

Getting Started with Oracle Business Intelligence Publisher

Purpose

This tutorial mainly covers how to get started with Oracle Business Intelligence Publisher, and how to create highly formatted reports using BI Publisher based not only on conventional data sources (such as Oracle Database) but also on various other data sources (such as Web Services, RSS feeds, and so on). It also covers how to create reports with parameters and list of values (LOVs). Because BI Publisher is integrated with Oracle Business Intelligence Enterprise Edition, you will learn how to create reports based on Oracle BI subject area and Oracle BI Answers request. You will also learn how to create RTF templates in MS Word by connecting to BI Publisher, and publish these templates for the reports to view data in BI Publisher. You will learn to configure the BI Publisher scheduler to schedule reports and view the saved data.

Time to Complete

Approximately 1 hour

Topics

This tutorial covers the following topics:

- ☑ [Overview](#)
- ☑ [Scenario](#)
- ☑ [Prerequisites](#)
- ☑ **Getting Started**
 - **Logging In to Oracle BI Publisher**
 - **Setting Preferences**
- ☑ **Creating a BI Publisher Report Based on Oracle Database**
- ☑ **Creating Report Layouts Using BI Publisher Desktop (Template Builder) in MS Word**
 - **Creating an RTF Template with a Table and a Chart**
 - **Publishing the Template for a BI Publisher Report**
 - **Formatting Template Using MS Word Native Features**
 - **Creating and Publishing Multiple Templates for a Report**
 - **Viewing Report Data in BI Publisher Using Templates**
- ☑ **Creating a Report with Parameters and List of Values**
- ☑ **Scheduling BI Publisher Reports**
 - **Configuring the BI Publisher Scheduler**
 - **Scheduling and Viewing Saved Output**

Overview

Oracle BI Publisher (formerly known as XML Publisher) is a revolutionary reporting and document output management solution from Oracle. Oracle BI Publisher report formats can be designed using Microsoft Word or Adobe Acrobat, the tools that are easy to use, and most users are already familiar with. Oracle BI Publisher also allows you to create reports from multiple data sources.

Oracle BI Publisher can be used as a stand-alone reporting product or integrated with the Oracle Business Intelligence Suite Enterprise Edition. You will start by logging in to BI Publisher and create reports from various data sources, such as Oracle Database, Web services, RSS feeds, and Files. You will also create parameterized report that uses LOVs.

Because BI Publisher is integrated with Oracle BI Enterprise Edition, you can also create the BI publisher reports based on Oracle BI Answers request, and also based on Oracle BI Server subject area. However, these topics are briefly discussed in this tutorial. For more details, you can refer to the OBE titled "[Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2.](#)"

Also, you will be guided through the steps to create and publish RTF templates in MS Word by connecting to BI Publisher. You will also schedule the report, and view the saved data.

[Back to Topic List](#)

Scenario

You will be using various data sets for this OBE. For example, you will create a simple employee salary report based on the human resources (HR) sample schema of the Oracle Database. For the File data set, you will use the demo files and templates that are provided with BI Publisher. For the BI Answers request and BI Server subject area, SH.rpd is used, which is based on the SH schema of the database, and so on.

To continue with the steps listed in the topics, you should have installed the required software and performed the other setup as mentioned in the following topic, Prerequisites.

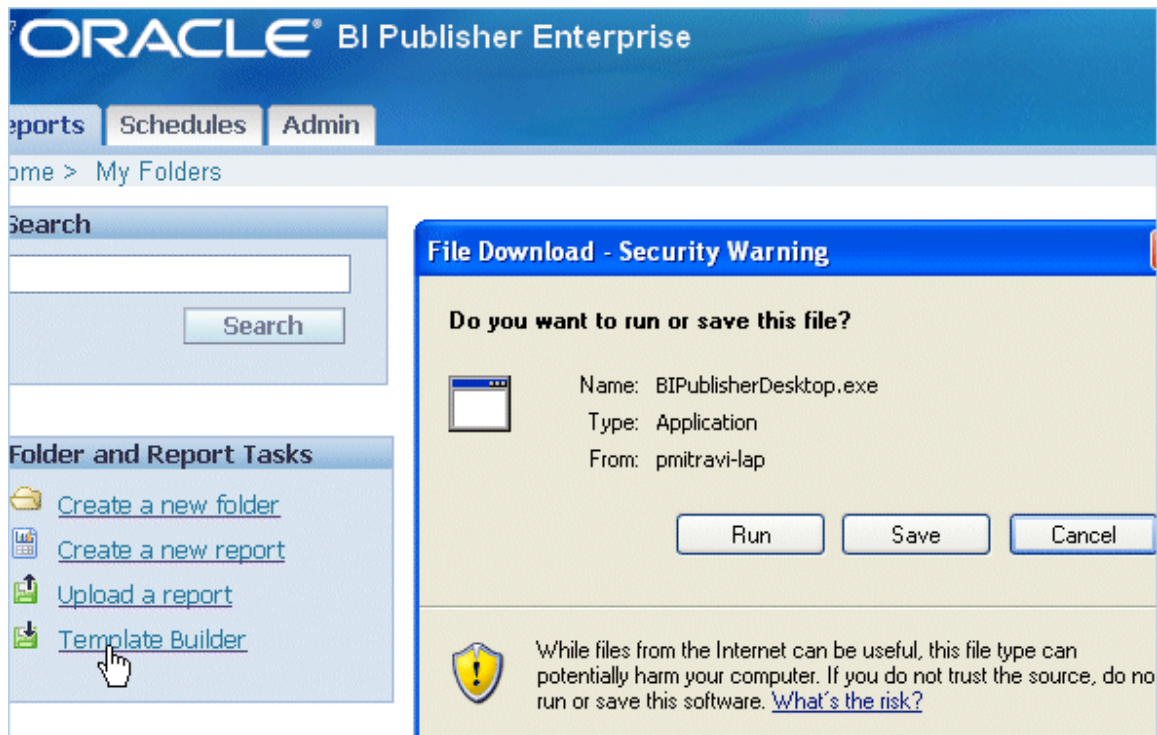
[Back to Topic List](#)

Prerequisites

Before starting this tutorial, you should:

1. Have access to or have installed Oracle Database 10g (preferably version 10.2)
2. Have access to or have installed the sample schemas (HR, OE, and SH specifically)
3. Have access to or have installed Oracle BI Publisher and Oracle BI Publisher Desktop 10.1.3.2.

You can install BI Publisher Desktop by clicking the **Template Builder** link in BI Publisher:



When you have successfully installed BI Publisher Desktop, the BI Publisher menu and BI Publisher toolbars are displayed in MS Word.

Note: Oracle BI Publisher Desktop was formerly known as Template Builder, and is mainly used for building the RTF templates for BI Publisher reports in MS Word.

4. Have created a user for installing the BI Publisher scheduler schema tables by performing the following:

Create a BIPSchd user with the required privileges in the database by logging in to SQL* Plus as the sys or system user:

```
SQL> create user bipsched identified by bipsched
      default tablespace users
      temporary tablespace temp
      quota unlimited on users;
```

```
SQL> grant connect, resource to bipsched;
```

Note: The name of the user can be any appropriate name.

5. Have set up the proxy parameters (to avoid any firewall problems with the Web Services and RSS data set reports) in the xmlpserverstart.bat file or the oc4j.cmd file as per your installation. Modify the following line, which defines JAVA_HOME. (Observe the proxy parameters in bold.):

- "%JAVA_HOME%\bin\java" %JVMARGS% -jar -Dhttp.proxyHost= <myproxy.mycompany.com> -

Dhttp.proxyPort=<Port> "%OC4J_JAR%" %CMDARGS%

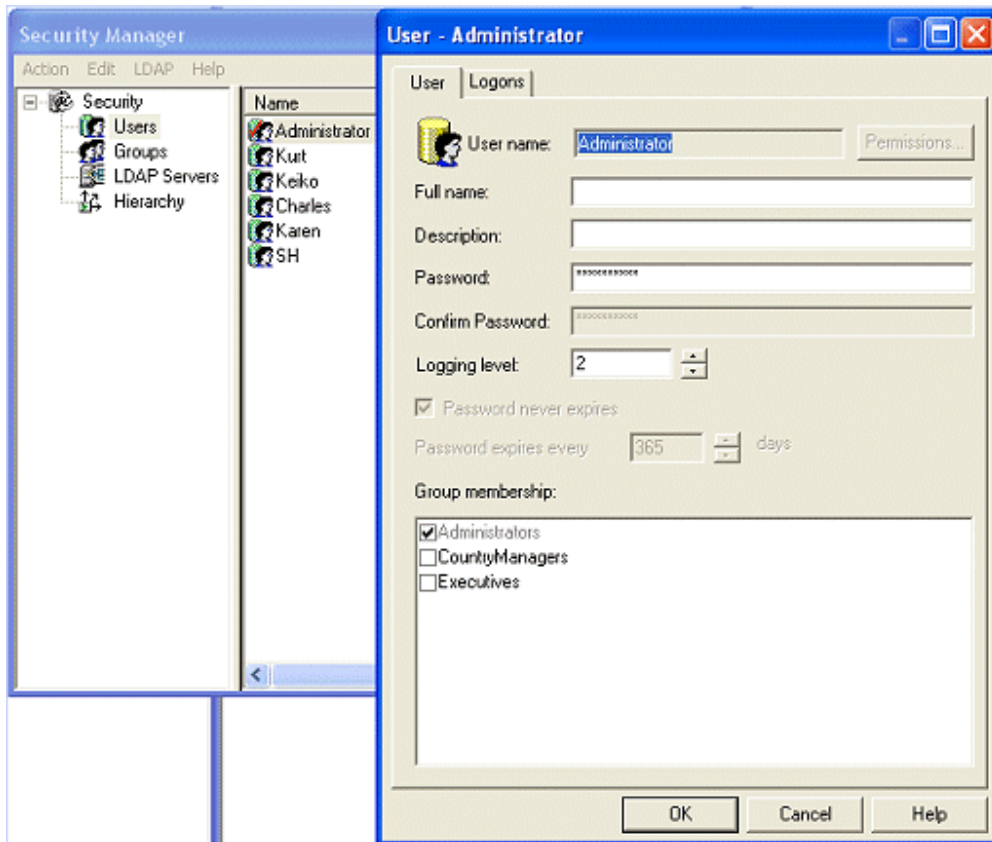
- Restart xmlpserver or oc4j as the case may be.

If you want to create reports based on Oracle BI Answers request and Oracle BI Server subject area, then you should also:

1. Have access to or have installed Oracle BI EE 10.1.3.2 including Oracle BI Publisher and Oracle BI Publisher Desktop 10.1.3.2.

You can follow the instructions as listed in the OBE "[Installing the Oracle Business Intelligence Suite Enterprise Edition on Windows.](#)"

2. Have created an ODBC connection to the Oracle Database, and set up the SH.rpd metadata repository by following the steps listed in the OBE "[Creating Interactive Dashboards and Using Oracle Business Intelligence Answers.](#)" Also, it is strongly recommended that you go through this tutorial to know the steps involved in creating an Answers request, creating a dashboard page, and so on.
3. Have set up the integration between BI Publisher and Oracle BI EE.
If you have included BI Publisher Enterprise, when you installed Oracle BI Enterprise Edition, then Oracle BI installer will set up the integration with the Presentation Services, by setting host name, port, and URL values. However, you need to set the Administrator password from the BI Administration tool as follows:
 1. Select All Programs > Oracle Business Intelligence > BI Administration.
 2. Select Open > Online. (To open SH.rpd online, enter Administrator as User name and leave the Password field blank.)
 3. Select Manage > Security > Users > Administrator, and check out the Administrator user.
 4. In the properties, set the password for the Administrator user and click OK.



If the Integration with Presentation Services is not set up at the time of Oracle BI EE installation, you can also set up this integration from BI Publisher as follows:

1. From the Admin page, under Integration, select Oracle BI Presentation Services.
2. Enter the following information about your BI Presentation Services server:
 - Server Protocol – Select http or https
 - Server Version – Select v4
 - Server – Enter the server host name (for example, server01.mycompany.com)
 - Port for the server – The default port is 9704.
 - Administrator Username and Password
 - URL Suffix – The default value is analytics/saw.dll.

ORACLE® BI Publisher Enterprise

Welcome, administrator Preferences

Reports Schedules Admin

Admin > Oracle BI Presentation Services

Integration

Oracle BI Presentation Services

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

Cancel Apply

Server Protocol http

Server Version v4

* Server PMITRAVI-LAP

* Port 9704

* Administrator Username Administrator

Administrator Password

URL Suffix analytics/saw.dll
(Default Value: analytics/saw.dll)

Session Timeout (Minutes) 90

[Back to Topic List](#)

Getting Started

For getting started with BI Publisher, perform the steps listed in each of the following subtopics:

- ☒ [Logging In to Oracle BI Publisher](#)
- ☒ [Setting Preferences](#)

[Back to Topic List](#)

Logging In to Oracle BI Publisher:

To log in to BI Publisher, perform the following steps:

1. Enter the URL for BI Publisher in a browser window which is of the format:
http://<hostname>:<port>/xmlpserver/ (for example, http://localhost:9704/xmlpserver/)

The Log In screen for the BI Publisher appears. Enter **Administrator** as the **Username** and **Password**. Click **Sign In**.



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Username Administrator

Please contact administrator for your username/password.

Password

Sign In

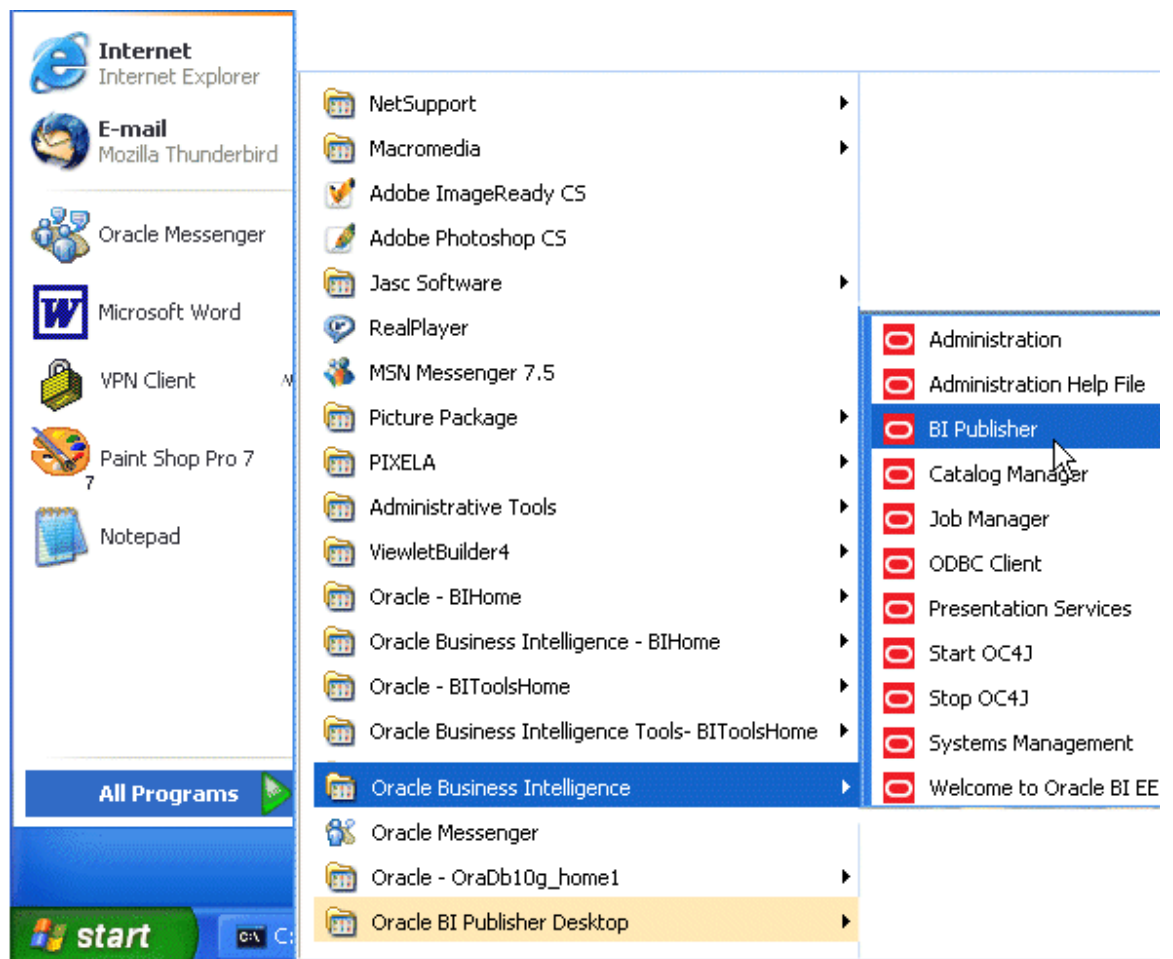
☐ Accessibility Mode

English

Note: Ensure that you have the correct password for the Administrator user in BI Publisher, else you may face problems in logging in to BI Publisher.

Also, on Windows, depending on the type of installation you have done, you can invoke BI Publisher as follows:

- If you have installed BI Publisher along with Oracle BI Enterprise Edition, then you can select **All Programs > Oracle Business Intelligence > BI Publisher** from the **Start** menu.



- If you have installed BI Publisher in stand-alone mode, then select **All Programs > Oracle - OracleHome > BI Publisher Server** from the **Start** menu.
OracleHome - refers to Oracle Home name, where you installed Oracle BI Publisher.

2. This displays the Welcome screen for BI Publisher.



Note: As you have logged in as the Administrator, the welcome page displays the **Reports**, **Schedules**, and **Admin** tabs. For the users who do not have administrator privileges, the **Admin** tab is not displayed.

[Back to Topic](#)

Setting Preferences

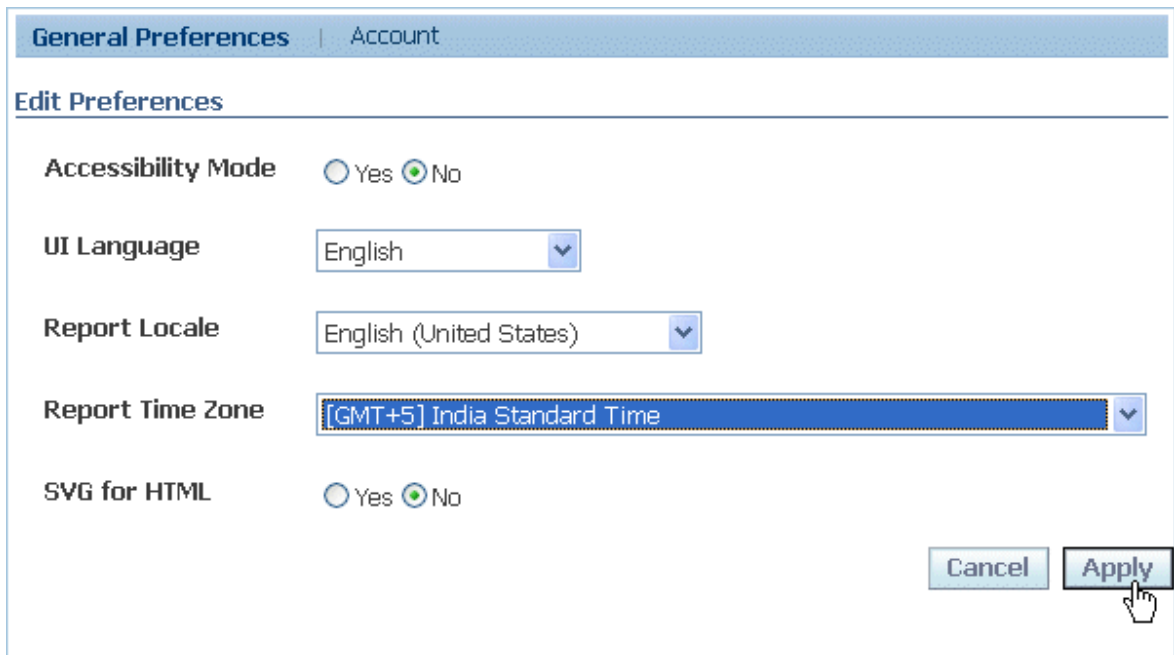
To change the preferences, perform the following steps:

1. Click **Preferences** link. (highlighted in the screen below):



The **Preferences** screen is displayed with the **General Preferences** and **Account** tabs.

2. Observe the options on the **General Preferences** tabbed page, and select the appropriate options for **UI Language**, **Reports Locale**, **Reports Time Zone** according to your requirements. Click **Apply**.



General Preferences | Account

Edit Preferences

Accessibility Mode ☐ Yes ☒ No

UI Language English

Report Locale English (United States)

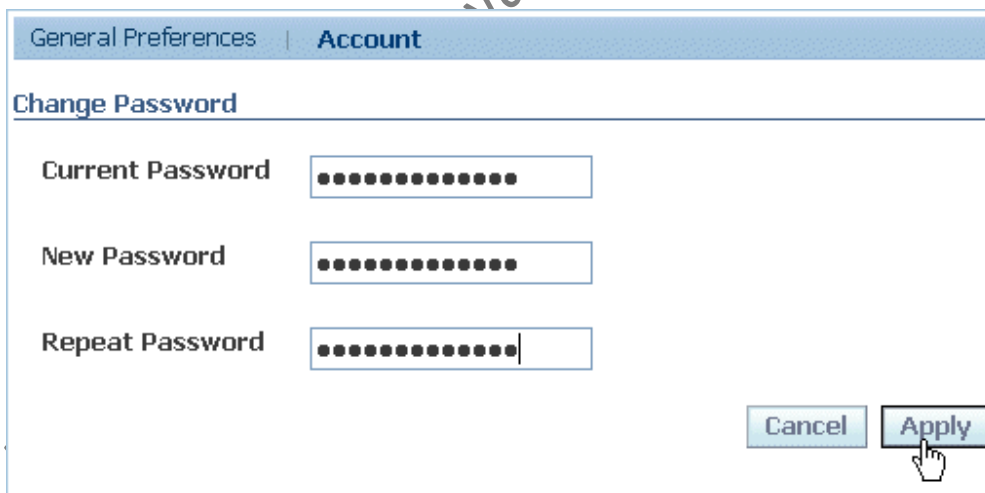
Report Time Zone [GMT+5] India Standard Time

SVG for HTML ☐ Yes ☒ No

Cancel Apply

Note: You can also enable the accessibility option.

