown below:

Columns

ENAME

JOB

SAL

DNAME

Local Filters

Drag columns here

My Calculations

Query

```

SELECT * FROM (SELECT
  EMP_32946_uTVfJ.ENAME AS COL0
,EMP_32946_uTVfJ.JOB AS COL1
,EMP_32946_uTVfJ.SAL AS COL2
,DEPT_32955_PbKbU.DNAME AS COL3
FROM
  ORBIT_FD_STG.EMP EMP_32946_uTVfJ
,ORBIT_FD_STG.DEPT DEPT_32955_PbKbU
WHERE
  ( EMP_32946_uTVfJ.DEPTNO = DEPT_32955_PbKbU.DEPTNO )
) WHERE ROWNUM <= 10000

```

Publishre report_updated doc

The Excel Output is displayed as below.

GenerateDate		25 Mar 2021 08:30:13 AM			
Report Name		Cust_new			
ParametersInfo			SAL		
ParameterData					
SUM(SAL)	between 1500 and 3500				
Ename	Job	Sal	Dname		
BLAKE	MANAGER	2850	SALES		
FORD	ANALYST	3000	RESEARCH		
CLARK	MANAGER	2450.1	ACCOUNTING		
ALLEN	SALESMAN	1600	SALES		
TURNER	SALESMAN	1500	SALES		
SCOTT	ANALYST	3000.23	RESEARCH		
JONES	MANAGER	2975	RESEARCH		

Word Template with Bind Variables

This page discusses about creating a Word Template with Bind variables. The figure below displays various bind variable with its **Band Name** and its associated **Key values**.

Parameter info: \${ParameterInfo.state}	
GeneratedDate info: \${GeneratedDate.Date}	
##band=GeneratedDate DATE	
\${Date}	
##band=ParametersData PARAMETERS DATA	
\${COLO}	\${COL1}

In the Word Template, the **Parameter information: \${Parameterinfo.state}** is defined using **\${BandName.Key}** notation.

ParameterInfo is the Band name and **state** is the Key. Also, the **GeneratedDate** is the Band name and **Date** is the Key

The key in the **Parameterinfo** is picked from the **Name** of the selected User Filter. Here, the User Filter in the Publisher Report is State, and its **Name** is state as shown in the figure below.

Filter -State

Label: State Required Name: state

☒ Select from list(Includes, Excludes)

☐ Match a specific string(Contains, Does not contain)

☐ Specify a condition

☐ No Condition

☐ Skip validation while searching

— List of values configuration —

Ok Cancel

For the **ParameterData**, the keys \${COL0} and \${COL1} are picked from column names under the Query as shown below:

The screenshot shows a query editor interface. On the left, there is a 'Columns' panel with a list of columns: ENAME, JOB, SAL, and DNAME. Below this is a 'Local Filters' section with a placeholder 'Drag columns here' and a 'My Calculations' section. On the right, the 'Query' panel displays a SQL query. The query is as follows:

```
SELECT * FROM (SELECT
    EMP_32946_uTVfJ.ENAME AS COL0
    ,EMP_32946_uTVfJ.JOB AS COL1
    ,EMP_32946_uTVfJ.SAL AS COL2
    ,DEPT_32955_PbKbU.DNAME AS COL3
FROM
    ORBIT_FD_STG.EMP EMP_32946_uTVfJ
    ,ORBIT_FD_STG.DEPT DEPT_32955_PbKbU
WHERE
    ( EMP_32946_uTVfJ.DEPTNO = DEPT_32955_PbKbU.DEPTNO )
) WHERE ROWNUM <= 10000
```

In the query, the column names 'COL0' and 'COL1' are highlighted with red boxes, indicating they are the keys for the ParameterData.

The output for the above Word Template is displayed below:

Parameter info: is in list California , Illinois

GeneratedDate info: 23 Mar 2021 04:05:15 AM

DATE
23 Mar 2021 04:05:15 AM

PARAMETERS DATA	
State	is in list California , Illinois

Best Practice

- It is recommended to create a publish report with the required columns prior to uploading the excel/word template using **Templates** option.