3. To edit the password settings for the **Administrator** account, click the **Account** tab. Change the password for Administrator as required by entering the current and new passwords in the screen. Click **Apply** to save the preference settings.



General Preferences | **Account**

Change Password

Current Password [Masked]

New Password [Masked]

Repeat Password [Masked]

Cancel Apply

Note: If you have installed BI Publisher along with Oracle BI Enterprise Edition, for the integration between these to work, for any given user account, you should set the same password in BI Administration Tool and in BI Publisher. (Refer to Prerequisites section for setting up integration between BI Publisher and Oracle BI EE.)

[Back to Topic](#)

Creating a BI Publisher Report Based on Oracle Database

In this topic, you will create an employee salary report based on the HR schema of Oracle Database. To create a BI Publisher report based on a query directed to Oracle Database, perform the following steps:

1. Before you create a query based on Oracle Database, you need to define the connection details in the Admin tab. Click the **Admin** tab. Click **JDBC Connection** found under the **Data Sources** section of the page.



2. In the JDBC Data Sources screen that is displayed, click **demo** to edit the connection details for this data source.



Note: You can also add a new data source and define the connection details.

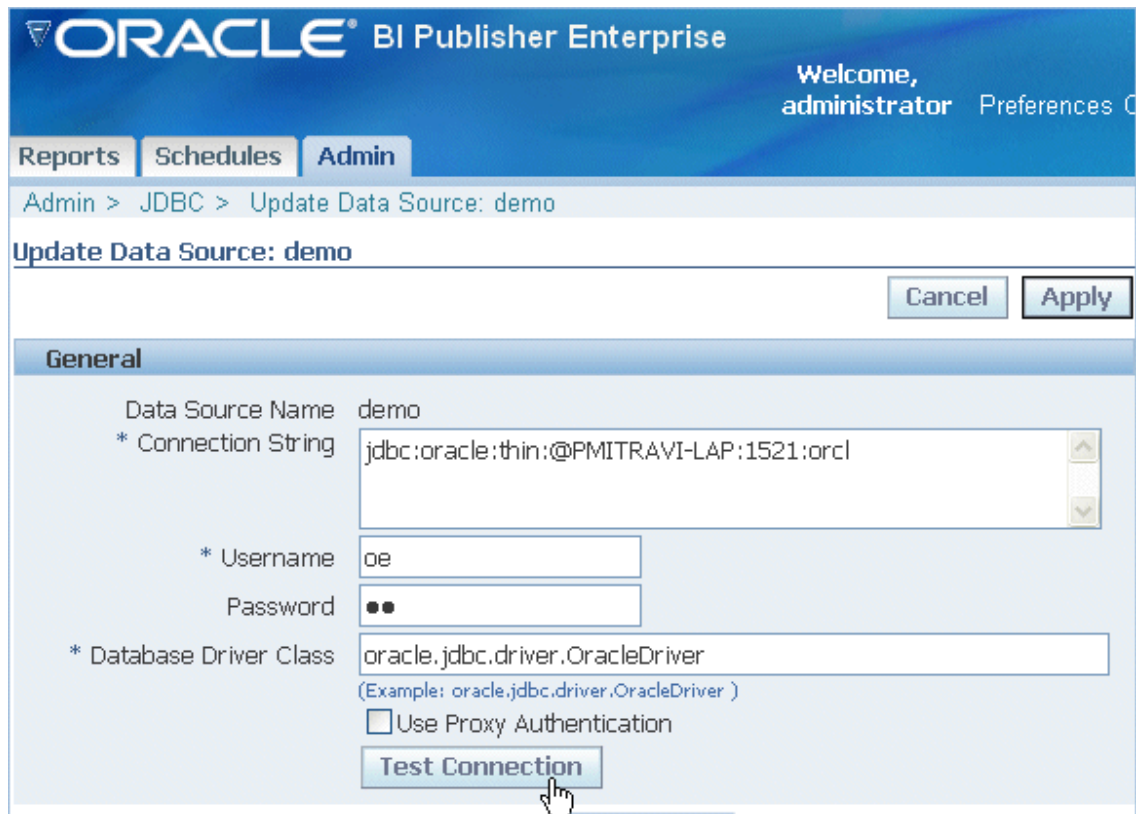
3. In the **Update Data Source** screen, enter the following details:
Connection String: This is of the format: jdbc:oracle:thin:@<Host name>: <Port>:<SID>, for example, a sample connection string may look like: jdbc:oracle:thin:@myhost:1521:orcl
User Name: oe
Password: oe
Database Driver Class: oracle.jdbc.driver.OracleDriver (This is the default.)

Do not click Cancel or Apply.

The screenshot shows the Oracle BI Publisher Enterprise Admin console. The top navigation bar includes 'Reports', 'Schedules', and 'Admin'. The breadcrumb trail is 'Admin > JDBC > Update Data Source: demo'. The page title is 'Update Data Source: demo'. There are 'Cancel' and 'Apply' buttons at the top right. The 'General' tab is selected, showing the following fields:

- Data Source Name: demo
- * Connection String: jdbc:oracle:thin:@PMITRAVI-LAP:1521:orcl
- * Username: oe
- Password: (masked with dots)
- * Database Driver Class: oracle.jdbc.driver.OracleDriver (with an example note: (Example: oracle.jdbc.driver.OracleDriver))
- ☐ Use Proxy Authentication
- Test Connection button

4. After entering the above details, click **Test Connection**. When the confirmation message is displayed saying that the connection is established successfully, click **Apply** to save the connection details.



ORACLE® BI Publisher Enterprise

Welcome, administrator Preferences

Reports Schedules Admin

Admin > JDBC > Update Data Source: demo

Update Data Source: demo

Cancel Apply

General

Data Source Name demo

* Connection String jdbc:oracle:thin:@PMITRAVI-LAP:1521:orcl

* Username oe

Password ●●

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

☐ Use Proxy Authentication

Test Connection



Admin > JDBC > Update Data Source: demo

 **Confirmation**

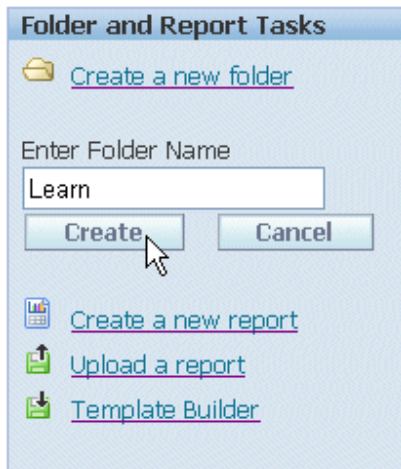
Connection established successfully.

Update Data Source: demo

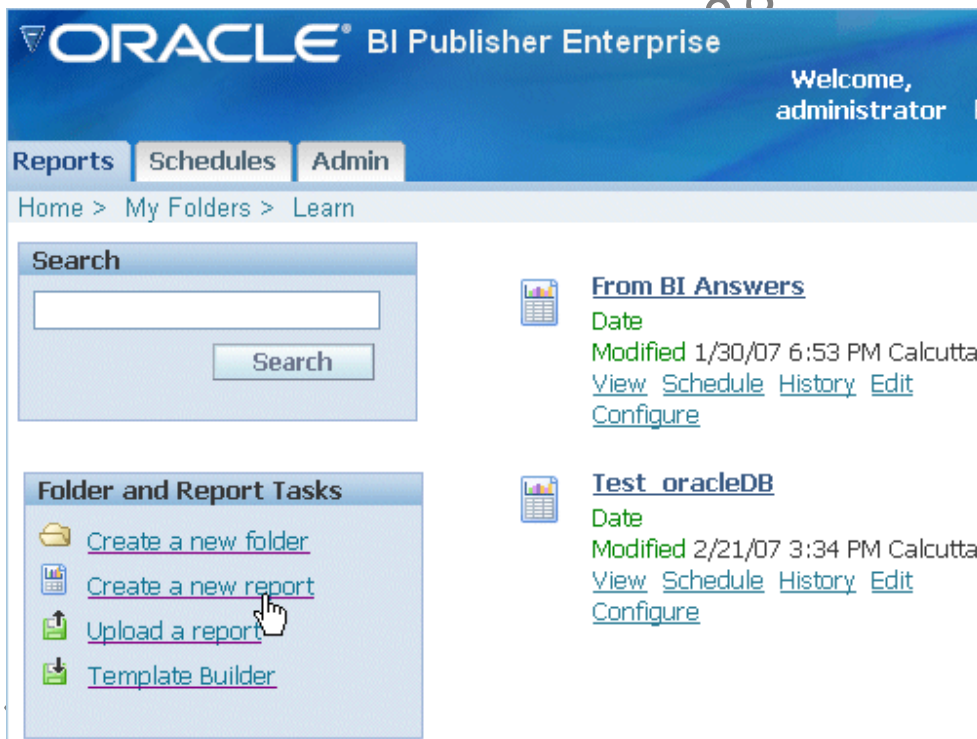
Cancel Apply

Note: OE schema also gives access to HR schema.

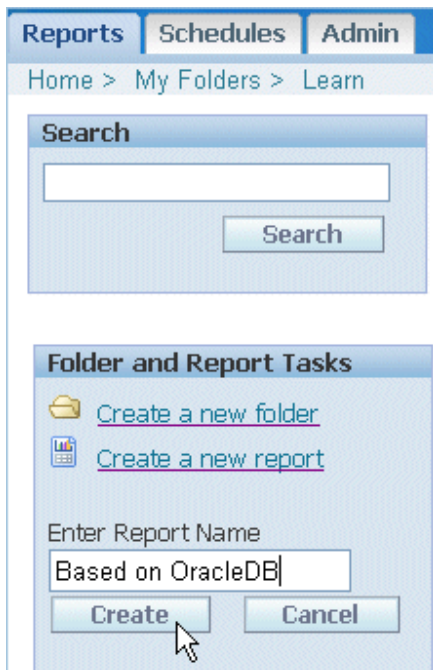
5. Click **Reports** to go back to the Reports page.
Click **My Folders** , and click **Create a New Folder** link (found in the **Folder and Report Tasks** section).
Enter **Learn** as the folder name and click **Create**. (You will save the reports you create in this tutorial in this folder.)



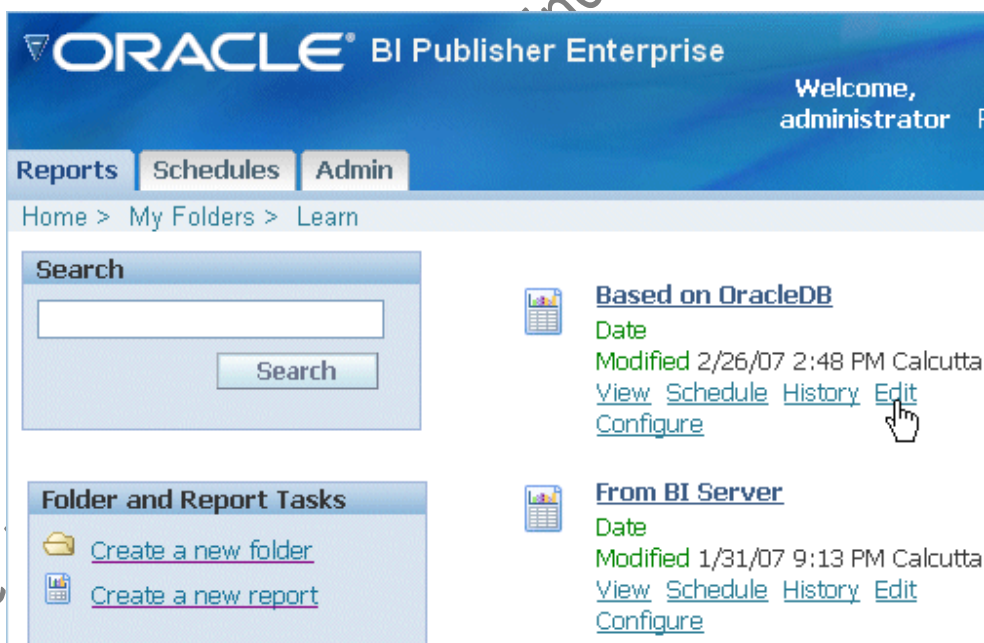
6. To create report based on Oracle Database, navigate to **My Folders > Learn**, and click **Create a New Report**.




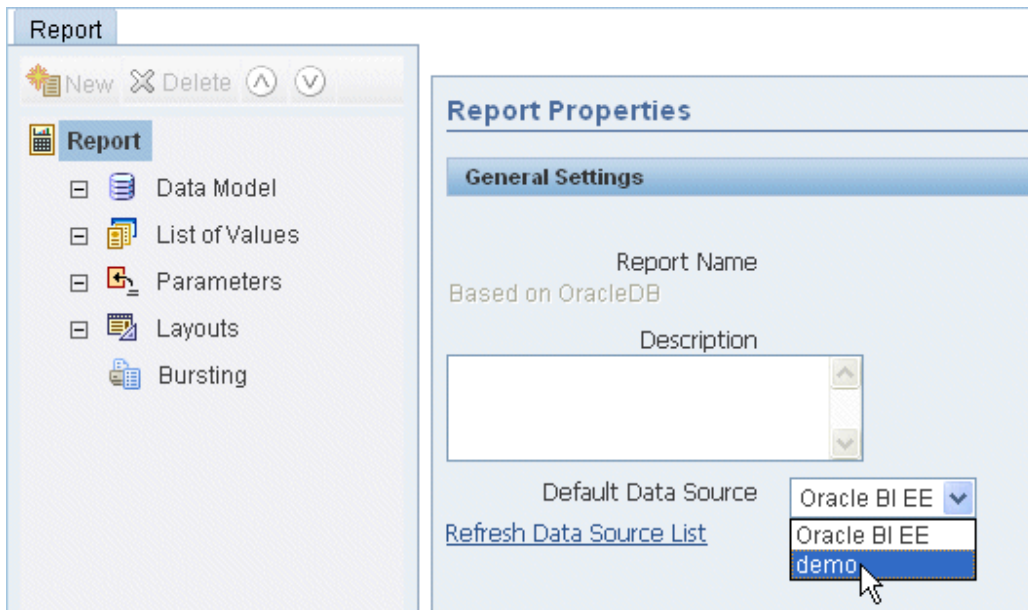
Enter **Based on OracleDB** as the name of the report, and click **Create**.



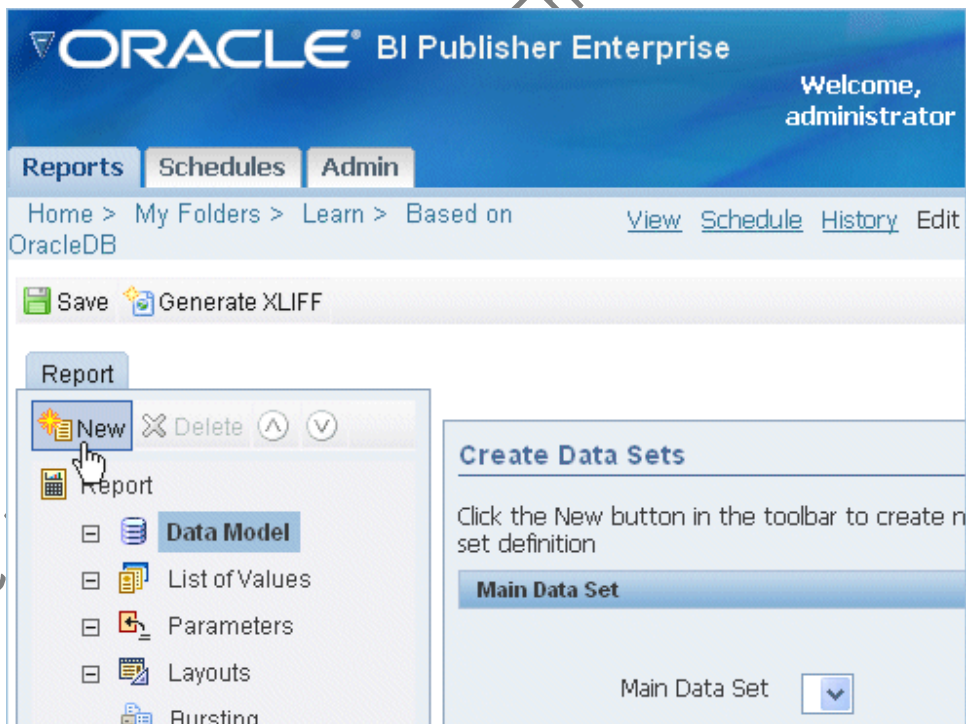
7. The report is displayed in the Learn folder in BI Publisher.
Click the **Edit** link under the name of the report to open the report in Edit mode.



8. In the **General Settings** section of the **Report Properties**, select **demo** from the **Default Data Source** drop-down list.
Click the **Save**  icon (found at the top-left corner) to save the changes.



9. Click **Data Model** and click **New** to define the data source for this report.



10. In the **Data Set** screen that appears, ensure that **SQL Query** is selected as **Type**, and **demo** is selected as **Data Source**. Select the **Cache Results** check box, and click **Query Builder** to define the query.

Data Set

General Settings

Name: New DataSet 1

Type: SQL Query

Details

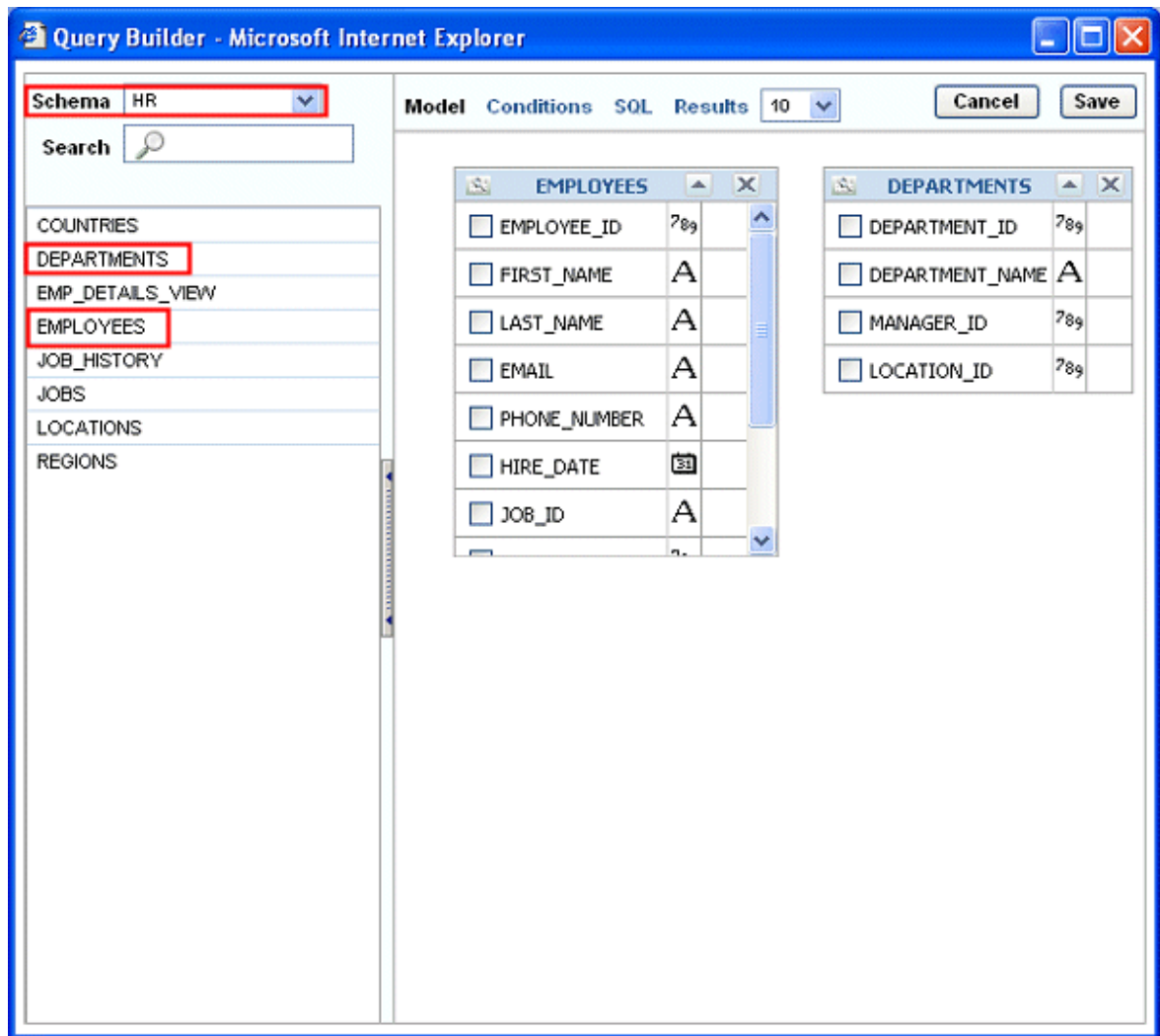
Data Source: ☒ Default Data Source ☐ demo Refresh Data Source List

☒ Cache Result

SQL Query

Query Builder

11. The **Query Builder** screen appears, ensure that **HR** is selected from the Schema drop-down list. This displays objects from HR schema on the left. Click **EMPLOYEES** and **DEPARTMENTS** tables to add them to the **Model** canvas on the right.