- Once the template is uploaded, switch to **View Mode** and then view the output. See [Viewing the Output](#) for more information.

Creating a Word Template with Grouping and Page Break

Creating a Word Template with Grouping and Page Break

Create a Word template in the following format:

##band=ParentTable.TG.PBR			
State=\${COL0}			
##band=ChildTable CITY	SALES	DISCOUNT	PROFIT
\${COL0}	\${COL1}	\${COL2}	\${COL3}

The above template illustrates that the ParentTable consisting of four rows.

The first three rows form the Heading and the fourth row forms the Data row.

- First Row: **##band=<BandName><dot><TG><dot><PBR>**
 - o Where band_name = ParentTable
 - o TG = Table Grouping (this implies that the table has a child table)
 - o PBR= This implies that there should be a page break between the tables
- Second Row: **\${COL0}**
- Third Row: **##band=ChildTable**
- Fourth Row (the data row): **\${COL0}**, **\${COL1}**, **\${COL2}**, and **\${COL3}**

Once the table is created, apply **Repeat Header Rows** option to display header in every page.

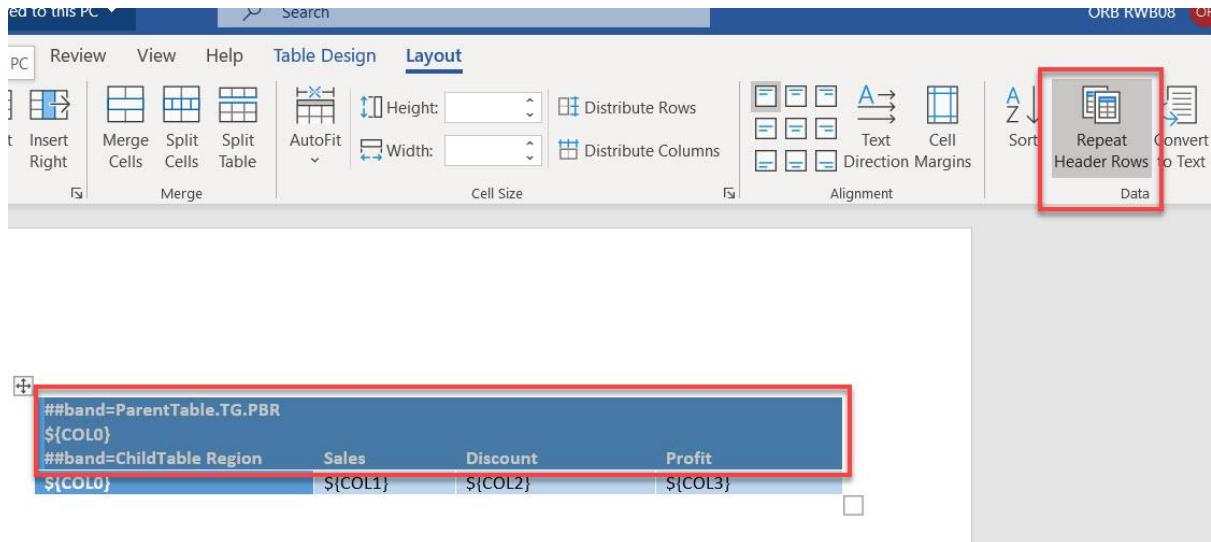
To view the outputs and scenarios without Repeat Header Rows.

- [Applying Repeat Header Rows Option](#)
- [Without Repeat Header Rows Option](#)

Applying Repeat Header Rows Option

To apply the Repeat Header Rows in the Word template, perform the following:

1. Select the table and on the **Layout** menu, in the **Data** group, click **Repeat Header Rows**



When **Repeat Header Rows** is selected, it appears grayed as in the above figure and **Header** (the first three rows of the table) gets repeated for every page.