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

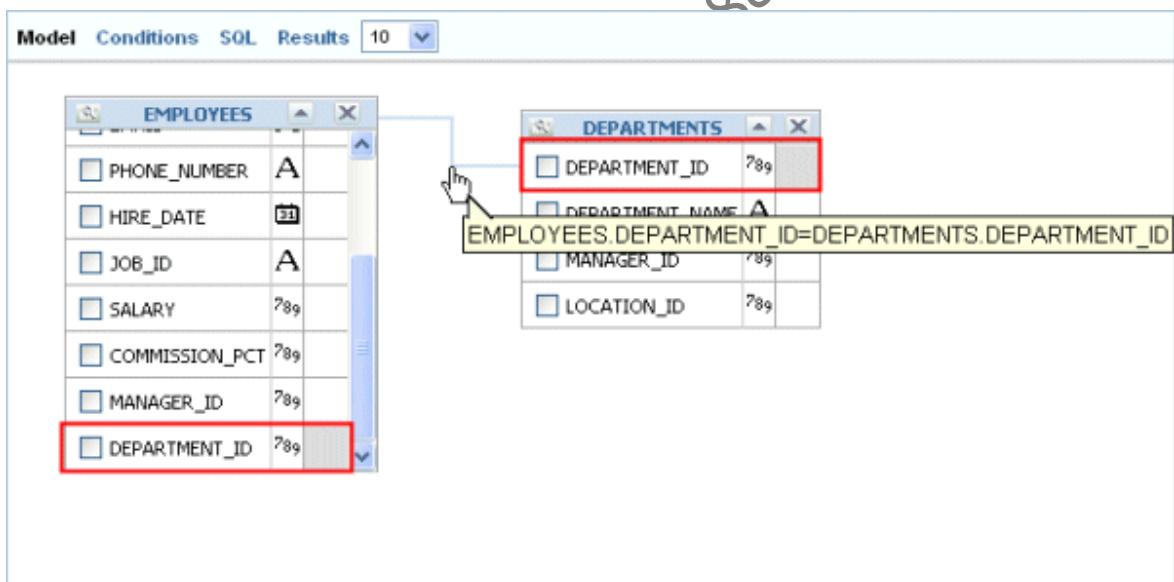
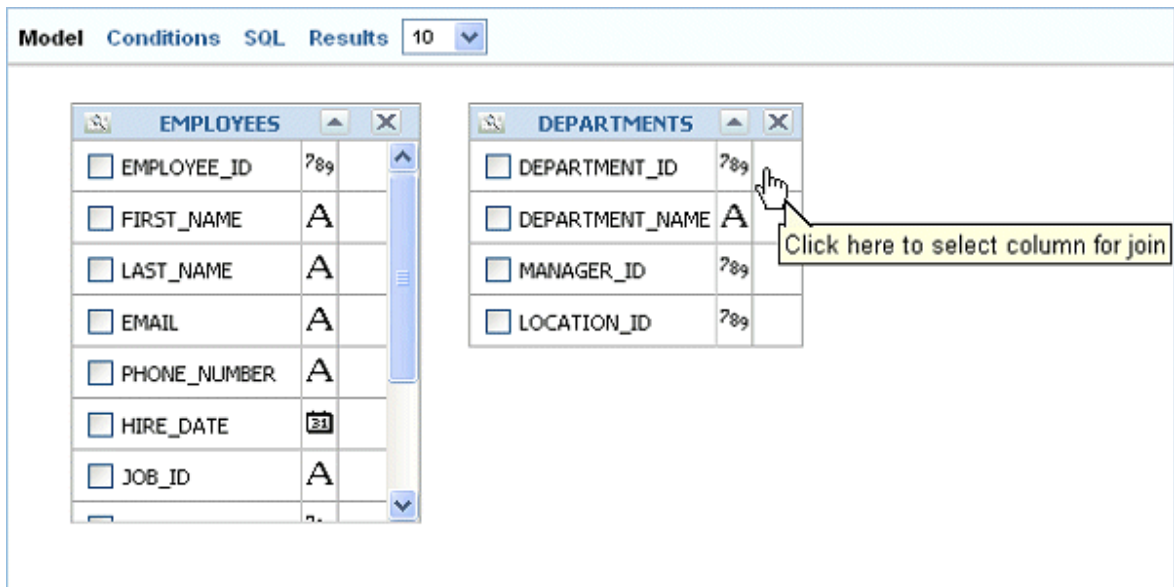
Click the box beside the **DEPARTMENT_ID** column in the **DEPARTMENTS** table. (See the following screens.)

Similarly click the box beside the **DEPARTMENT_ID** column in the **EMPLOYEES** table.

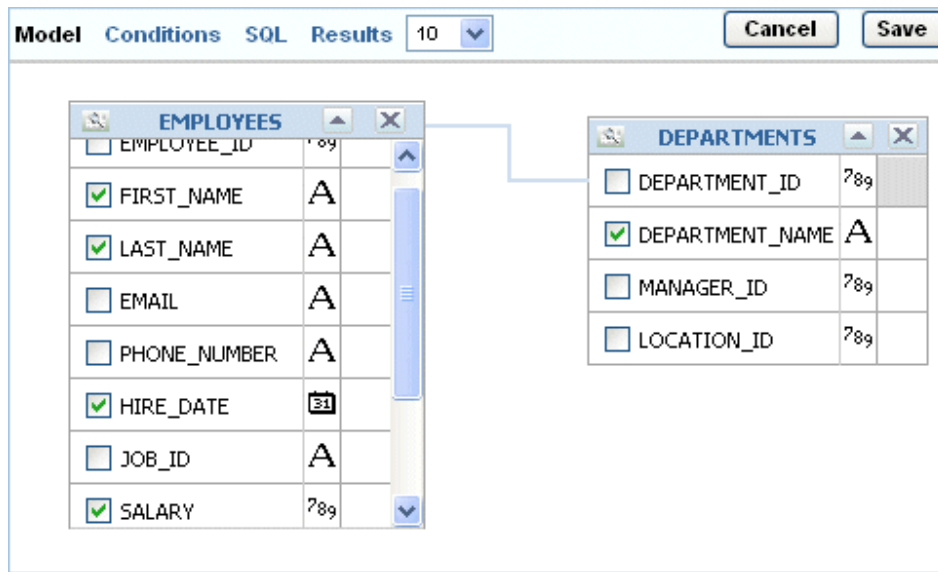
These boxes when marked for joins turn to light gray.


Also note that a fine line joining the tables appears in the Model canvas.

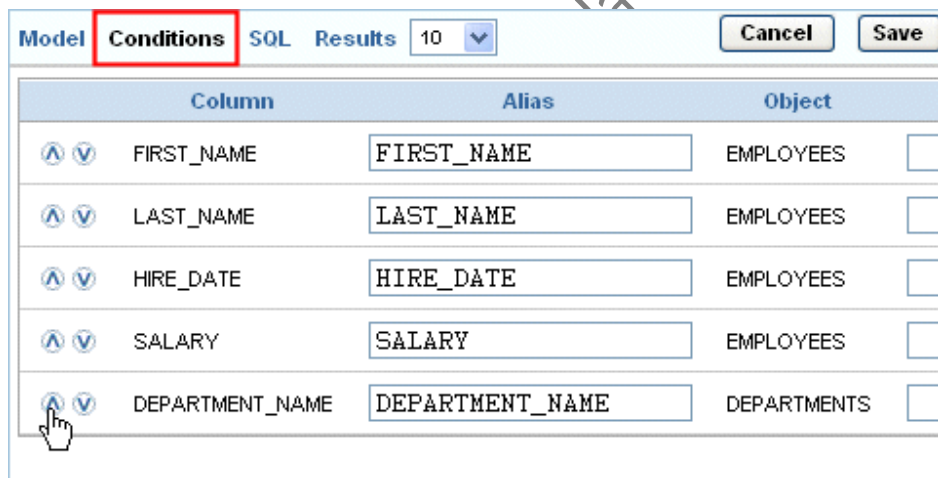
Hint: Take the help of the screens below:



13. Select the following columns from the tables (by selecting the check boxes beside the column names):
- Select **FIRST_NAME**, **LAST_NAME**, **HIRE_DATE**, and **SALARY** columns from the **EMPLOYEES** table
 - Select **DEPARTMENT_NAME** from the **DEPARTMENTS** table. (See the following screen.)



14. Click **Conditions**, and move the **DEPARTMENT_NAME**, to appear first in the list (as shown in the screen below). You can use these icons  beside each column to move the columns up or down.



Similarly, move **SALARY** and other columns, so that the final list appears like this:


Model Conditions SQL Results 10

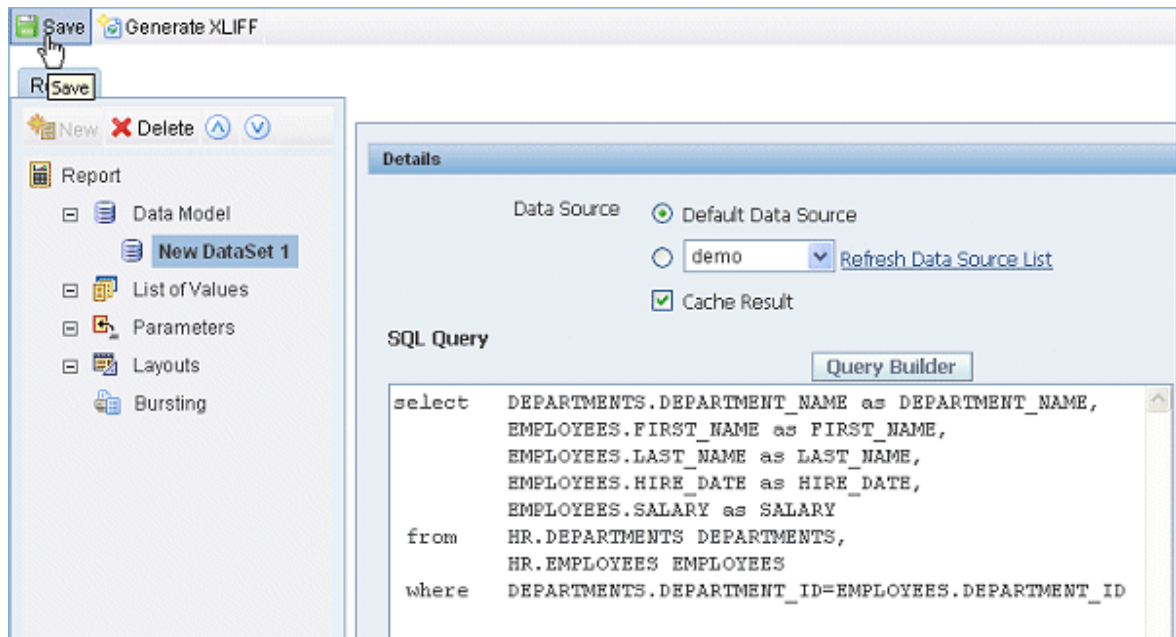
Column	Alias	Object
<input type="checkbox"/> <input type="checkbox"/> DEPARTMENT_NAME	DEPARTMENT_NAME	DEPARTMENTS <input type="checkbox"/>
<input type="checkbox"/> <input type="checkbox"/> FIRST_NAME	FIRST_NAME	EMPLOYEES <input type="checkbox"/>
<input type="checkbox"/> <input type="checkbox"/> LAST_NAME	LAST_NAME	EMPLOYEES <input type="checkbox"/>
<input type="checkbox"/> <input type="checkbox"/> HIRE_DATE	HIRE_DATE	EMPLOYEES <input type="checkbox"/>
<input type="checkbox"/> <input type="checkbox"/> SALARY	SALARY	EMPLOYEES <input type="checkbox"/>

15. Click **Results** to see how the query results appear in Query Builder.
Click **Save** to save the query.

Model Conditions SQL Results 10

DEPARTMENT_NAME	FIRST_NAME	LAST_NAME	HIRE_DATE	SALARY
Shipping	Donald	OConnell	1999-06-21 00:00:00.0	2600
Shipping	Douglas	Grant	2000-01-13 00:00:00.0	2600
Administration	Jennifer	Whalen	1987-09-17 00:00:00.0	4400
Marketing	Michael	Hartstein	1996-02-17 00:00:00.0	13000
Marketing	Pat	Fay	1997-08-17 00:00:00.0	6000
Human Resources	Susan	Mavris	1994-06-07 00:00:00.0	6500
Public Relations	Hermann	Baer	1994-06-07 00:00:00.0	10000
Accounting	Shelley	Higgins	1994-06-07 00:00:00.0	12000
Accounting	William	Gietz	1994-06-07 00:00:00.0	8300
Executive	Steven	King	1987-06-17 00:00:00.0	24000

16. This will take you back to the **Data Set** screen, with the query you created reflected in the **SQL Query** text area.
Click **Save**  to save the BI Publisher report.



17. If required, you can further edit the query manually. For example, instead of displaying the FIRST_NAME and LAST_NAME columns separately, you may want to concatenate both these columns and display this as a single column EMPLOYEE_NAME.
So you can modify the query as:

```
select DEPARTMENTS.DEPARTMENT_NAME as DEPARTMENT_NAME,
       EMPLOYEES.FIRST_NAME || ' ' || EMPLOYEES.LAST_NAME as EMPLOYEE_NAME,
       EMPLOYEES.HIRE_DATE as HIRE_DATE,
       EMPLOYEES.SALARY as SALARY
from   HR.DEPARTMENTS DEPARTMENTS,
       HR.EMPLOYEES EMPLOYEES
where  DEPARTMENTS.DEPARTMENT_ID=EMPLOYEES.DEPARTMENT_ID
```

Data Set

General Settings

Name

New DataSet 1

Type

SQL Query

Details

Data Source

☒ Default Data Source

☐ demo


Refresh Data Source List

☒ Cache Result

SQL Query

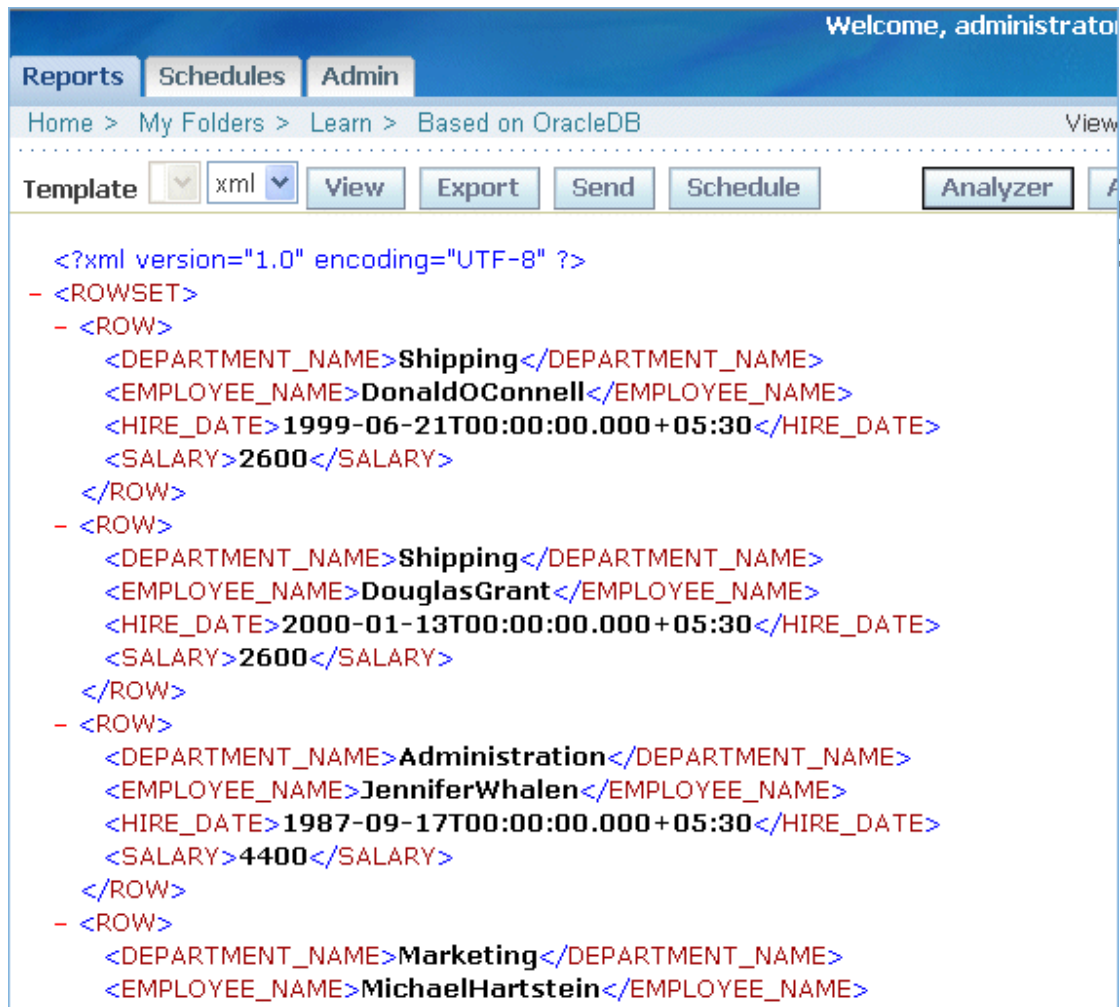
Query Builder

```
select  DEPARTMENTS.DEPARTMENT_NAME as DEPARTMENT_NAME,
        EMPLOYEES.FIRST_NAME || ' ' || EMPLOYEES.LAST_NAME as EMPLOYEE_NAME,
        EMPLOYEES.HIRE_DATE as HIRE_DATE,
        EMPLOYEES.SALARY as SALARY
from    HR.DEPARTMENTS DEPARTMENTS,
        HR.EMPLOYEES EMPLOYEES
where   DEPARTMENTS.DEPARTMENT_ID=EMPLOYEES.DEPARTMENT_ID
```

Click **Save**  again to save the changes to the query.

Note: Ensure that a space is included in the query (as in the example) between the **FIRST_NAME** and **LAST_NAME** columns in the concatenation string of **EMPLOYEE_NAME**. Also, note that once you have edited the query manually, you will not be able to edit the query in Query Builder.

- Click **View** to view the report. Because you have not defined a template, you can view only XML data. Click **View** again to view the XML data.



Note: You may not be able to interpret the XML data, but you may want to check whether the BI Publisher report is returning some valid data by viewing the XML data before creating a template for the report. Creating and publishing templates is covered in the next topic.

[Back to Topic List](#)

Creating Report Layouts Using BI Publisher Desktop (Template Builder) in MS Word

In this topic, you create RTF template for a BI Publisher report and publish it. You will also work with multiple templates for a report, and view the report data using these templates in various formats.

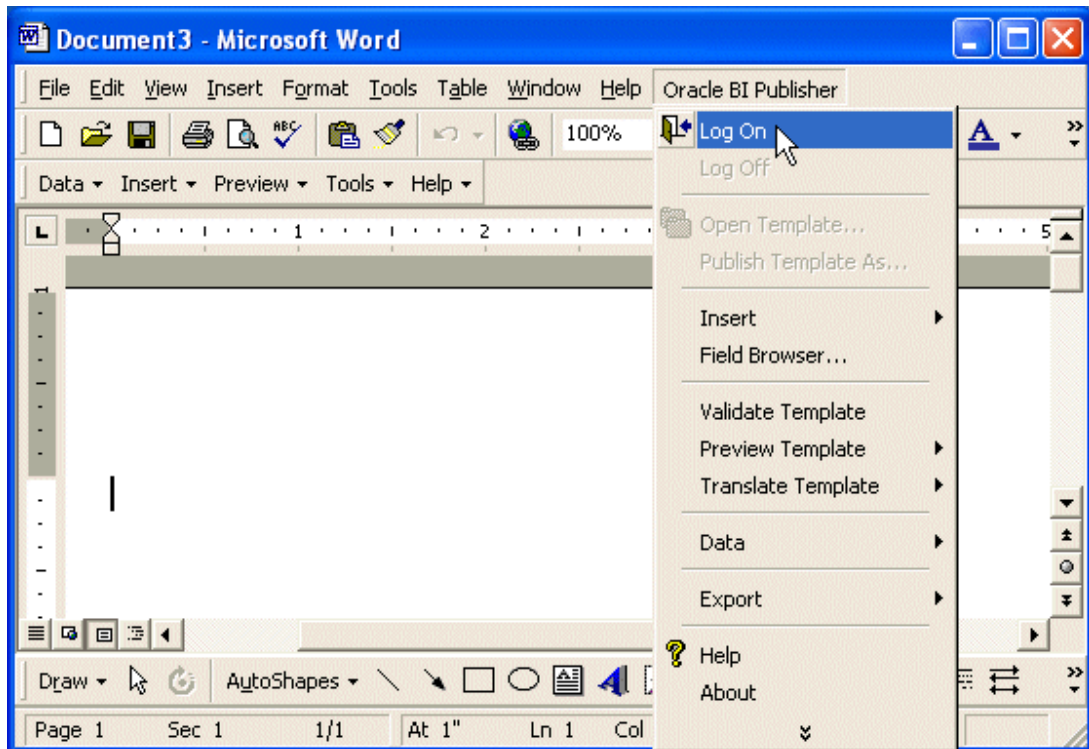
Note: All the subtopics in this topic are continuous, so follow the instructions, and do not close any applications or windows as mentioned in the steps.