The output appears as displayed below:

Arizona			
Region	Sales	Discount	Profit
Mountain	3.63	.03	-1.56
Mountain	3.77	.09	-1.84
Mountain	4.94	.10	-1.76
Mountain	5.68	.02	-1.82
Mountain	5.70	.10	-2.34
Mountain	6.75	.08	-2.31
Mountain	8.34	.09	-3.44
Mountain	8.60	.09	-2.03
Mountain	8.87	.03	-6.79
Mountain	9.25	.01	-4.21
Mountain	10.33	.04	-3.86
Mountain	10.43	.07	-4.72
Mountain	11.01	.09	-1.42
Mountain	11.87	.04	-8.89
Mountain	12.11	.02	-.98
Mountain	12.74	.05	-11.39
Mountain	13.04	.06	-6.62
Mountain	13.44	.08	-8.88
Mountain	13.53	.07	-6.73
Mountain	13.96	.06	-4.70
Mountain	14.39	.07	-10.24
Mountain	14.49	.09	-12.58
Mountain	14.75	.03	-2.49
Mountain	14.75	.07	-11.42
Mountain	14.85	.05	-2.79
Mountain	14.96	.02	-.03
Mountain	15.69	.09	-1.59
Mountain	15.81	.06	-9.88
Mountain	15.87	.01	2.53
Mountain	16.08	.04	-3.75



California			
Region	Sales	Discount	Profit
West	15.00	.10	-13.74
West	72.00	.04	-108.08
West	80.00	.03	10.96
West	1,100.00	.07	-240.31
West	3.20	.09	-3.16
West	3.23	.06	-2.73

In the above figure, applying Table Grouping retrieves the data state-wise. Also, since the page break is applied in the word template, the data of Arizona state appears in a new page instead of tailing the data of California state.

And, as the Repeat Header Rows option is selected, the Header appears in every page when the data continues to next page.

The following are the other different scenarios which have **Repeat Header Rows** option selected in the templates.

Scenario 1: When Table Grouping is applied but there is no Page break

In this scenario, there is no Page break applied; however, Table Grouping is applied.

The output for the above scenario is displayed below:

Arizona			
Region	Sales	Discount	Profit
Mountain	3.63	.03	-1.56
Mountain	3.77	.09	-1.84
Mountain	4.94	.10	-1.76
Mountain	5.68	.02	-1.82
Mountain	5.70	.10	-2.34
Mountain	6.75	.08	-2.31
Mountain	8.34	.09	-3.44
Mountain	8.60	.09	-2.03
Mountain	8.87	.03	-6.79
Mountain	9.25	.01	-4.21
Mountain	10.33	.04	-3.86
Mountain	10.43	.07	-4.72
Mountain	11.01	.09	-1.42
Mountain	11.87	.04	-8.89
Mountain	12.11	.02	-.98
Mountain	12.74	.05	-11.39
Mountain	13.04	.06	-6.62
Mountain	13.44	.08	-8.88
Mountain	13.53	.07	-6.73
Mountain	13.96	.06	-4.70
Mountain	14.39	.07	-10.24
Mountain	14.49	.09	-12.58
Mountain	14.75	.03	-2.49
Mountain	14.75	.07	-11.42
Mountain	14.85	.05	-2.79
Mountain	14.96	.02	-.03
Mountain	15.69	.09	-1.59
Mountain	15.81	.06	-9.88
Mountain	15.87	.01	2.53
Mountain	16.08	.04	-3.75

California			
Region	Sales	Discount	Profit
West	15.00	.10	-13.74
West	72.00	.04	-108.08
West	80.00	.03	10.96
West	1,100.00	.07	-240.31
West	3.20	.09	-3.16
West	3.23	.06	-2.73
West	3.42	.05	-2.91
West	3.96	.10	-1.72
West	6.34	.08	-4.44
West	6.76	.02	-4.28

West	6.93	.01	-4.64
West	7.01	.03	-4.20
West	7.75	.03	-5.27
West	7.96	.00	-.11
West	7.98	.04	-3.93
West	8.48	.10	-7.90
West	9.70	.02	-18.03
West	10.14	.04	-7.61
West	10.17	.02	-4.09
West	10.23	.10	-4.22
West	10.39	.02	-7.97
West	10.39	.10	-3.24
West	10.48	.02	-5.65
West	10.58	.05	-11.58
West	11.08	.06	-8.93
West	11.08	.09	-9.69
West	11.15	.07	-2.62

In the above figure, since no page break is applied in the word template, the data of Arizona state is followed by the data of California state in the same page. Also, as the Repeat Header Rows option is selected, the Header appears in every page when the data continues to next page.

Scenario 2: No Table Grouping and No Page Break

In this scenario, no Table Grouping and no Page Break are applied.

The output for the above scenario is displayed below:

Arizona			
California			
Georgia			
Illinois			
Massachusetts			
New Jersey			
New York			
Newfoundland			
Oregon			
Texas			
Washington			
##band=ChildTable Region	Sales	Discount	Profit
\${COL0}	\${COL1}	\${COL2}	\${COL3}

When no Table Grouping or no Page Break is applied, then it's a normal table.

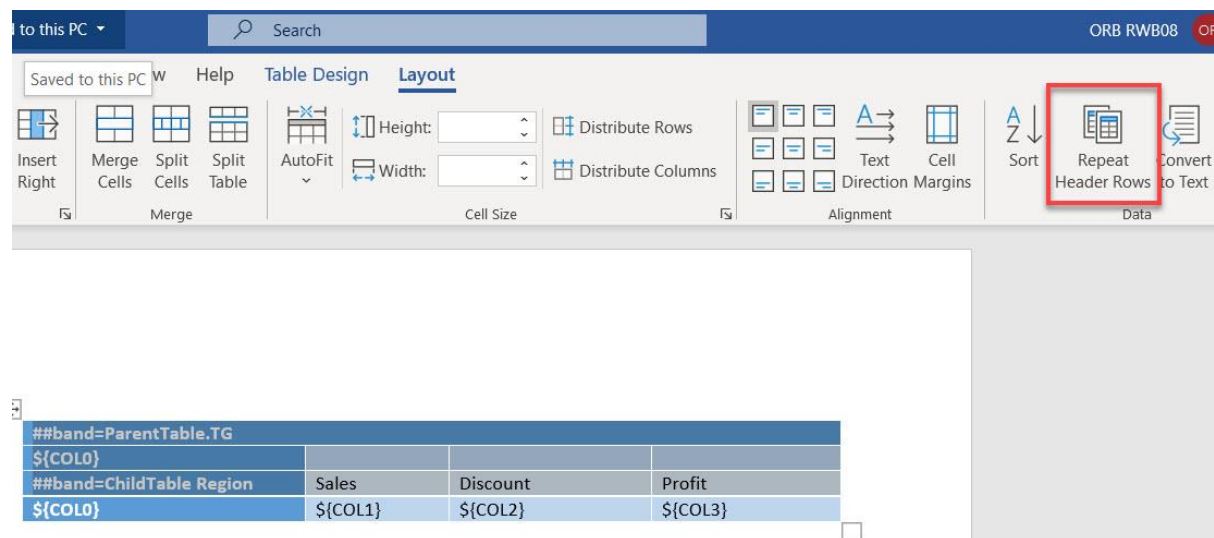
Without Repeat Header Rows Option

The below scenario displays the output where “Repeat Header Rows” option is not applied.

Scenario1:

When **Repeat Header Rows** option is not selected in Microsoft Word; however, Table Grouping and Page break is applied in the template.

Repeat Header Rows appears in the **Layout** menu in Microsoft Word as shown in the figure below.



Output:

The figure below illustrates the output of the above template, where the header is not repeated in the second page.

Table Grouping is done State-wise, hence, the data from different states (Arizona and California) is displayed below.

In the figure below, the data for the state California ends in the second page but the Headers are not repeated.