- ❑ [Creating an RTF Template with a Table and Chart](#)
- ❑ [Publishing the Template for a BI Publisher Report](#)
- ❑ [Formatting the Templates Using MS Word Native Features](#)

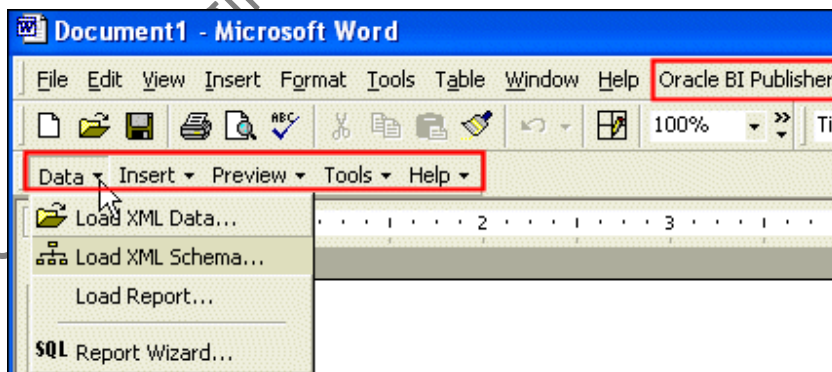
- ❑ Creating and Publishing Multiple Templates for a Report
- ❑ Viewing Report Data in BI Publisher Using Templates

Creating an RTF Template with a Table and Chart

1. Start the MS Word application from the program menu. From the **Oracle BI Publisher** menu, select **Log On**.



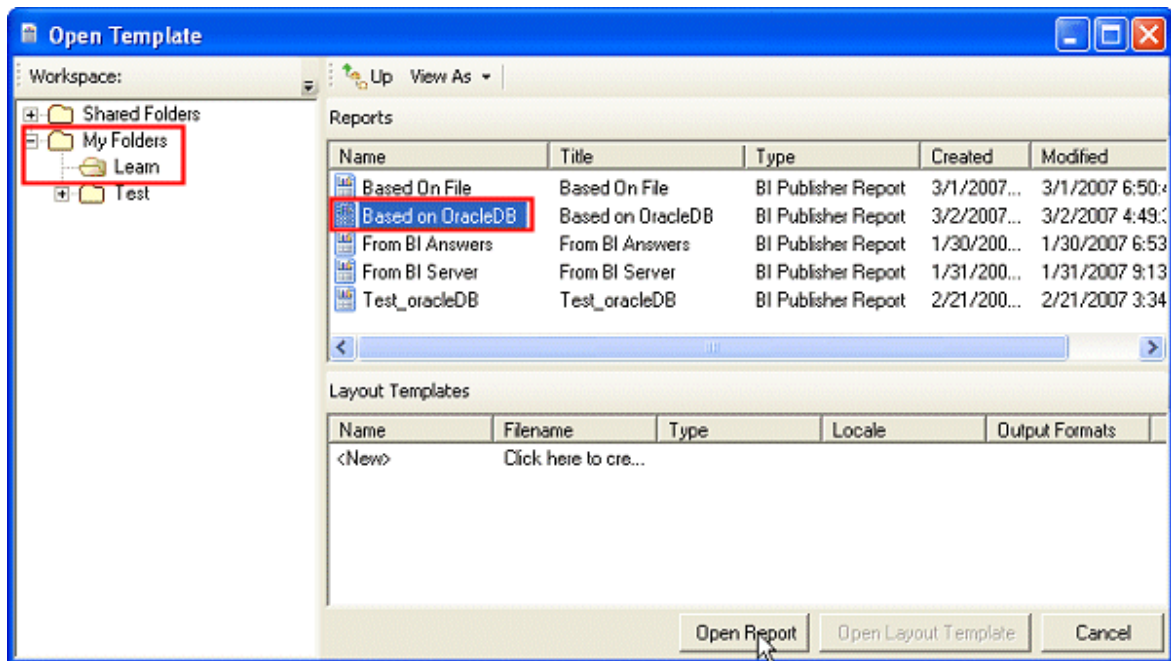
Note: The Oracle BI Publisher menu is displayed in MS Word only when you have successfully installed the Oracle BI Publisher mentioned in step 3 of the **Prerequisites** section. Also, observe the BI Publisher toolbar in MS Word, with the Data, Insert, Help menus. Observe the various options in these menus.



2. In the Login screen that appears, enter **Administrator** as the **Username** and **Password**, and click **Login**.

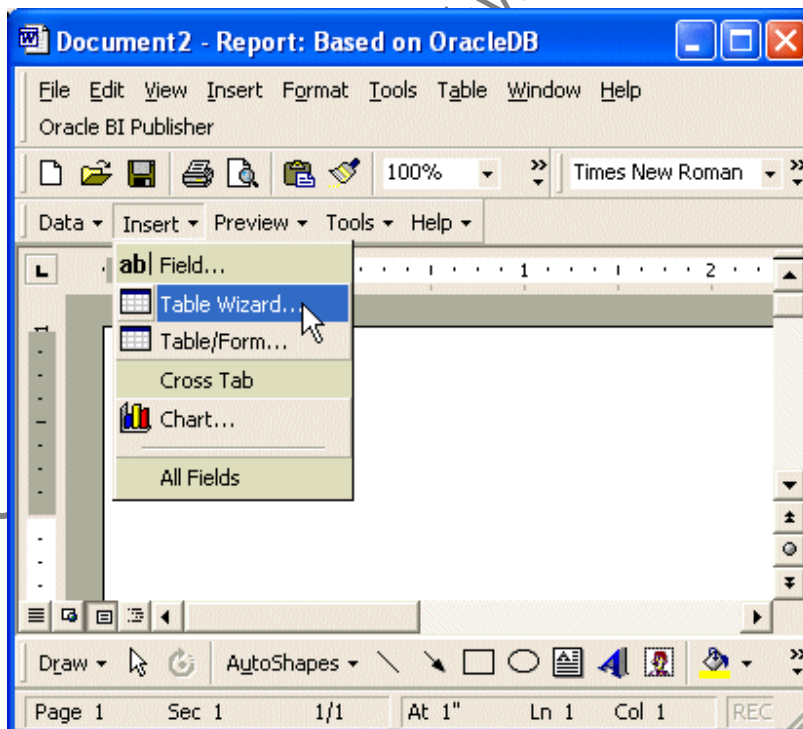
The first time when you connect, you may be asked for the report server URL, enter the URL which is of the format:
http://<Host>:9704/xmlpserver

3. This displays the **Open Template** window. Ensure that **BI Publisher** is selected from the **Workspace** drop-down list. Navigate and select the **Based on Oracle DB** report that you have created from **My Folders> Learn**. Click **Open Report**.

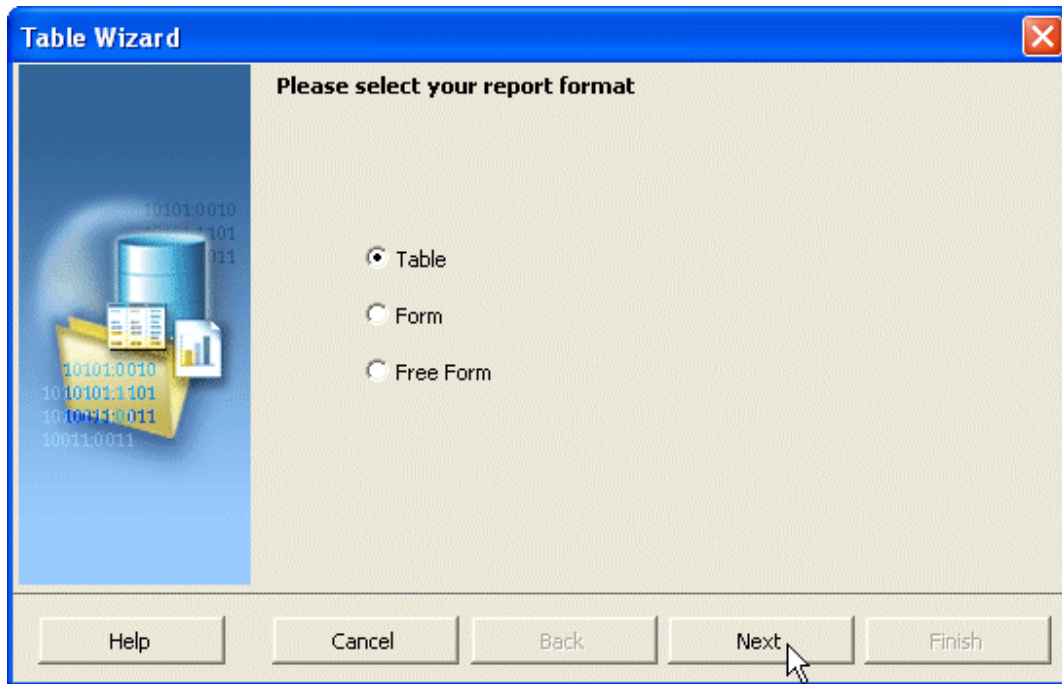


Note: When you open the report you will not see any data in the MS Word document, but this will load the XML data definiti facilitate the defining of a template.

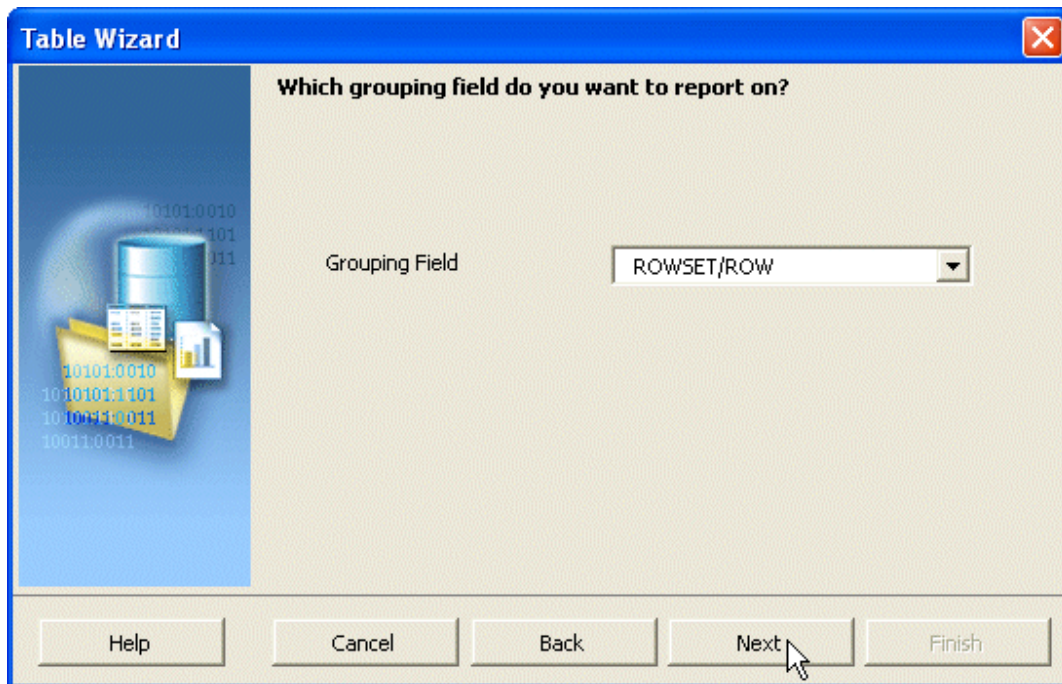
4. In the Word document that loads this report, select **Insert > Table Wizard** on the BI Publisher toolbar to define a format for i query.



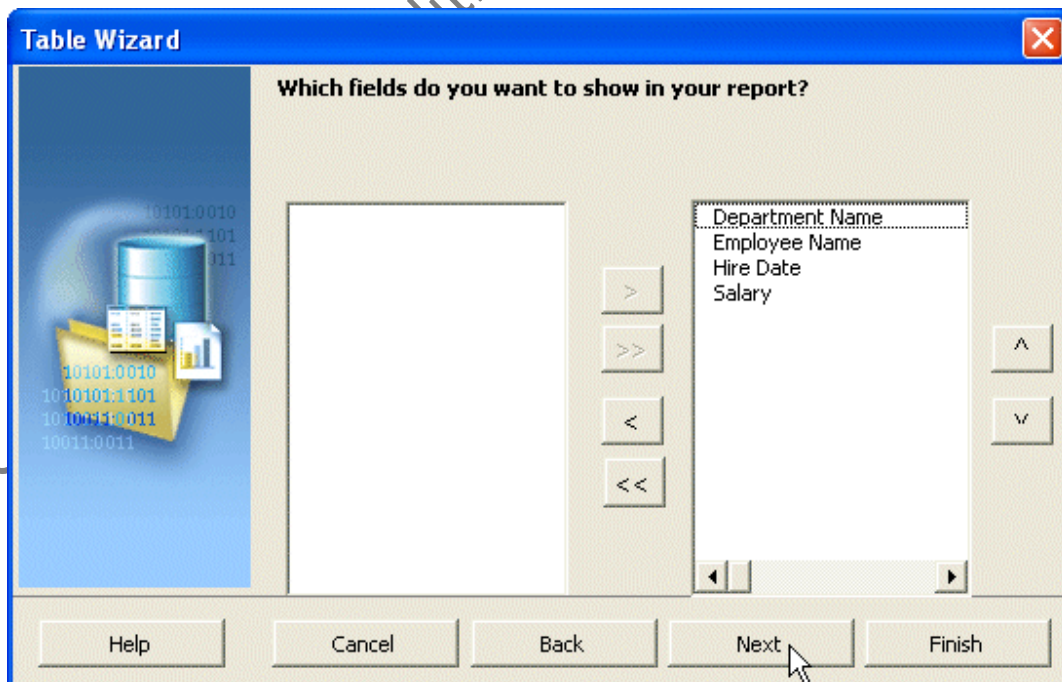
5. This displays the **Table Wizard**. Select **Table** and click **Next**.



6. In the next step, ensure that **ROWSET/ROW** is selected as the **Grouping Field**, and click **Next**.



7. In the next step, click  to include all the available columns in the table. (See the screen below.) Click **Next**.



8. In the next step, select **Department Name** from the **Group By** drop-down list, ensure that the **Group above** option is selected for other options. Click **Next**.

Table Wizard

How would you like to group your report?

Group By: **Department Name** ☒ Group above ☐ Data already sorted

Then By: ☒ Group above ☐ Data already sorted

Then By: ☒ Group above ☐ Data already sorted

Then By: ☒ Group above ☐ Data already sorted

Buttons: Help, Cancel, Back, **Next**, Finish

9. In the next step, select **Salary** from the **Sort By** drop-down list, and select the options **Descending** and **Number** to sort the descending order. Click **Next**.

Table Wizard

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

Sort By: **Salary** ☐ Ascending ☒ Descending ☐ Date/Text ☒ Number

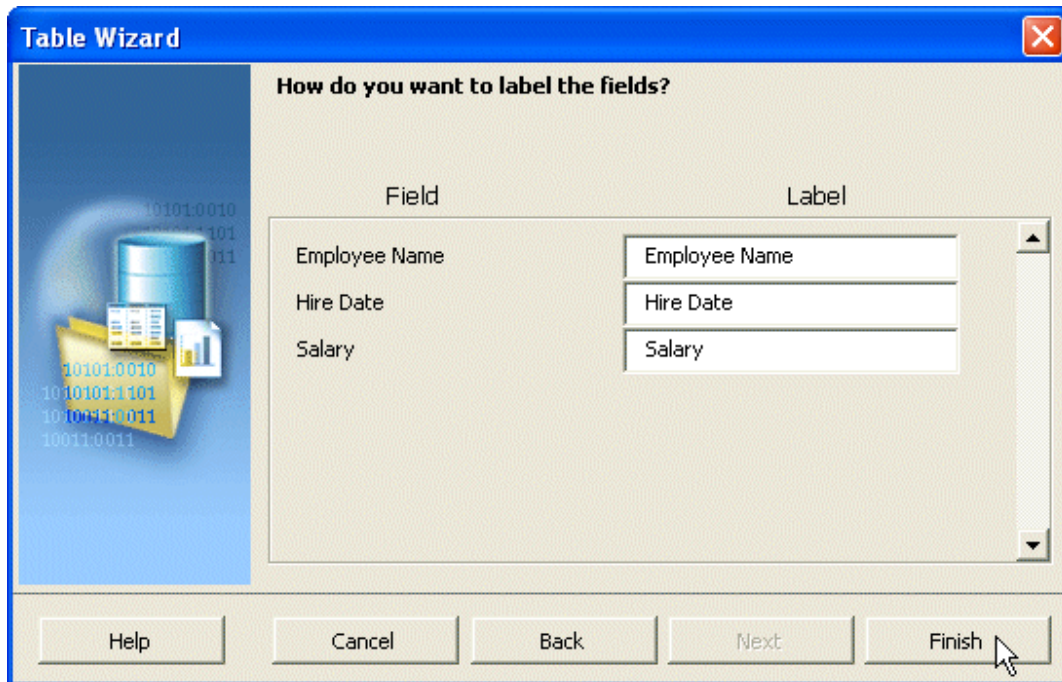
Then By: ☒ Ascending ☐ Descending ☐ Date/Text ☐ Number

Then By: ☒ Ascending ☐ Descending ☐ Date/Text ☐ Number

Then By: ☒ Ascending ☐ Descending ☐ Date/Text ☐ Number

Buttons: Help, Cancel, Back, **Next**, Finish

10. In the next step you can edit the labels of the columns as required. Accept the defaults and click **Finish**.



The template you created looks like this:

G DEPARTMENT_NAME		
Employee Name	Hire Date	Salary
F EMPLOYEE_NAME	HIRE_DATE	SALARY_E
E		

Important Note: The BI Publisher Desktop Template Builder has just created a table for you. Notice the words and letters \ background. These are called form fields. Form fields are Word objects that allow you to reference other data (for example, Publisher uses form fields in two ways:

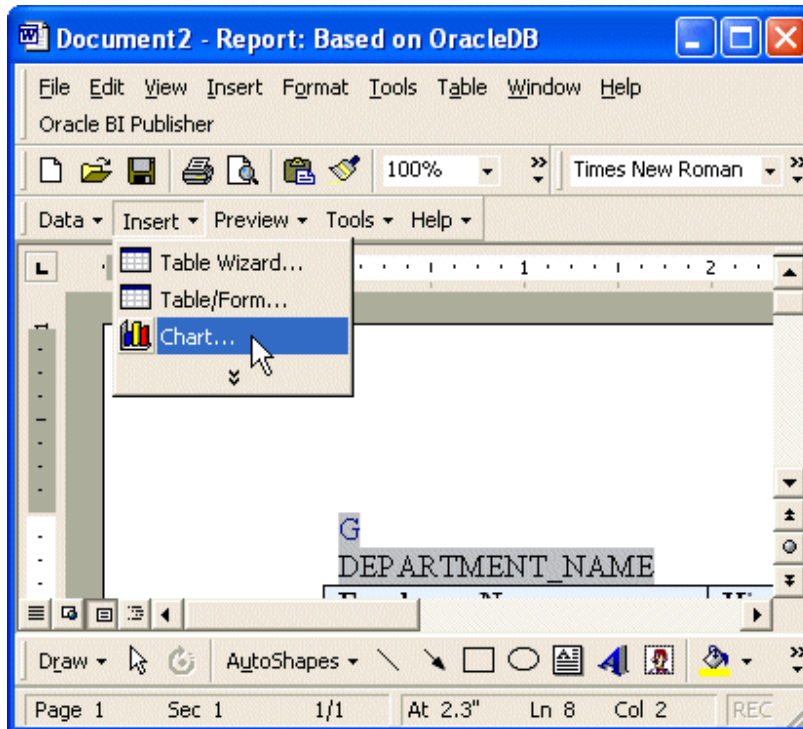
- First is to reference data fields from the report definition (like YEAR and MONTH).
- The second use is to embed instructions that control how the data fields will be laid out (like G-Group By, F- For E

If you are curious to know what these instructions are, double-click the form field and view the Help text. It is important to tr carefully and not accidentally delete or move them. Doing so will change the layout of the table in your report. Also, you car

own form fields with XSL commands to do more sophisticated things with the table layout.

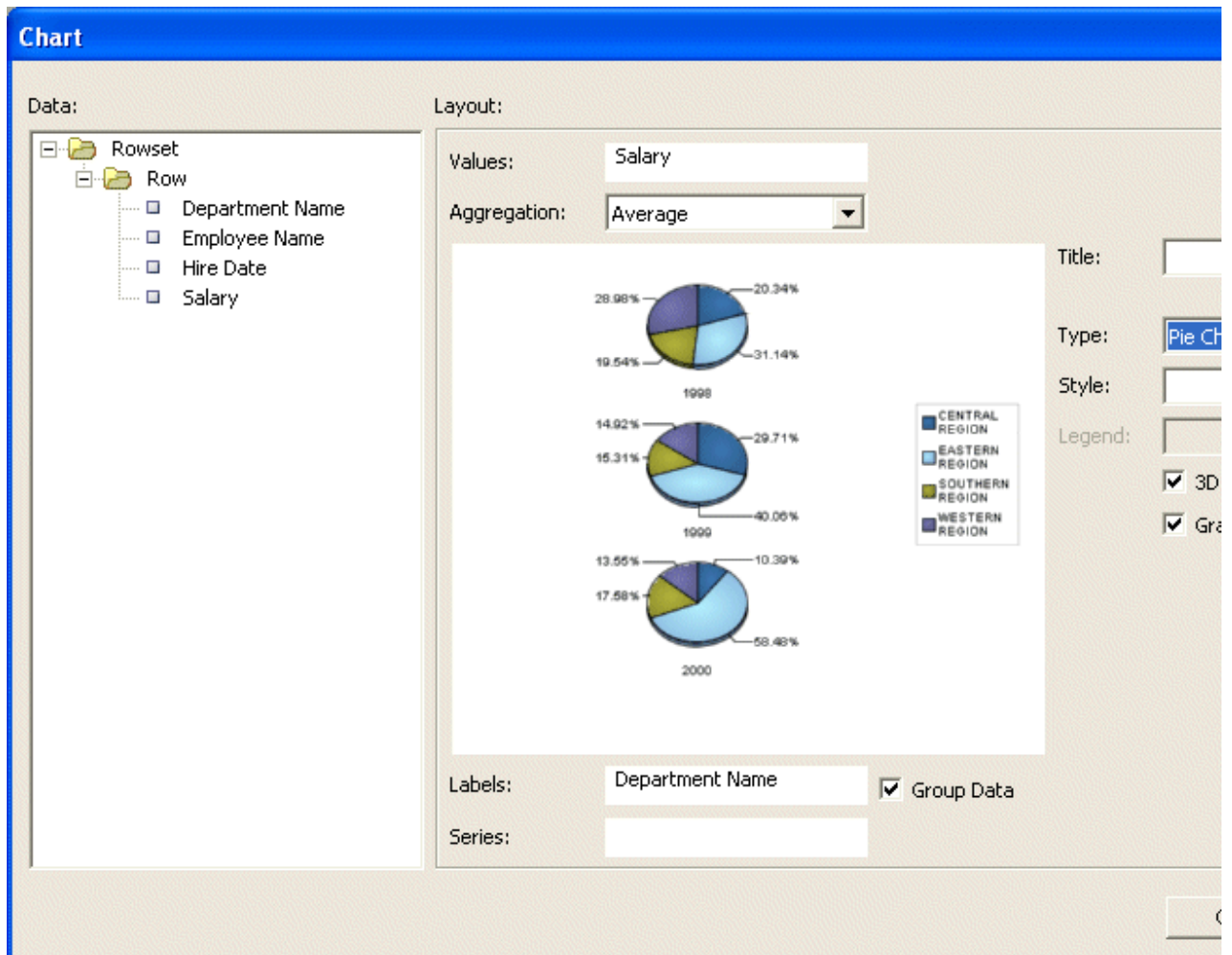
Also, you can additionally use MS Word's native formatting features on this template, such as changing the background and title, and so on. This is covered in the next topic.

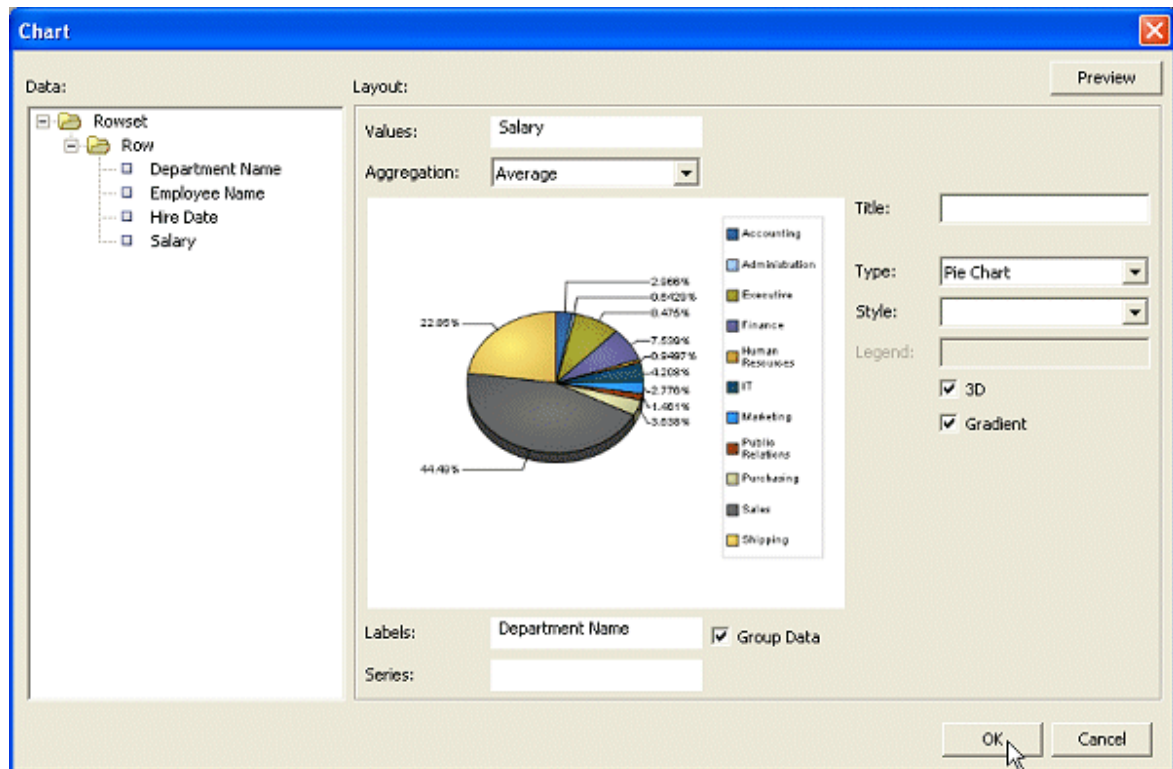
11. You can also add a chart in the template. For example, you can add a chart to display the average employee salaries by department. To add a chart to the template, select **Insert > Chart**.



12. In the **Chart** window that appears, define the graph characteristics by following the instructions listed below carefully:

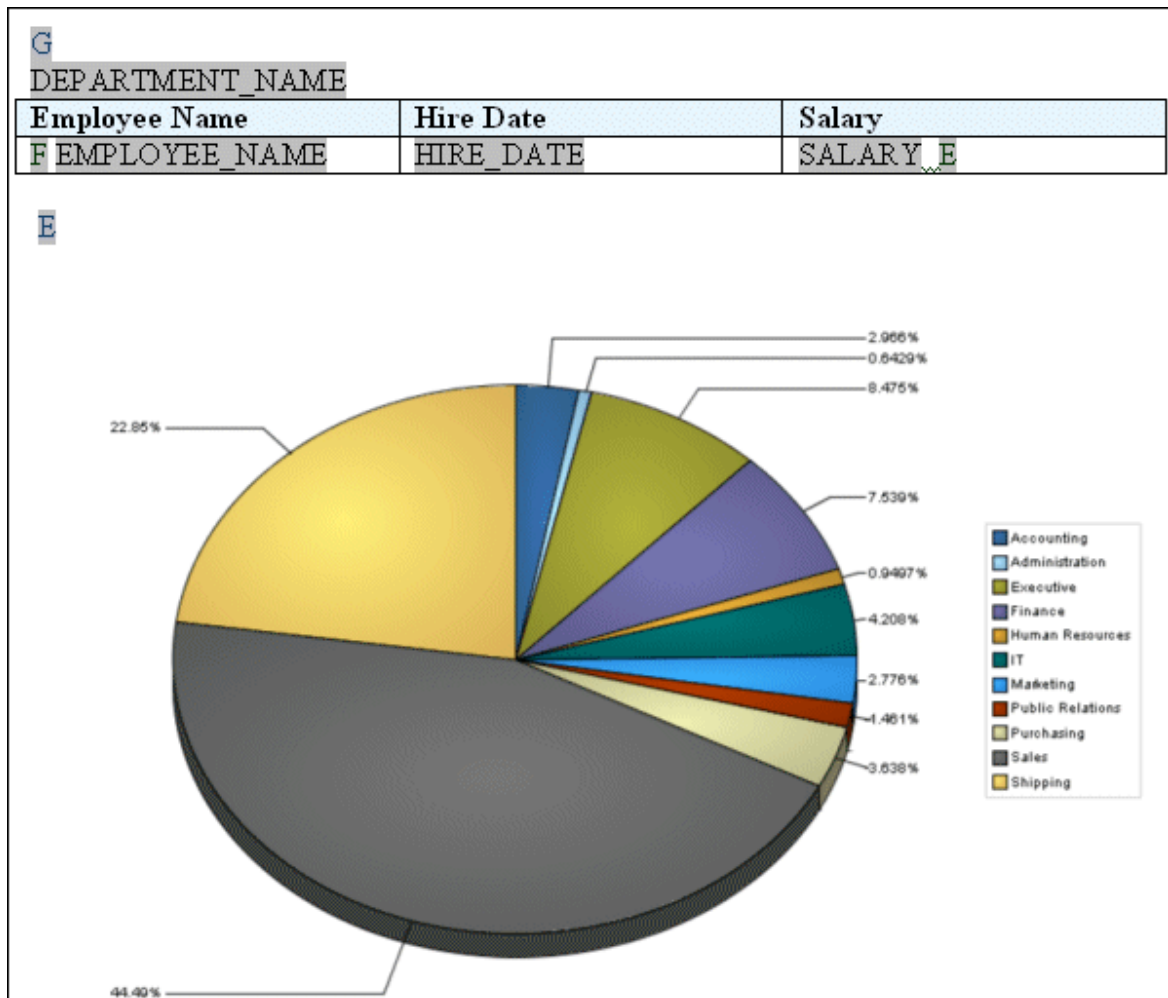
1. Drag **Salary** to the **Values** field and **Department Name** to the **Labels** field. Also, select **Average** from the **Aggregate** list for the **Salary**. (These are highlighted in the screen below.)
2. Select **Pie Chart** from the **Type** drop-down list for the graph.
3. Click **Preview** to preview how the graph looks like, and click **OK**.



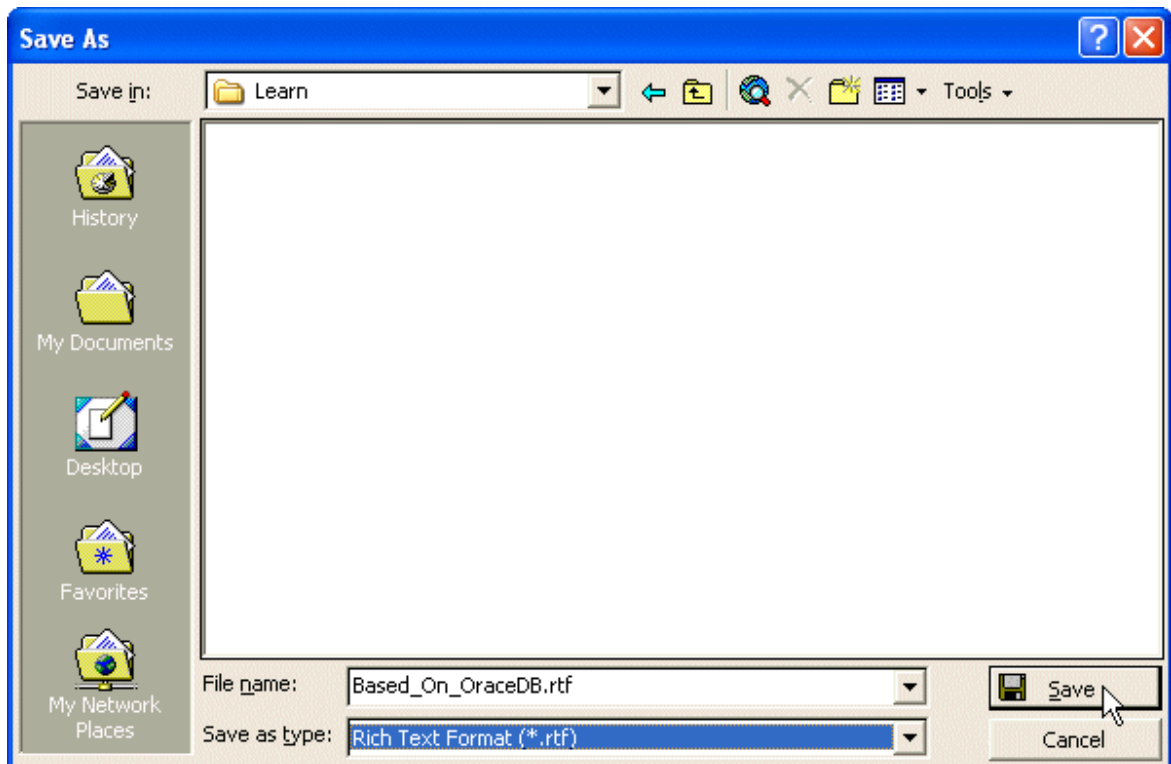


Note: If you do not like the style and type of the graphs in the preview, you can change them after the preview or later.

13. Now the template along with the graph in the Word document looks like this:

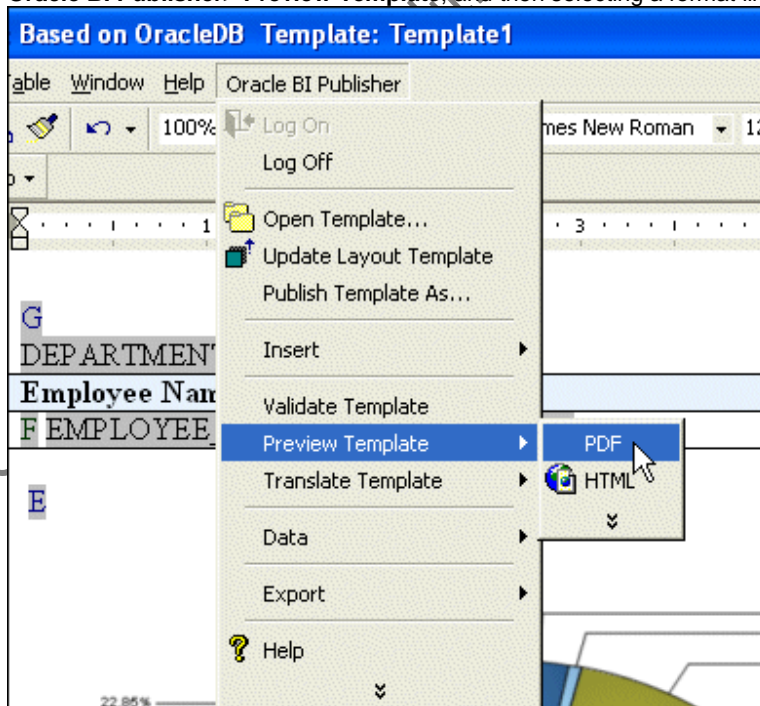


14. Select the **File> Save As** option. Enter **Based_On_OracleDB.rtf** as the name of the template, and click **Save**. Do not close the file, or log out of BI Publisher.

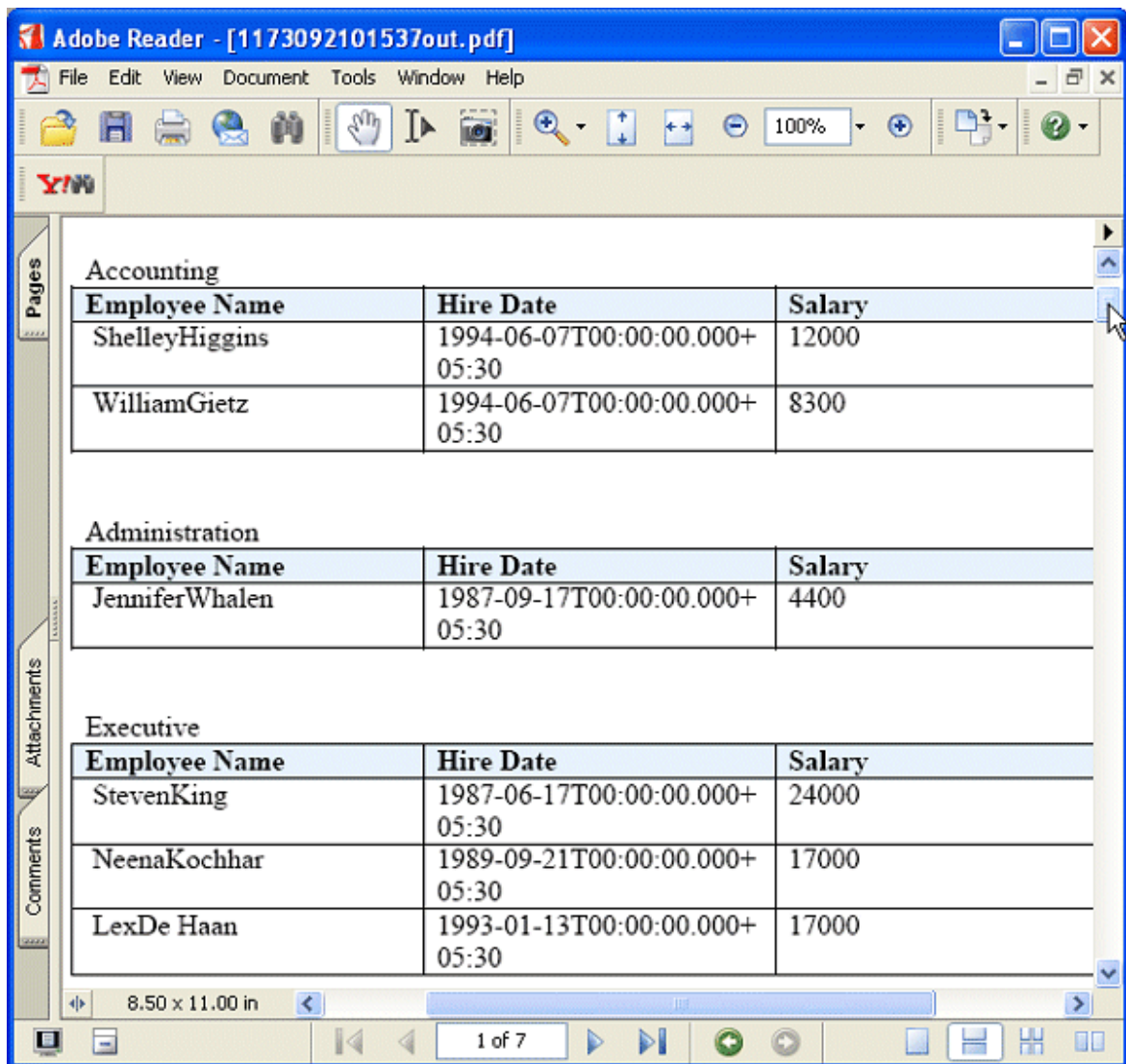


Note: You can save the file in any local folder on your system, but you have to save the template in the .rtf format (not in th

15. You can also preview how the template looks like with the data by selecting **Oracle BI Publisher> Preview Template** and then selecting a format like **PDF** to view the data.



The data looks like this:



Adobe Reader - [1173092101537out.pdf]

File Edit View Document Tools Window Help

100%

Pages

Accounting

Employee Name	Hire Date	Salary
ShelleyHiggins	1994-06-07T00:00:00.000+05:30	12000
WilliamGietz	1994-06-07T00:00:00.000+05:30	8300

Administration

Employee Name	Hire Date	Salary
JenniferWhalen	1987-09-17T00:00:00.000+05:30	4400

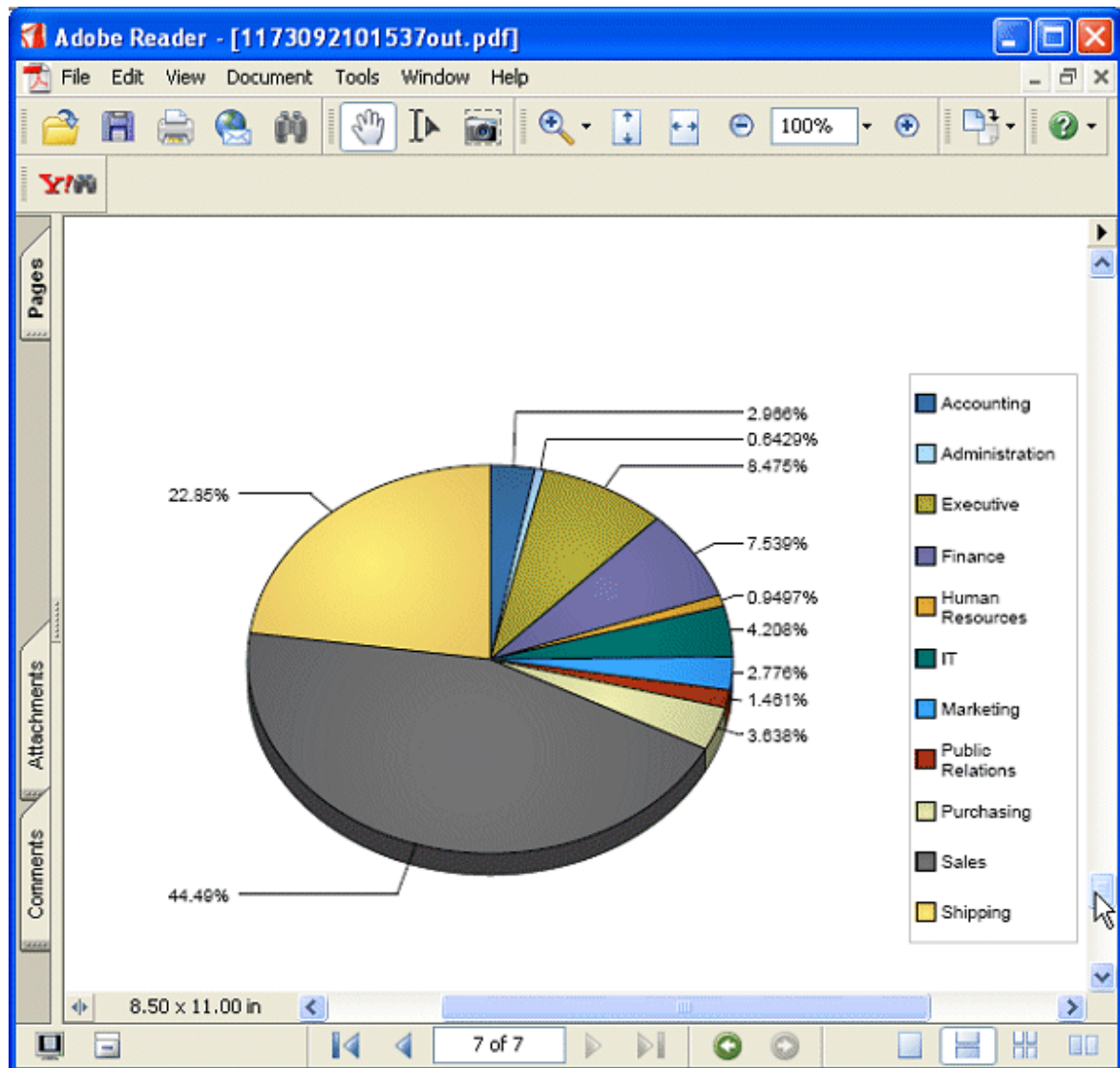
Executive

Employee Name	Hire Date	Salary
StevenKing	1987-06-17T00:00:00.000+05:30	24000
NeenaKochhar	1989-09-21T00:00:00.000+05:30	17000
LexDe Haan	1993-01-13T00:00:00.000+05:30	17000