Arizona			
Region	Sales	Discount	Profit
Mountain	3.63	.03	-1.56
Mountain	3.77	.09	-1.84
Mountain	4.94	.10	-1.76
Mountain	5.68	.02	-1.82
Mountain	5.70	.10	-2.34
Mountain	6.75	.08	-2.31
Mountain	8.34	.09	-3.44
Mountain	8.60	.09	-2.03
Mountain	8.87	.03	-6.79
Mountain	9.25	.01	-4.21
Mountain	10.33	.04	-3.86
Mountain	10.43	.07	-4.72
Mountain	11.01	.09	-1.42
Mountain	11.87	.04	-8.89
Mountain	12.11	.02	-.98
Mountain	12.74	.05	-11.39
Mountain	13.04	.06	-6.62
Mountain	13.44	.08	-8.88
Mountain	13.53	.07	-6.73
Mountain	13.96	.06	-4.70
Mountain	14.39	.07	-10.24
Mountain	14.49	.09	-12.58
Mountain	14.75	.03	-2.49
Mountain	14.75	.07	-11.42
Mountain	14.85	.05	-2.79
Mountain	14.96	.02	-.03
Mountain	15.69	.09	-1.59
Mountain	15.81	.06	-9.88
Mountain	15.87	.01	2.53
Mountain	16.08	.04	-3.75

California			
Region	Sales	Discount	Profit
West	15.00	.10	-13.74
West	72.00	.04	-108.08
West	80.00	.03	10.96
West	1,100.00	.07	-240.31
West	3.20	.09	-3.16
West	3.23	.06	-2.73
West	3.42	.05	-2.91
West	3.96	.10	-1.72
West	6.34	.08	-4.44

West	6.76	.02	-4.28
West	6.93	.01	-4.64
West	7.01	.03	4.30

When no Table Grouping or no Page Break is applied, then it's a normal table and the output is similar to Scenario 2 in the above section.

Applying Word Template to Publisher Report

1. Create a New Publisher Report.
2. In the **Bands** section, under **MainBand**, create a band "ParentTable".

Bands

▼ MainBand

▼ ParentTable

Query2

▼ ChildTable

Query4

Query Details

Columns

##band=ParentTable.TG.PBR			
State=\${COL0}			
##band=ChildTable CITY	SALES	DISCOUNT	PROFIT
\${COL0}	\${COL1}	\${COL2}	\${COL3}

- As shown in the above figure, the band "ParentTable" in publisher report maps to the band "ParentTable" in the Word template (highlighted as "1").
- Also, the child band "ChildTable" in publisher report maps to the band "ChildTable" in the Word template (highlighted as "2").

Note: One child band cannot have another child band under it.

3. Right-click "ParentTable" band, and then click **New Query** to create a new query "Query 2".
 - When "Query 2" is selected, **Query Details** section appears.
4. Drag and drop the required columns from business object area to the **Columns** section under **Configurator** tab.