8.50 x 11.00 in

1 of 7

The graph looks like this:



[Back to Topic](#)

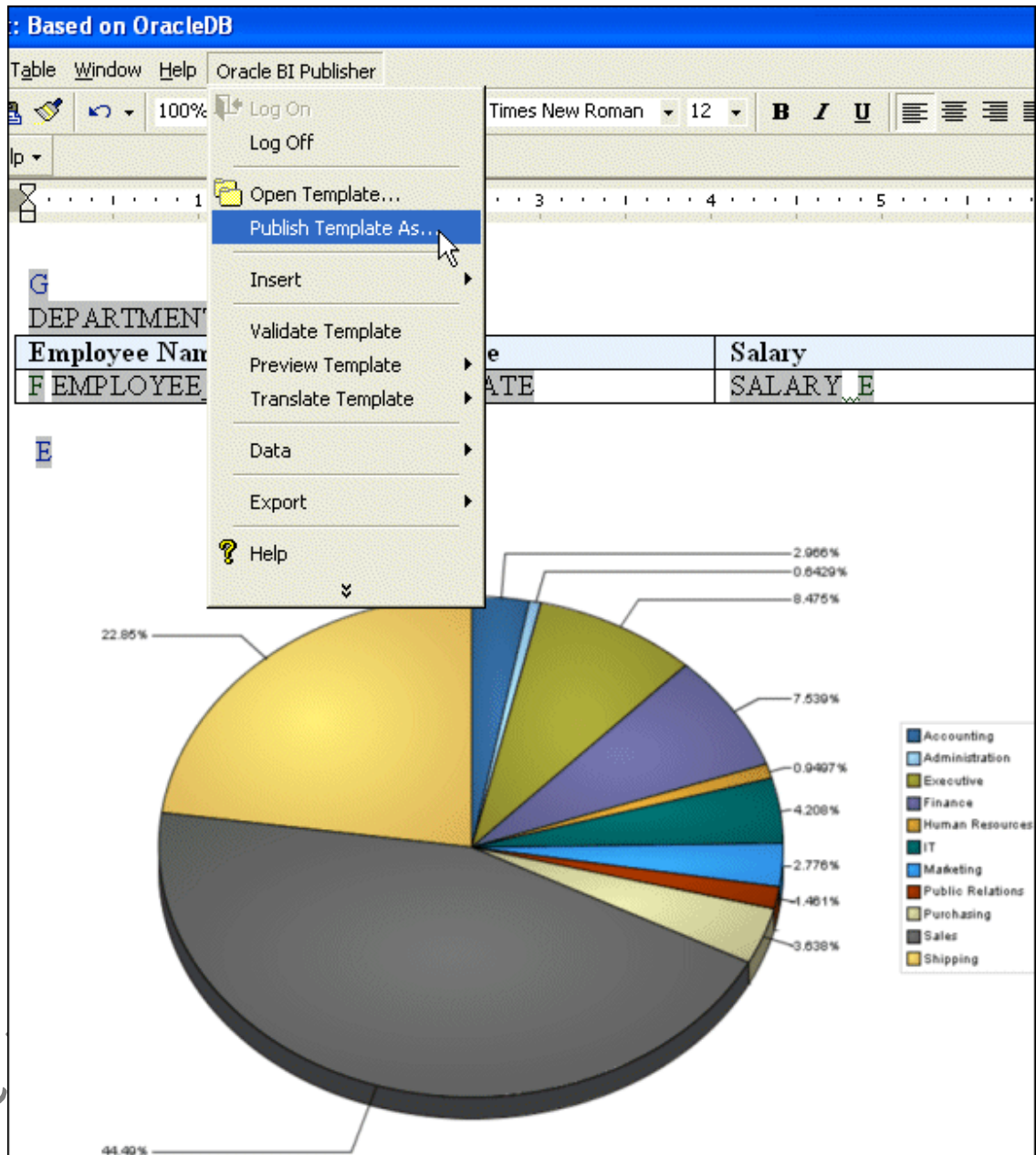
Publishing the Template for a BI Publisher Report

You can directly publish a template that you have created in MS Word for a BI Publisher report, provided:

- You are connected to BI publisher from MS Word
- The BI Publisher report is opened in MS Word
- The template is saved in RTF format

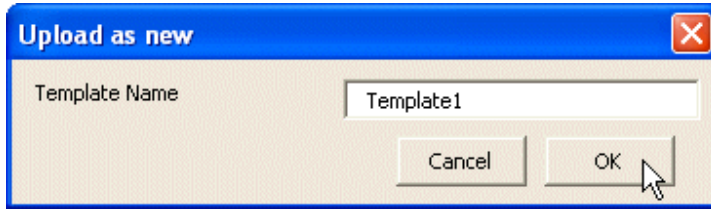
To publish the **Based_On_OracleDB.rtf** template that you created in MS Word, and then view data for the report in BI Publisher using this template, perform the following steps: (Note that the template you have created satisfies all the above criteria.)

1. In MS Word, select the **Oracle BI Publisher> Publish Template As** option.

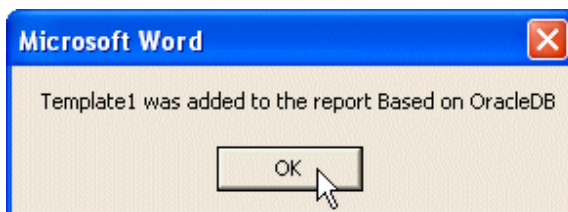


Note: If you have not saved the template in RTF format, it may prompt you to save the template in RTF format first before publishing.

2. The **Upload as new** dialog box appears.
Enter **Template1** as the template name, and click **OK**.



After the template is uploaded, it displays the following message indicating that the template is added to the BI Publisher report. Click **OK** again.



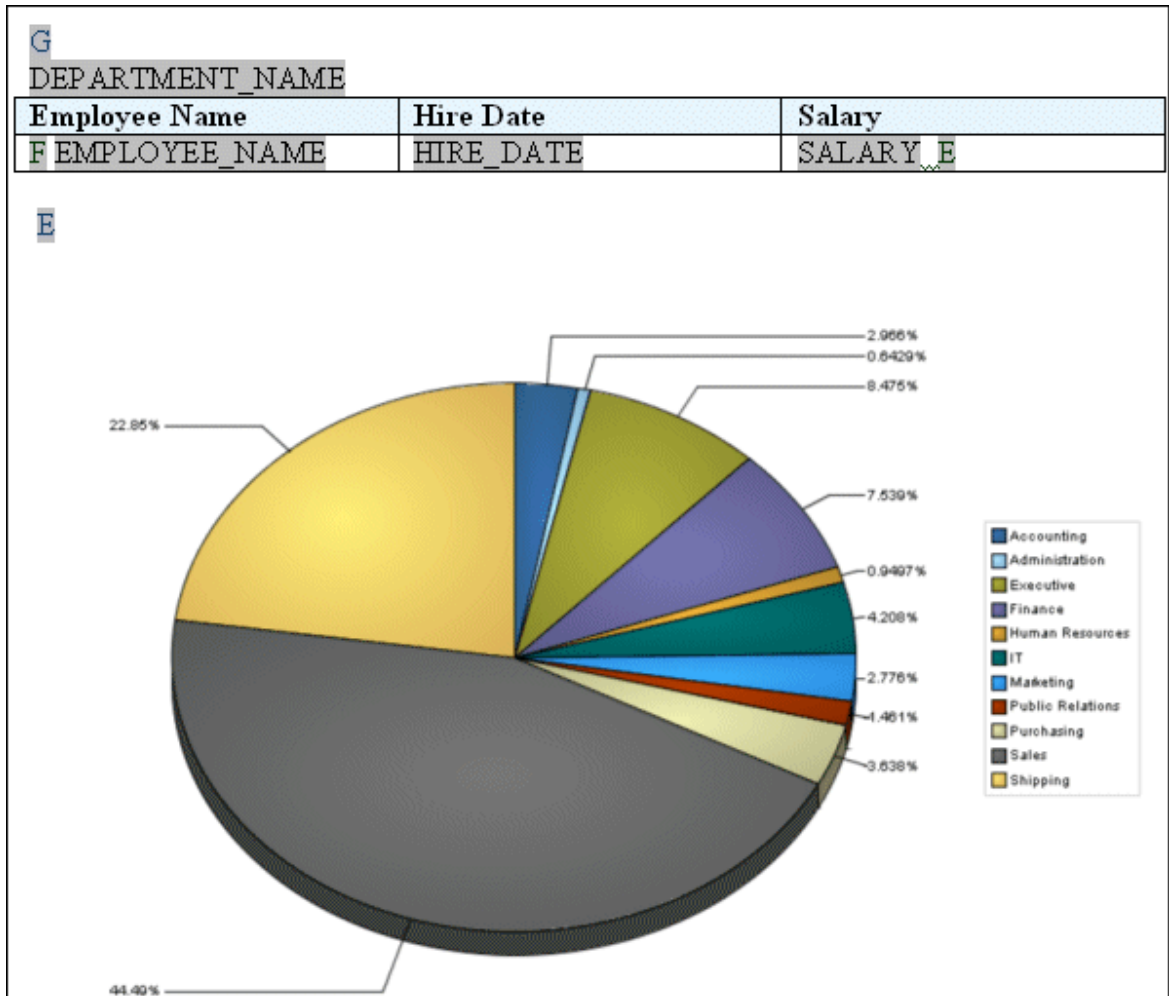
[Back to Topic](#)

Formatting the Template Using MS Word Native Features



In this topic, you will modify the **Based_On_OracleDB.rtf** template that you have created using the MS Word native features, such as changing the background and text colors, adding a title, and so on.

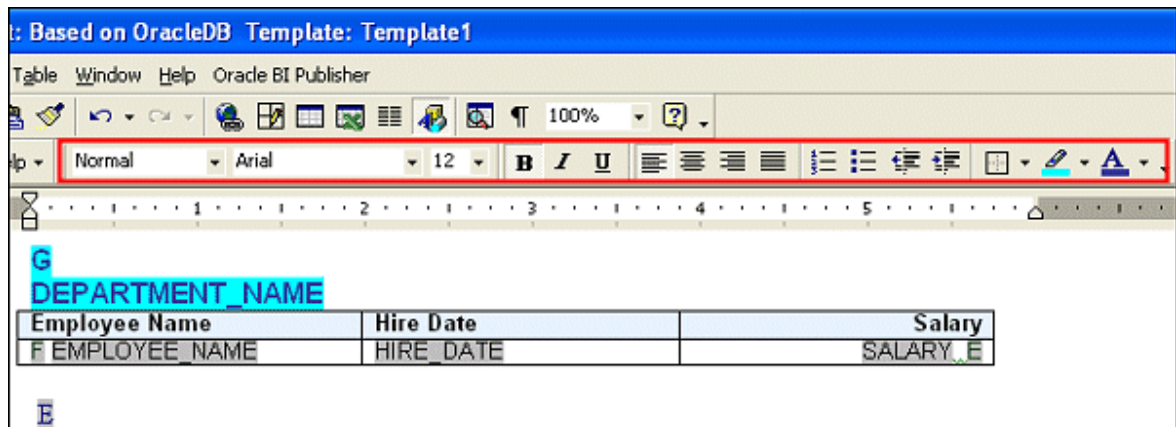
Perform the following steps:

1. The basic **Based_On_OracleDB.rtf** template that you have created is shown below:



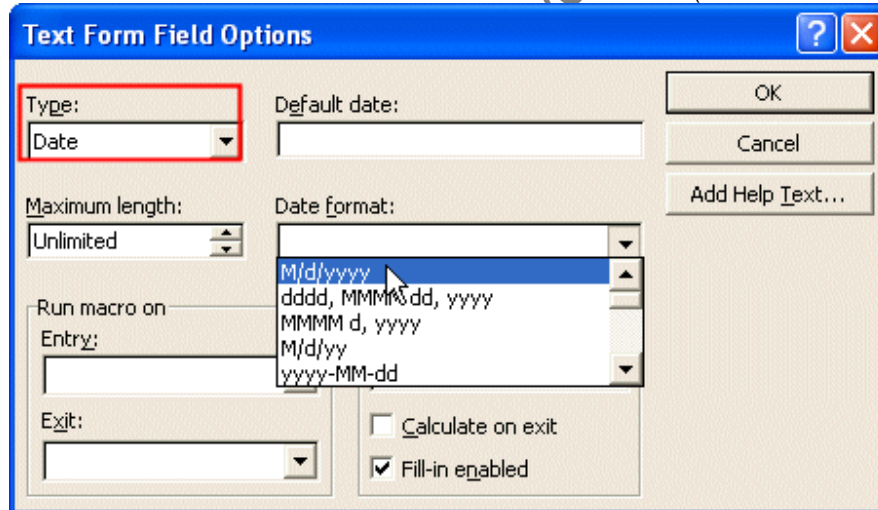
Make the following changes using the MS Word features:

1. Change the fonts for all the fields, that is **Department Name**, **Employee Name**, **Hire Date**, and **Salary** to **Arial**.
2. Select 12 as the font size for the **Department Name**, and 10 as the font size for other fields.
3. Change the text color for the **Department Name** field to dark blue, highlight the background for this field by cyan, and make it Bold.
4. Also ensure that the **Employee Name** and **Hire Date** (text and date fields) are left justified, and the **Salary** (Number) field is right justified. Use the align left  and align right  icons on the toolbar. The table in the template should look like the screen below after these changes:

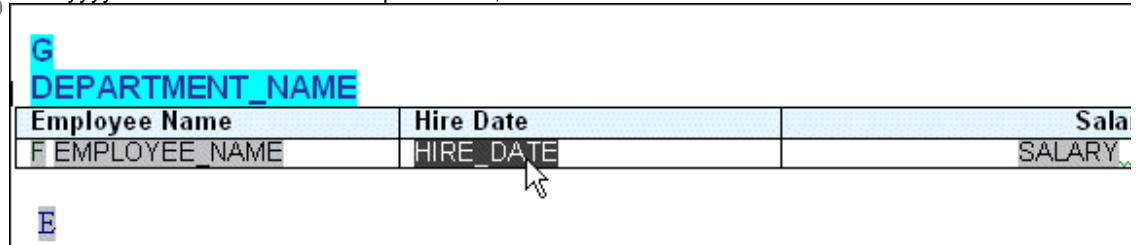


2. Edit the **Hire Date** field to add the appropriate format as follows:

1. Double-click the text field for **Hire Date** below the column header. (See the screen below.)



2. In the **Text Form Field Options** dialog box that appears, select **Date** from the **Type** drop-down list, select **m/d/yyyy** from the **Date format** drop-down list, and click **OK**.



3. Similarly, edit the **Salary** field now to add an appropriate format as follows:

1. Double click the **Salary** field below the column header.

G

DEPARTMENT_NAME

Employee Name	Hire Date	Salary
F EMPLOYEE_NAME		SALARY

E

2. In the **Text Form Fields** dialog box that appears, select **Number** from the **Type** drop-down list, enter the **Default Number** as 99,999,999.99, select the format that has a \$ in the beginning as shown, and click **OK**.

Text Form Field Options

Type: **Number**

Default number: 99,999,999.99

Maximum length: Unlimited

Number format: \$#,##0.00;(\$#,##0.00)

Run macro on Entry:

Exit:

☐ Calculate on exit

☒ Fill-in enabled

OK

Cancel

Add Help Text...

Now the table in the template should look like this:

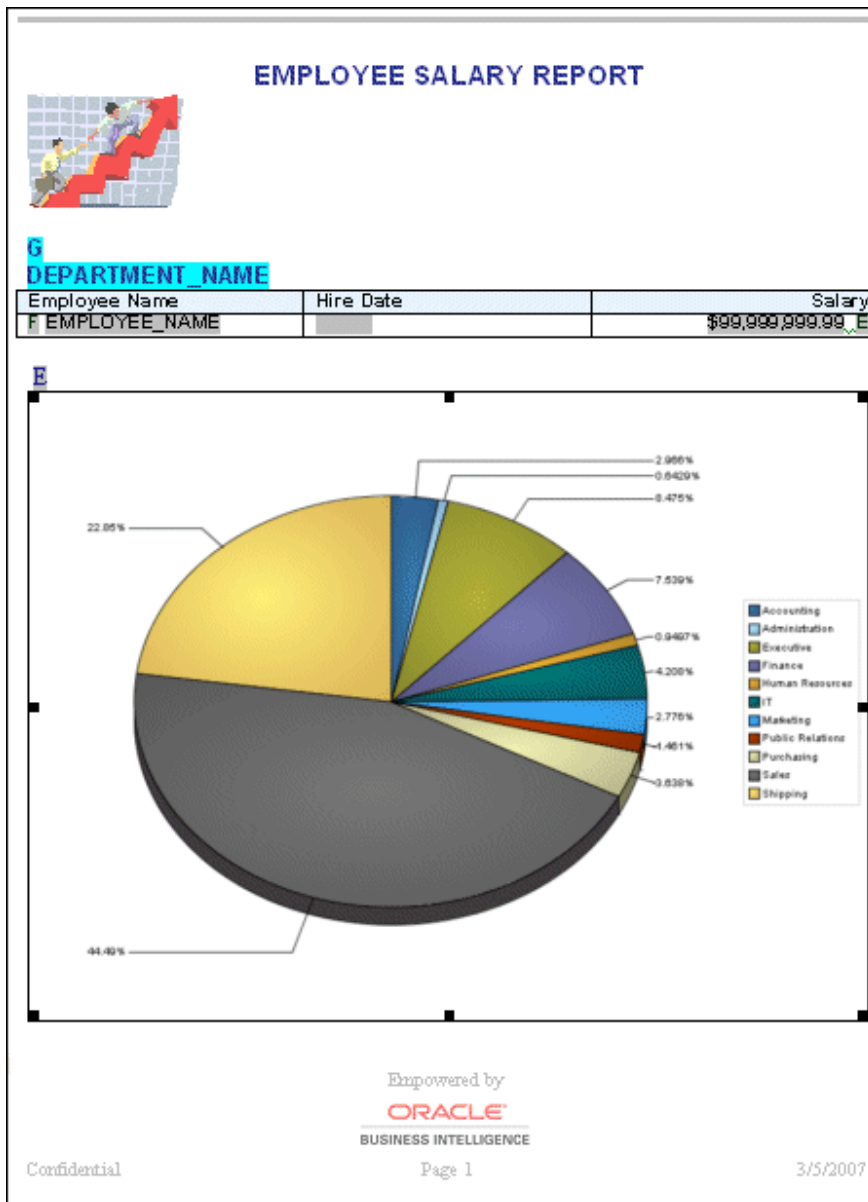
G

DEPARTMENT_NAME

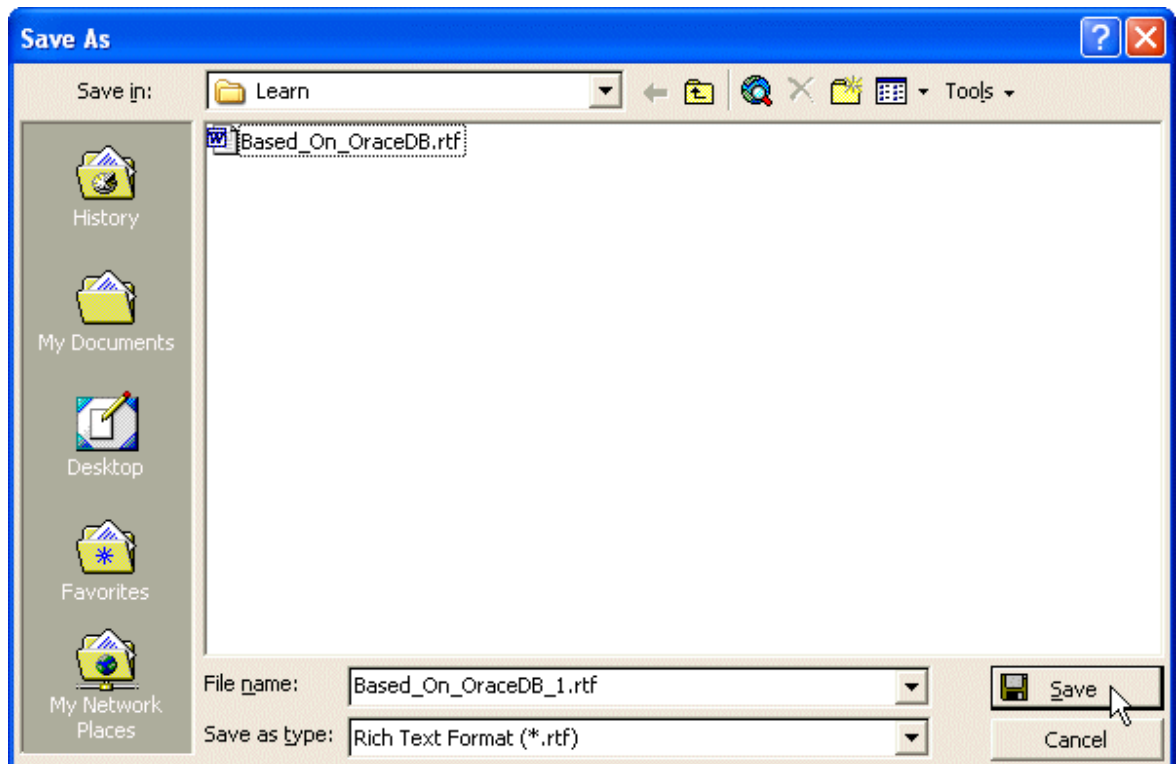
Employee Name	Hire Date	Salary
F EMPLOYEE_NAME		\$99,999,999.99

E

4. Add a title **Employee Salary Report** to the template, and format the text color and fonts as you require. You can also add an image or a clip art to the template. (Resize it to fit your template better.) You can also insert a header or footer in template. Observe the following screen:



5. Save the file as **Based_On_OracleDB_1.rtf**.
(Do not close the file or log out of BI Publisher.)



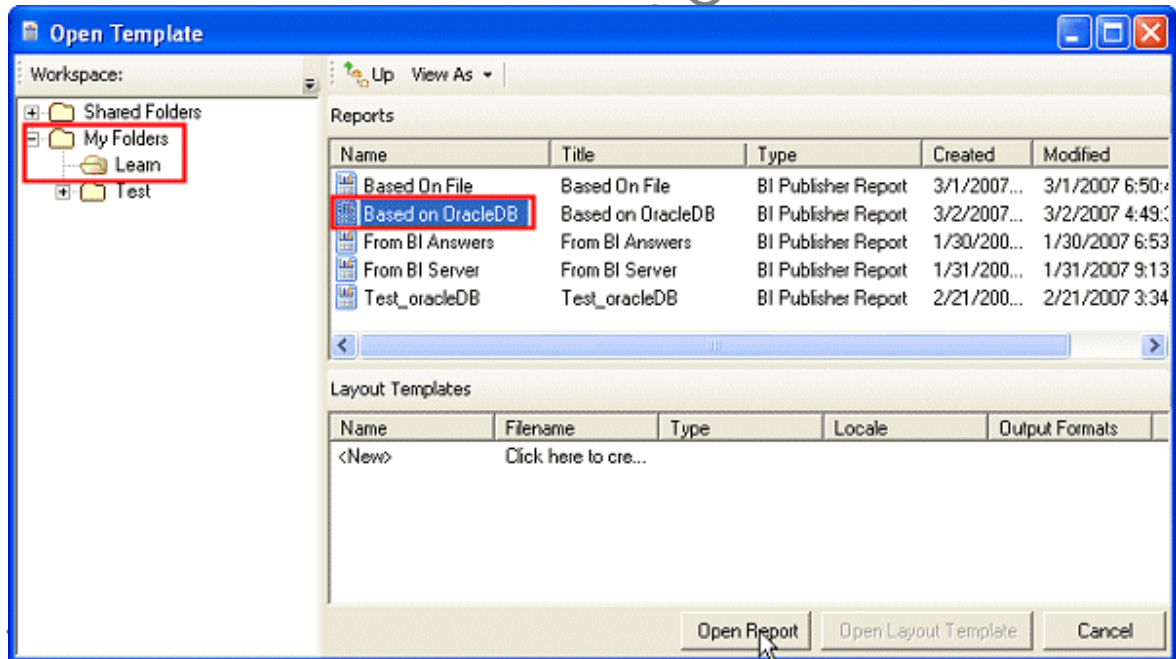
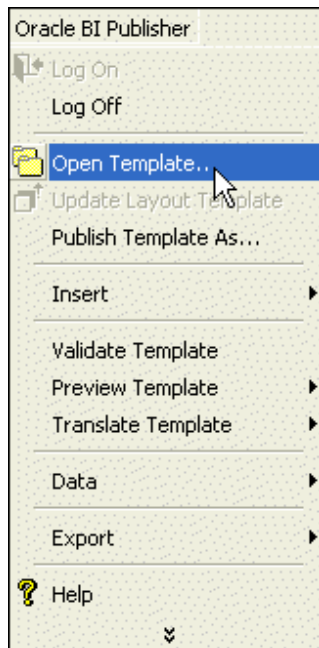
[Back to Topic](#)

Creating and Publishing Multiple Templates for a BI Publisher Report

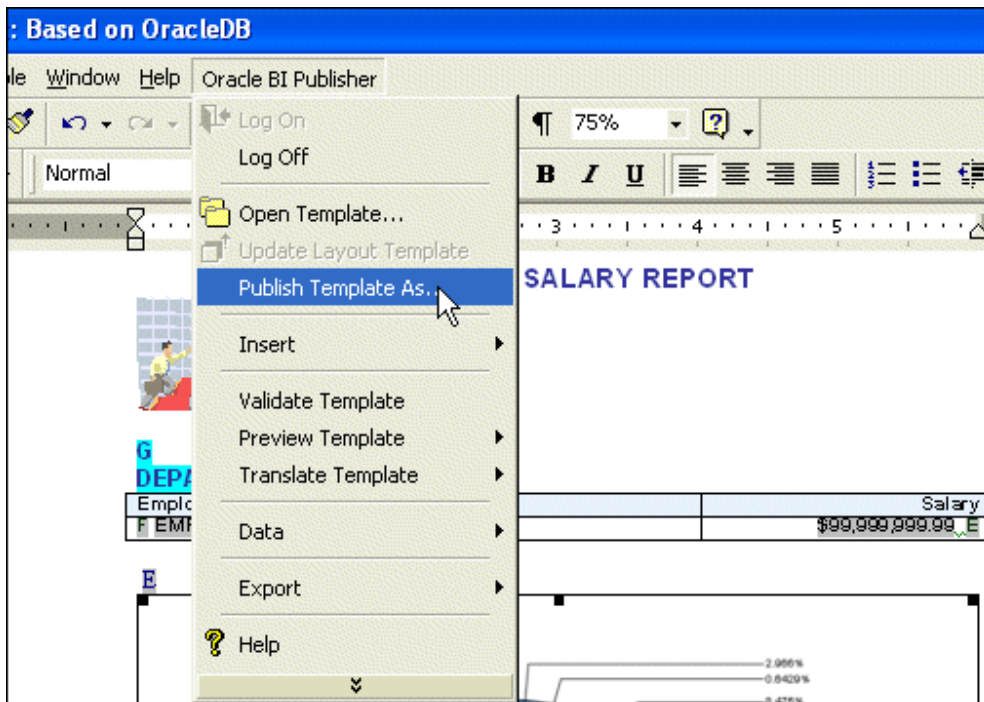
In the previous topic, you have already created another template **Based_On_OracleDB_1.rtf** for the **Based on Oracle DB** report, for which you have already published a simple template. You can create many templates with different formats and styles, and publish them for a single report.

To publish the **Based_On_OracleDB_1.rtf** template created from MS Word, perform the following steps:

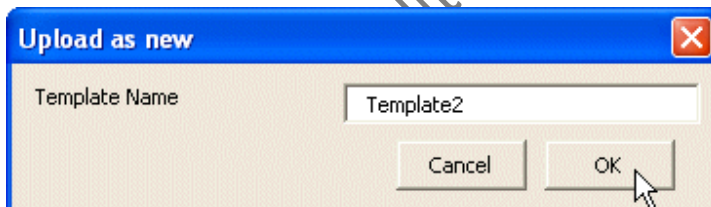
1. (If not already opened) Open the **Based on OracleDB** BI Publisher report as follows:
In MS Word, select the **BI Publisher> Open Template** option.
Open the **Based on OracleDB** report from the path **My Folders>Learn**.



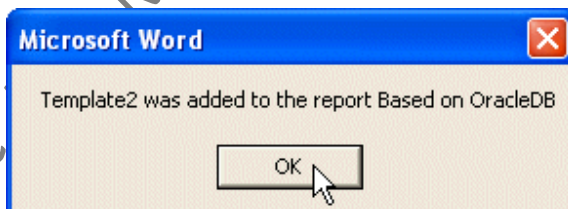
2. In MS Word, select the **Oracle BI Publisher> Publish Template As** option.



3. This opens the **Upload as new** dialog box. Enter **Template2** as the template name, and click **OK**.

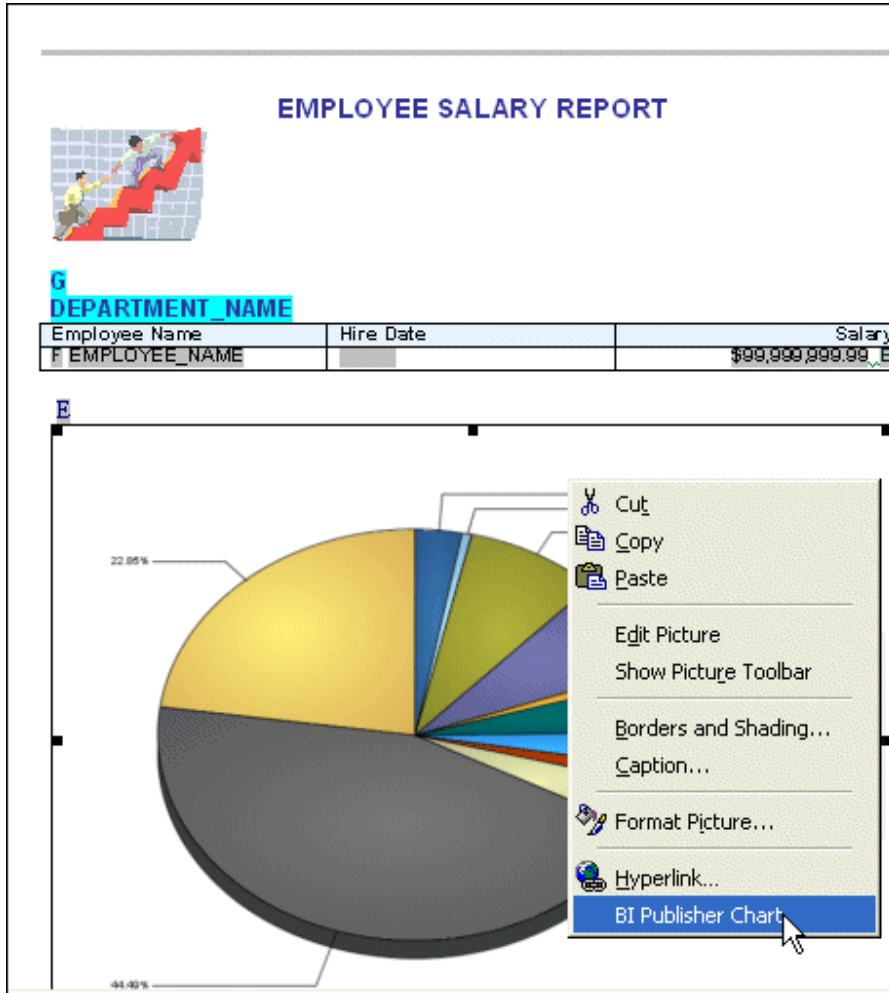


After the template is uploaded, it displays the following message. Click **OK** again.

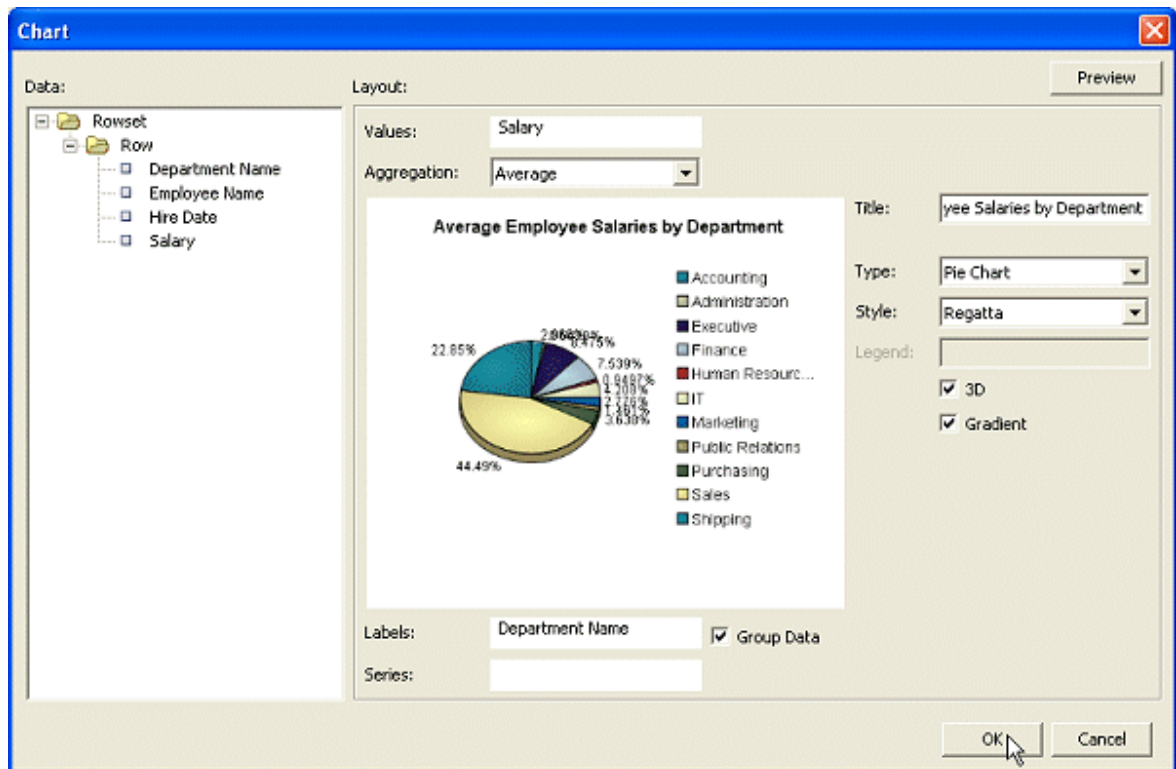


Note: You have added two different templates for the same report **Based on OracleDB**. You can modify the template file, and publish it as different template each time you modify.

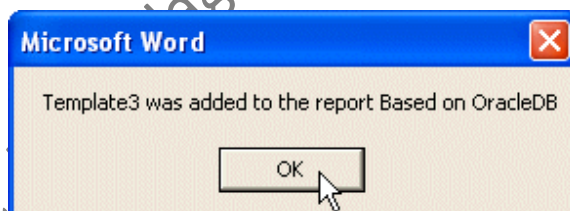
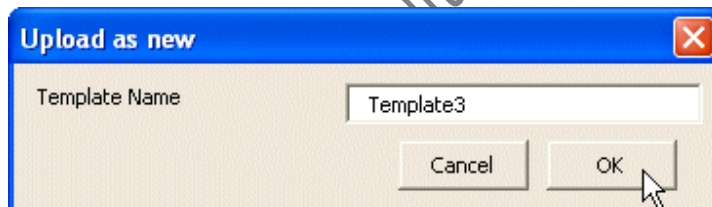
4. If you have time, perform the following steps to edit the chart in the template file to change the graph style, and publish it as Template3:
Right-click the chart in the template and select **BI Publisher Chart** to edit the chart:



Ensure that **Average** is selected as the **Aggregation** for the **Salary**, select **Regatta** as the graph **Style**, and add **Average Employee Salaries by Department** as the **Title**.
Click **Preview**, and then click **OK**.



5. Select the **Oracle BI Publisher> Publish Template As** option, and publish the modified template as **Template3** (as shown in the screens below):



[Back to Topic](#)

Viewing Report Data in BI Publisher Using Templates

1. (If not logged in) Log in to Oracle BI Publisher as **Administrator**.

ORACLE® BI Publisher Enterprise

Username Administrator

Please contact administrator for your username/password.

Password

Sign In

☐ Accessibility Mode

English

2. Navigate to **My Folders>Learn**, and click the **View** link below the **Based on OracleDB** report.

BI Publisher Enterprise

Welcome, administrator Sign Out Preferences Help

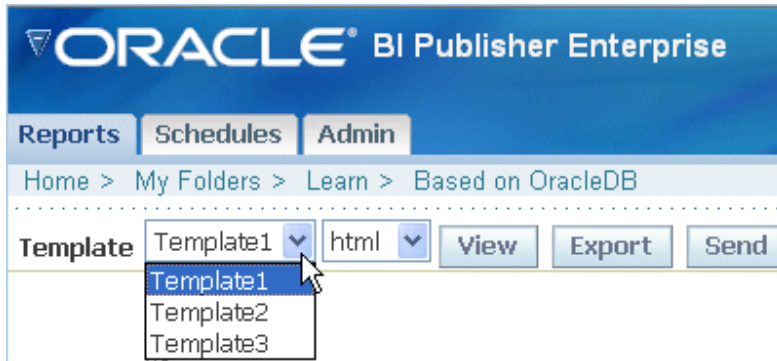
Based On File

Date
Modified 3/1/07 6:50 PM Calcutta
[View](#) [Schedule](#) [History](#) [Edit](#)
[Configure](#)

Based on OracleDB

Date
Modified 3/5/07 9:29 PM Calcutta
[View](#) [Schedule](#) [History](#) [Edit](#)
[Configure](#)

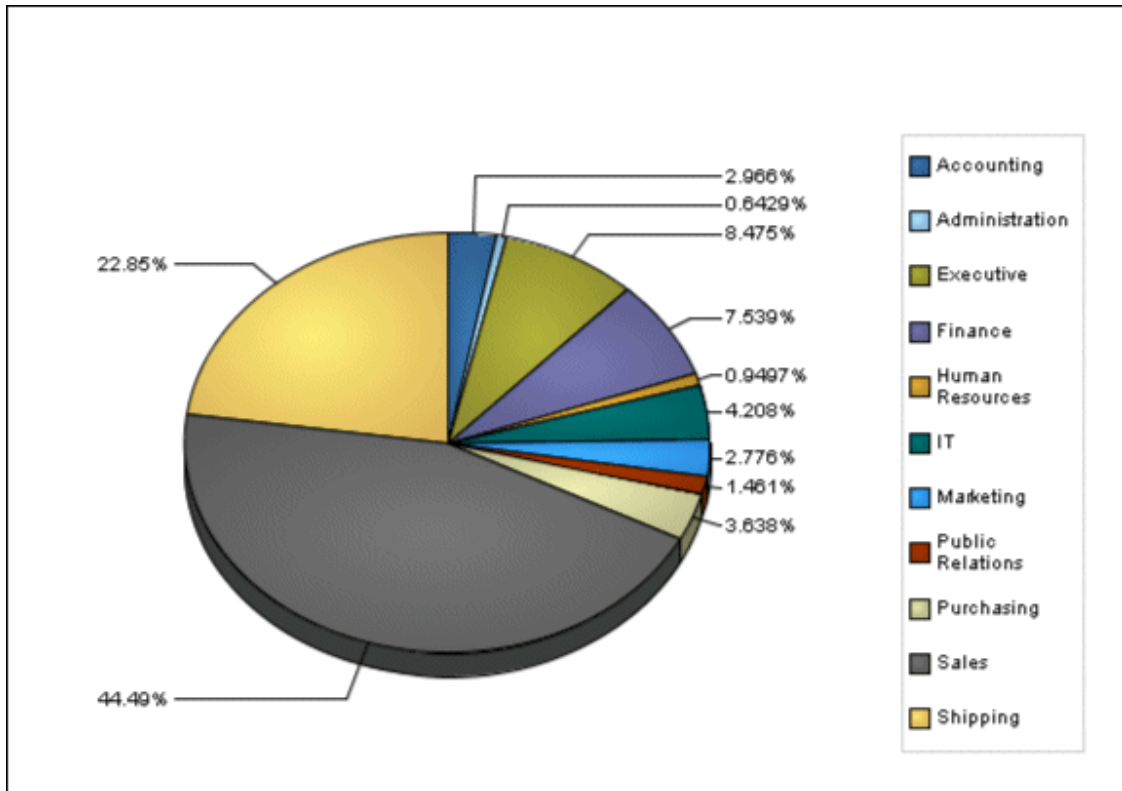
3. You can see that the report is displayed using **Template1** that you have published. Also, you can see the other templates that you have published for the report in the drop-down list.



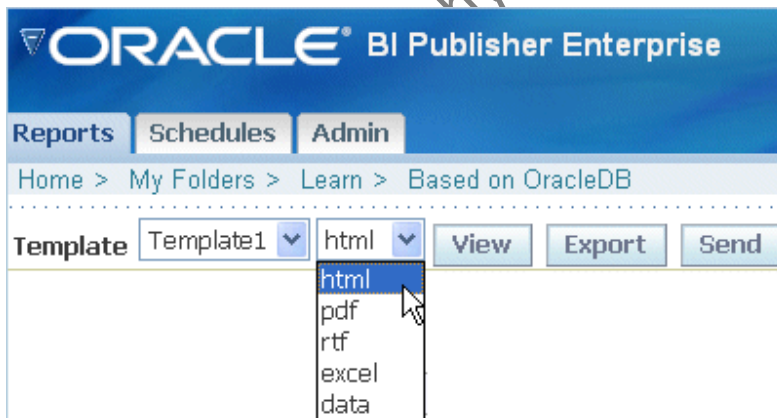
Scroll down to see the table data in HTML format. A portion of the data is shown below:

ORACLE® BI Publisher Enterprise		
Reports	Schedules	Admin
Home > My Folders > Learn > Based on OracleDB		
Template	Template1	html
View	Export	Send
Schedule		
Accounting		
Employee Name	Hire Date	Salary
ShelleyHiggins	1994-06-07T00:00:00.000+05:30	12000
WilliamGietz	1994-06-07T00:00:00.000+05:30	8300
Administration		
Employee Name	Hire Date	Salary
JenniferWhalen	1987-09-17T00:00:00.000+05:30	4400
Executive		
Employee Name	Hire Date	Salary
StevenKing	1987-06-17T00:00:00.000+05:30	24000
NeenaKochhar	1989-09-21T00:00:00.000+05:30	17000
LexDe Haan	1993-01-	17000

Scroll down to see the graph:



Note: You can also view the data in other formats, such as PDF, RTF, MS Excel, and so on.