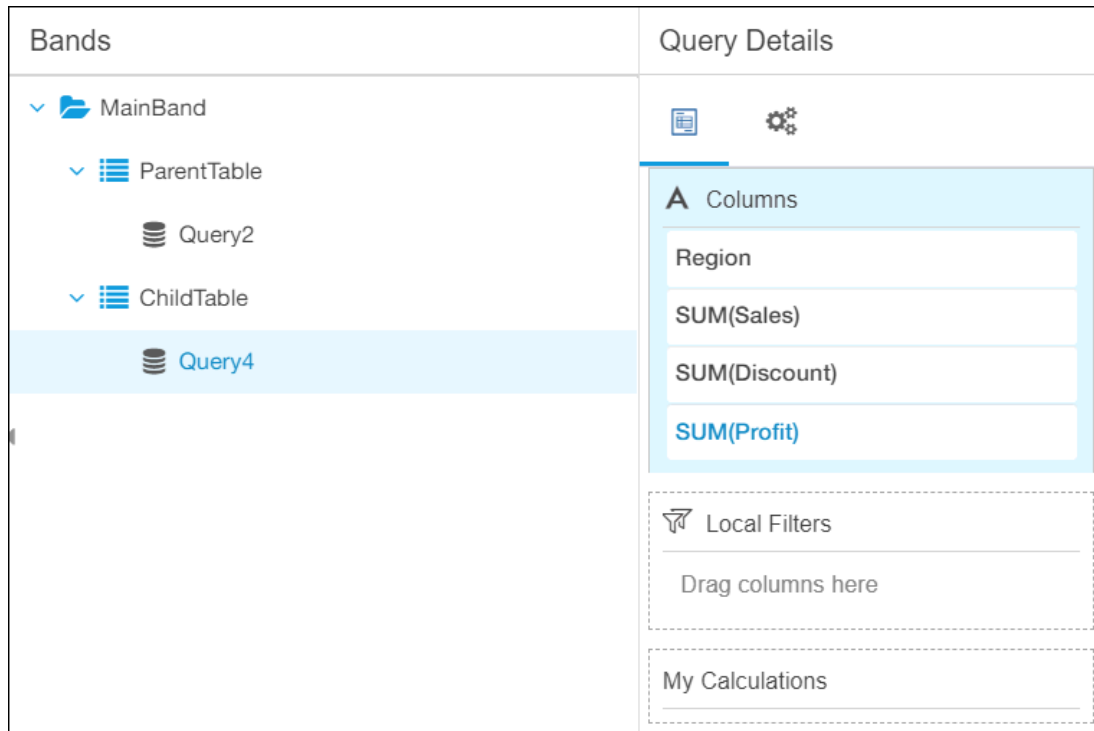
Bands	Query Details
<div> <div>MainBand</div> <div> <div>ParentTable</div> <div>Query2</div> <div>ChildTable</div> <div>Query4</div> </div> </div>	<div> <div>Columns</div> <div> <div>State</div> <div>SUM(Sales)</div> </div> <div> <div>Local Filters</div> <div>Drag columns here</div> </div> <div> <div>My Calculations</div> </div> </div>

5. Right-click the "ParentTable" band, and then click **New Band** to create a child band "ChildTable".

6. Right-click the Child Table, and then click **New Query**, “Query 4”.

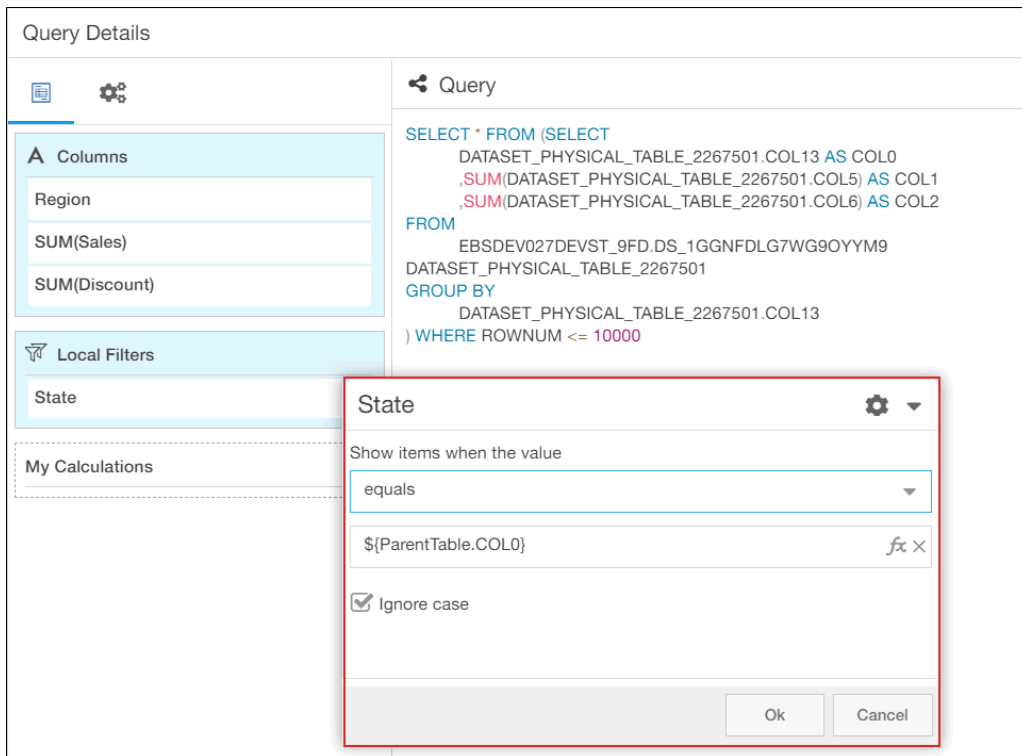
- Here, the Parent and Child bands are created to enable grouping.
- When “Query 4” is selected, **Query Details** section appears.

7. Drag and drop the required columns from business object area to the **Configurator** tab in the **Query Details** section.



8. In the **Local Filters** section, drag the required column and set the filter. Refer **Local Filters**.

- **Example:** Required Column: State
- **Example:** Required Condition: equals
- **Example:** Local Filter: `${ParentTable.COL0}`



9. To save the changes, click **Save**.

Once the publisher report supporting grouping is created, then upload the word templates mentioned above using **Templates** option. See [Applying Word Template to Publisher Reports](#) for more information

To view the output, see *Viewing Publisher Report in Word* for more information.

Viewing the Output

To view the output

1. Switch to **View Mode** from **Edit Mode**.
2. In the **View Mode**, from the available templates (highlighted as “1”), select the required template.
3. From the **Select Output** box, select the required output, and then click **Run**.

FTL_report	HTMLTemp	HTML	Run
STATE	SALES	PRICE	
Arizona	3,063,212.6	138,535.22	
California	4,190,854.05	230,693.35	
Georgia	817,729.37	35,915.15	
Illinois	1,372,713.08	64,226.94	
Massachusetts	684,211.51	35,688.07	
New Jersey	409,383.25	19,588.44	
New York	116,376.47	6,021.35	
Newfoundland	102,924.07	4,648.06	
Oregon	1,892,757.84	98,076.58	
Texas	1,464,455.8	77,428.77	
Washington	800,847.35	39,597.3	

4. The output gets downloaded as HTML and TXT.
5. To view different output scenarios, refer to [Creating a Word Template with Grouping and Page Break.](#)
6. The process of viewing Excel or HTML outputs is same as this process.

Options


Options

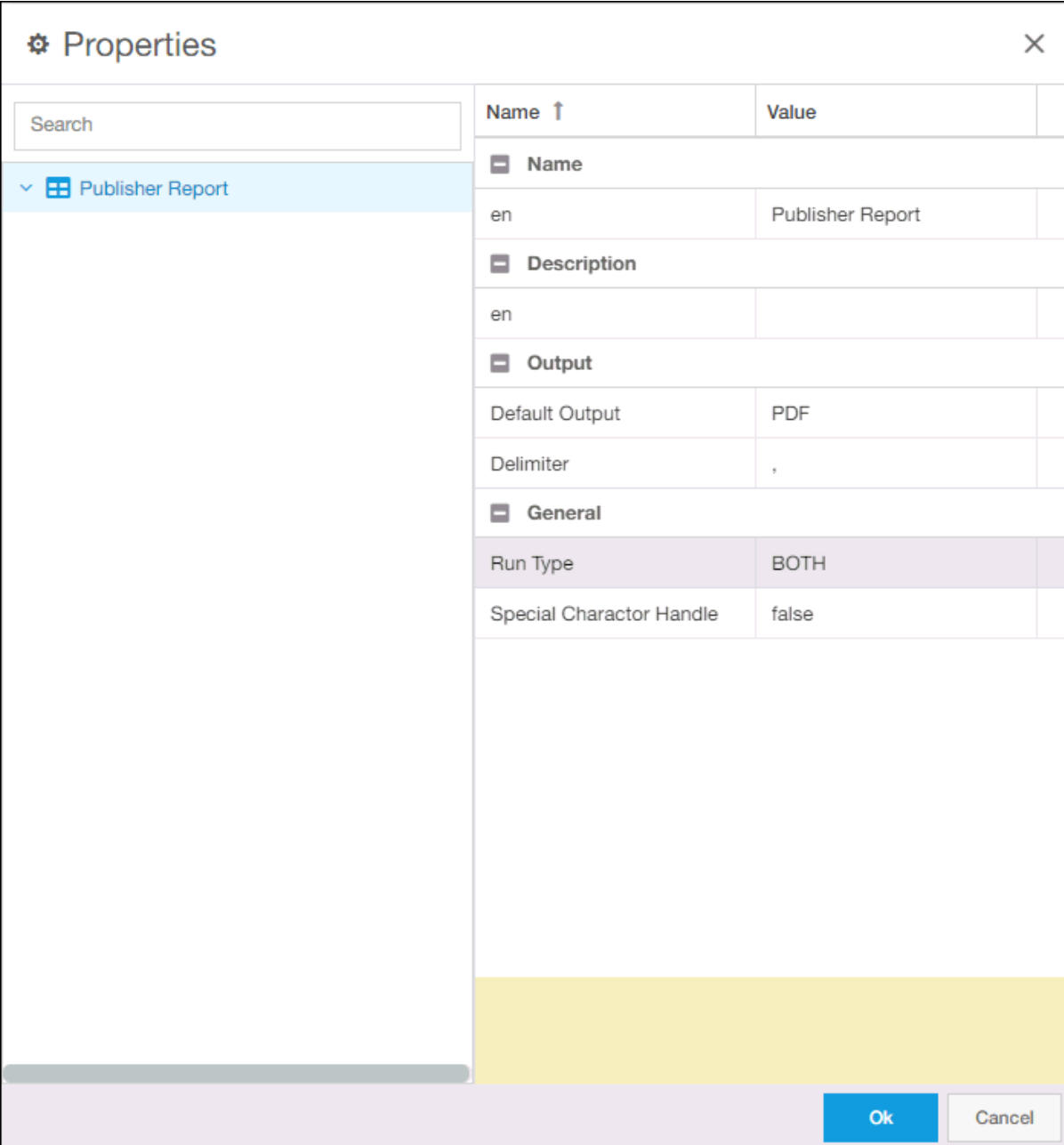
Options provides the following:

- [Properties](#)
- [Templates](#)
- [Generate Link](#)
- [Delivery Plans](#)

Properties

To set the properties of a Publisher Report

1. On the right-hand side corner, click  **Options**, and then click **Properties**.
2. **Properties** dialog appears.



The Properties dialog box for a Publisher Report. It features a search bar on the left, a list of properties on the right, and a bottom bar with Ok and Cancel buttons. The properties are organized into sections: Name, Description, Output, and General.

Name ↑	Value
Name	
en	Publisher Report
Description	
en	
Output	
Default Output	PDF
Delimiter	,
General	
Run Type	BOTH
Special Charactor Handle	false

3. In the **Properties** dialog, perform the following:
 - In the **Name** box, type the name of the report.
 - In the **Description** box, type the description of the report.
 - Under **Output** section , the following options appears:

i. **Default Output**

- This option have the following output types

a. **Image**

b. **HTML**

c. **PDF**

Note: The selected default output appears in report schedule window.

i. **Delimiter**

- For more information refer [Delimiter Text](#)

- Under **General** section, the following options appears:

i. **Run Type**

2. **Schedule Only** -This options enables only to schedule the report.

3. **Run & Schedule (BOTH)**-This option enables to run and schedule the report.

- In **Special Character Handle** list, click one of the following option:

- **false**


- **true**

4. To save the changes, click **Ok**.

Publishre report_updated doc

Templates

To Upload a New Template

1. On the right-hand side, click  **Options**, and then click **Templates** (highlighted as "1").
2. Templates box appears.

Templates

Name	Short Name	Description	Type	Default Output	Download	Default	Actions

New Template

2

Close

Refer [Apply Excel Template to Publish Report](#)

Generate Link PR

The Generate Link option is similar for all the Reports mentioned below.

- Data Reports
- Analysis
- Dashboards
- Publisher Reports
- Script Reports.

For more information see [Generating Report Link](#)

Delivery Plans

The Delivery plans for publisher reports is same as Data Reports. See Delivery Plans for more information.

For a **Publisher Report**, the **Report Mapping Fields** are considered from the first band, first query columns.