4. Similarly, view the report data in PDF format using Template2 and Template3.


The data and graph in **PDF** format using **Template2** are shown below:

My Folders > Learn > Based on OracleDB

Template2 pdf View Export Send Schedule Analyzer Ana

Copy Print Search Select 100%

EMPLOYEE SALARY REPORT



Accounting

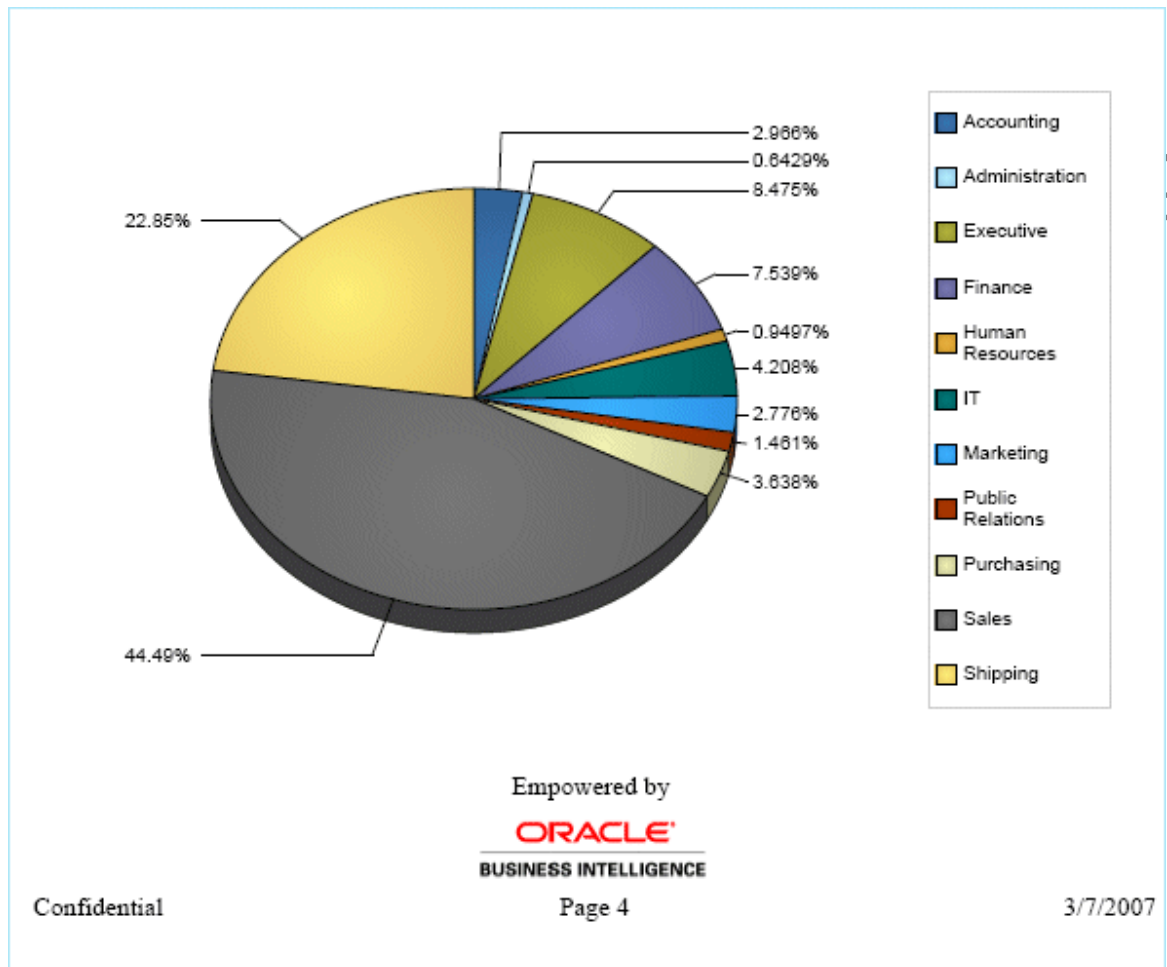
Employee Name	Hire Date	Salary
Shelley Higgins	6/7/1994	\$12,000.00
William Gietz	6/7/1994	\$8,300.00

Administration

Employee Name	Hire Date	Salary
Jennifer Whalen	9/17/1987	\$4,400.00

Executive

Employee Name	Hire Date	Salary
Steven King	6/17/1987	\$24,000.00
Neena Kochhar	9/21/1989	\$17,000.00
Lex De Haan	1/13/1993	\$17,000.00




The data and graph in PDF format using Template3 are shown below:

me > My Folders > Learn > Based on OracleDB

Template3 pdf View Export Send Schedule Analyzer

Save a Copy Search Select 100%

EMPLOYEE SALARY REPORT



Accounting

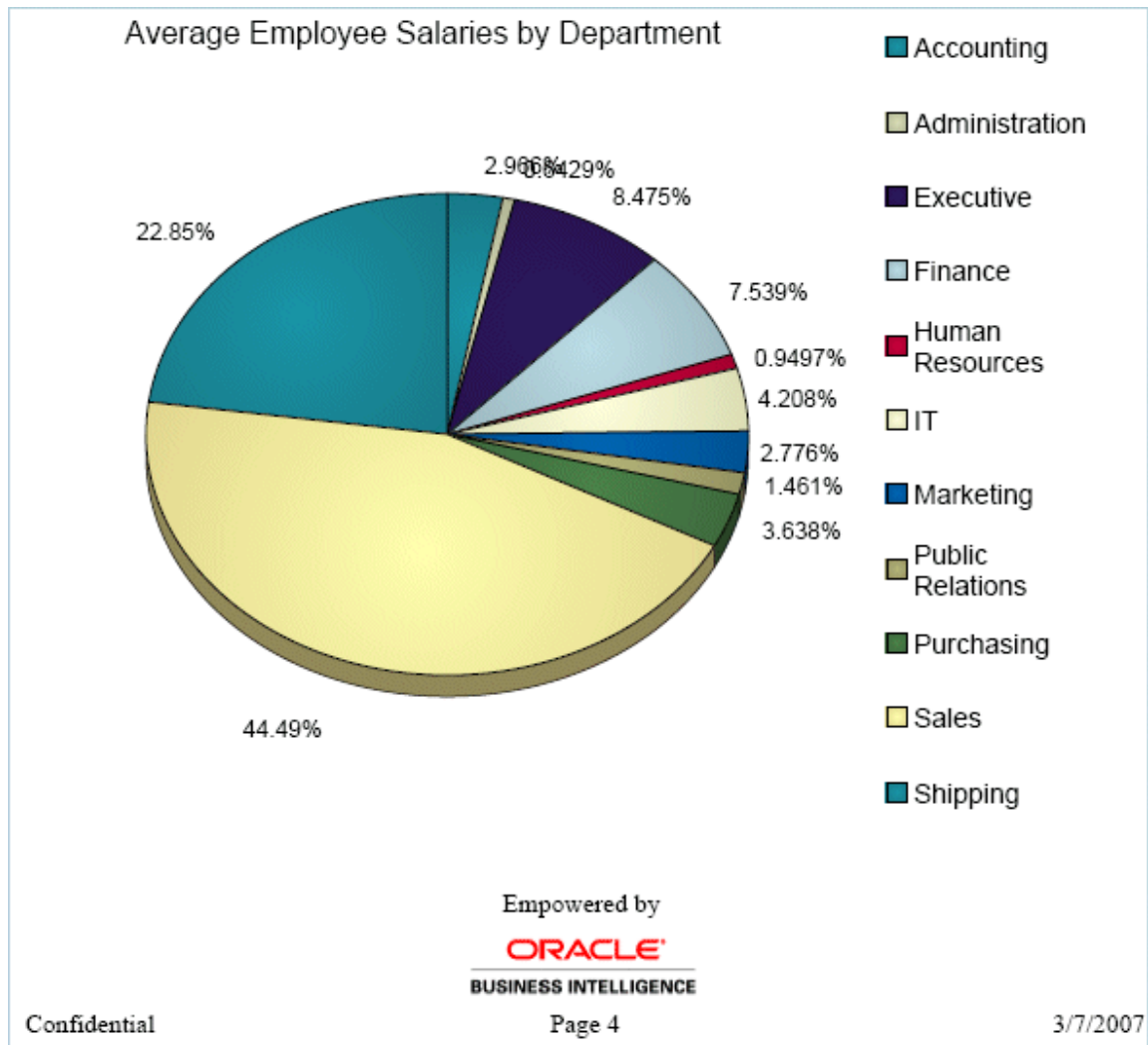
Employee Name	Hire Date	Salary
Shelley Higgins	6/7/1994	\$12,000.00
William Gietz	6/7/1994	\$8,300.00

Administration

Employee Name	Hire Date	Salary
Jennifer Whalen	9/17/1987	\$4,400.00

Executive

Employee Name	Hire Date	Salary
Steven King	6/17/1987	\$24,000.00
Neena Kochhar	9/21/1989	\$17,000.00
Lex De Haan	1/13/1993	\$17,000.00



[Back to Topic](#)


[Back to Topic List](#)

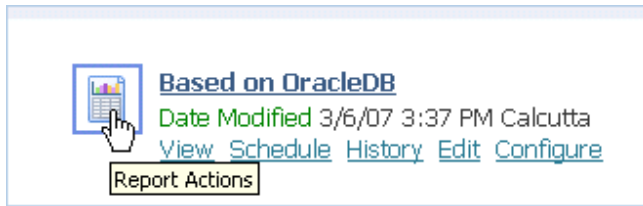
Creating a Report with Parameters and List of Values

In this topic, you create a report with parameters and list of values.

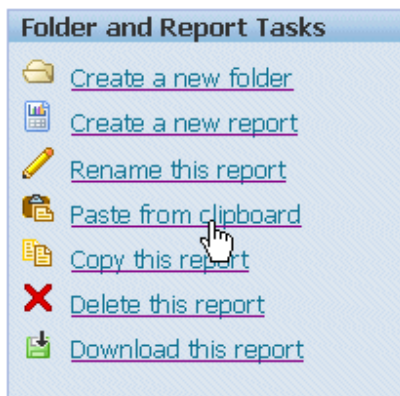
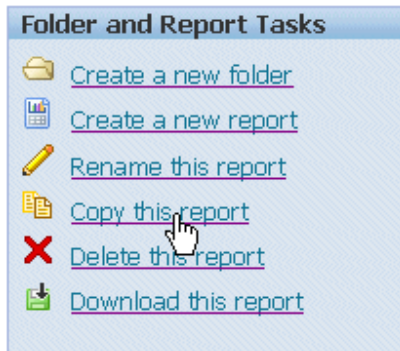
To create a report with parameters and list of values, perform the following steps:

1. (If not logged in) Log in to BI publisher as **Administrator**, and navigate to **My Folders> Learn**.

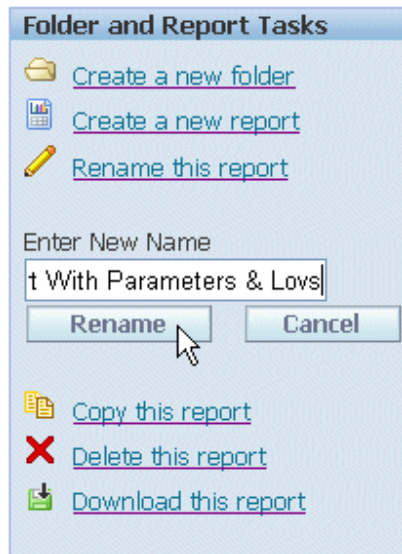
Click the report  icon beside the **Based on OracleDB** report.



2. This displays additional report actions in **Folder and Report Tasks**.
Click **Copy Report** and then click **Paste from Clipboard** to paste it in the same folder. (See the screens below):



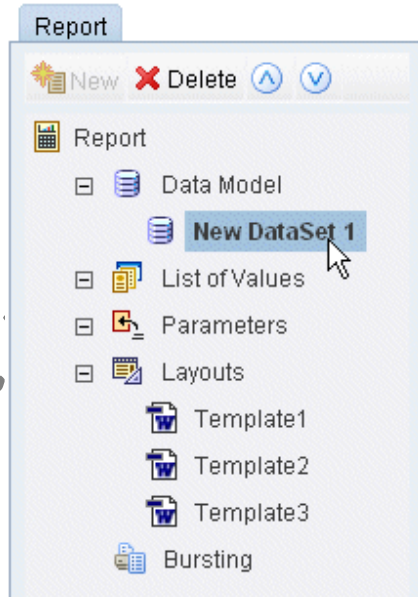
Rename this copied report **Report with Parameters and LOVs**.



3. Click the **Edit** link below the report to open the report in Edit mode.



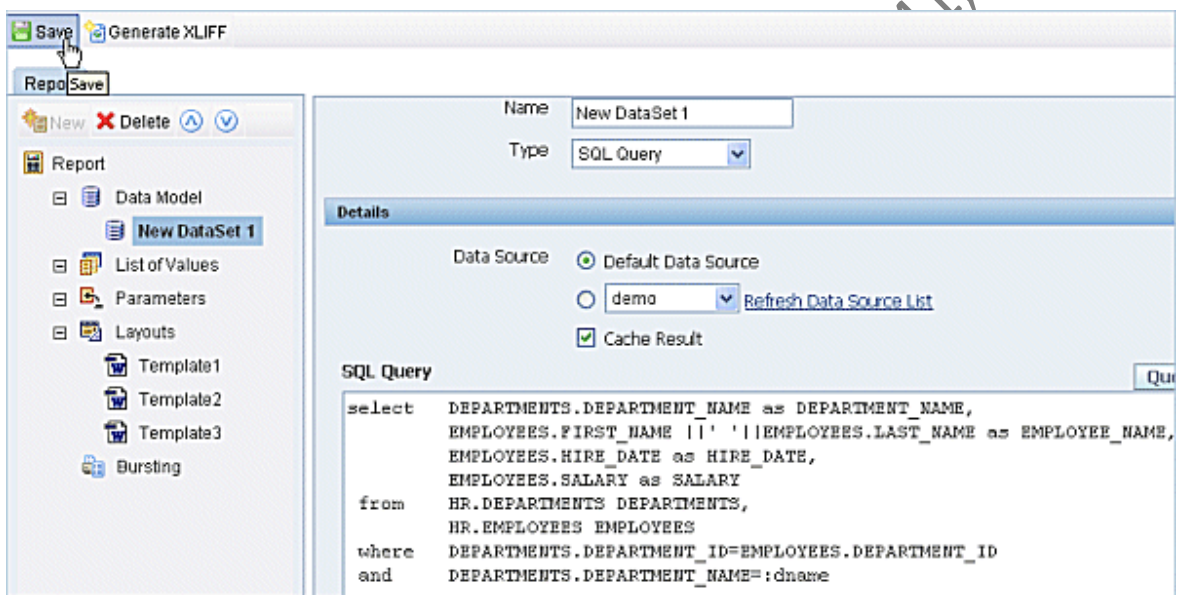
Click **New Data Set1** found under the **Data Model** node in the **Report** pane on the left to edit the SQL Query for the report. Observe the screen below:



4. This displays the SQL Query for the report on the right.
Edit the query to add a bind variable dname in the query as in the following: (Observe the last line.)

```
select DEPARTMENTS.DEPARTMENT_NAME as DEPARTMENT_NAME,  
EMPLOYEES.FIRST_NAME || ' ' || EMPLOYEES.LAST_NAME as EMPLOYEE_NAME,  
EMPLOYEES.HIRE_DATE as HIRE_DATE,  
EMPLOYEES.SALARY as SALARY  
from HR.DEPARTMENTS DEPARTMENTS,  
HR.EMPLOYEES EMPLOYEES  
where DEPARTMENTS.DEPARTMENT_ID=EMPLOYEES.DEPARTMENT_ID  
and DEPARTMENTS.DEPARTMENT_NAME=:dname
```

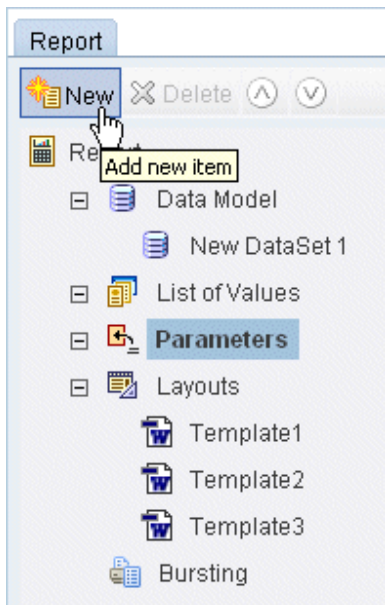
Click **Save**  to save the query.



The screenshot shows the Oracle BI Report Studio interface. On the left, the 'Report' tree is visible with 'New DataSet 1' selected. The main area shows the configuration for 'New DataSet 1'. The 'Name' field is 'New DataSet 1' and the 'Type' is 'SQL Query'. Under the 'Details' tab, 'Data Source' is 'Default Data Source', 'demo' is selected in the dropdown, and 'Cache Result' is checked. The 'SQL Query' text area contains the following query:


```
select DEPARTMENTS.DEPARTMENT_NAME as DEPARTMENT_NAME,  
EMPLOYEES.FIRST_NAME || ' ' || EMPLOYEES.LAST_NAME as EMPLOYEE_NAME,  
EMPLOYEES.HIRE_DATE as HIRE_DATE,  
EMPLOYEES.SALARY as SALARY  
from HR.DEPARTMENTS DEPARTMENTS,  
HR.EMPLOYEES EMPLOYEES  
where DEPARTMENTS.DEPARTMENT_ID=EMPLOYEES.DEPARTMENT_ID  
and DEPARTMENTS.DEPARTMENT_NAME=:dname
```

5. Click the **Parameters** node in the **Report** pane on the left and click **New** to create a parameter.



6. This displays the **Parameter** screen on the right, in which define the following:

Enter **dname** as the name of the parameter, and select **String** as the **Data Type**.
Enter **Sales** in the **Default Value** field, and select **Text** as the **Parameter Type**.
Also, enter **Enter Department Name** as the **Display Label**. (See the screen below.)

Click **Save**  to save the changes to the report.

The screenshot shows the 'Parameter' configuration screen. The 'General Settings' section contains the following fields:

- Identifier:
- Data Type: - Default Value:
- Parameter Type:

The 'Text Setting' section contains the following fields:

- Display Label:
- Text Field Size:

7. Click **View** to view the report data using **Template2** in PDF format.
Note that the report data is displayed with the default parameter value, that is for **Sales** department.


Report With Parameters and Lows View

Enter Department Name:

View **Export** **Send** **Schedule** **Analyzer** **Analyzer for Excel**

Search 100%

EMPLOYEE SALARY REPORT



Sales

Employee Name	Hire Date	Salary
John Russell	10/1/1996	\$14,000.00
Karen Partners	1/5/1997	\$13,500.00
Alberto Errazuriz	3/10/1997	\$12,000.00
Lisa Ozer	3/11/1997	\$11,500.00
Gerald Cambrault	10/15/1999	\$11,000.00
Ellen Abel	5/11/1996	\$11,000.00
Eleni Zlotkey	1/29/2000	\$10,500.00
Clara Vishney	11/11/1997	\$10,500.00
Peter Tucker	1/30/1997	\$10,000.00
Janette King	1/30/1996	\$10,000.00
Harrison Bloom	3/23/1998	\$10,000.00
Tayler Fox	1/24/1998	\$9,600.00
David Bernstein	3/24/1997	\$9,500.00
Patrick Sully	3/4/1996	\$9,500.00


8. You can enter the names of other departments to see the data.
For example, in the parameter field enter **Shipping** as the department name and click **View** again to see the data for the **Shipping** department:

Enter Department Name:

View Export Send Schedule Analyzer Analyzer for Excel

arch Select 100%

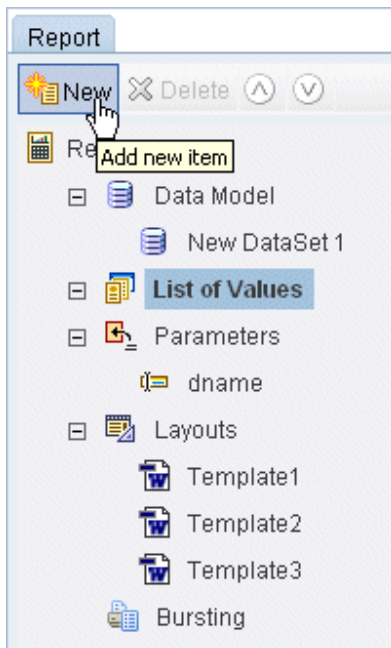
EMPLOYEE SALARY REPORT



Shipping

Employee Name	Hire Date	Salary
Adam Fripp	4/10/1997	\$8,200.00
Matthew Weiss	7/18/1996	\$8,000.00
Payam Kaufling	5/1/1995	\$7,900.00
Shanta Vollman	10/10/1997	\$6,500.00
Kevin Mourgous	11/16/1999	\$5,800.00
Nandita Sarchand	1/27/1996	\$4,200.00
Alexis Bull	2/20/1997	\$4,100.00
Sarah Bell	2/4/1996	\$4,000.00
Britney Everett	3/3/1997	\$3,900.00
Kelly Chung	6/14/1997	\$3,800.00
Renske Ladwig	7/14/1995	\$3,600.00
Jennifer Dilly	8/13/1997	\$3,600.00
Trenna Rajs	10/17/1995	\$3,500.00
Julia Dellinger	6/24/1998	\$3,400.00
Laura Bissot	8/20/1997	\$3,300.00

9. Click **Edit** to edit the report and define a List of Values to be used with this parameter **dname**. In the Report pane displayed on the left, click **List of Values**, and click **New** to create a new list of values.



10. In the **List of Values** screen that appears on the right, ensure that **demo** is selected as the **Data Source**, and click **Query Builder** to define a query for defining a list of values.

11. In the **Query Builder** screen that displays the **HR** schema tables on the left, click **DEPARTMENTS** to add it to the **Model** canvas on the right, and select **DEPARTMENT_NAME** column (by selecting the check box beside it). Click **Save**.

Query Builder - Microsoft Internet Explorer


Schema: HR

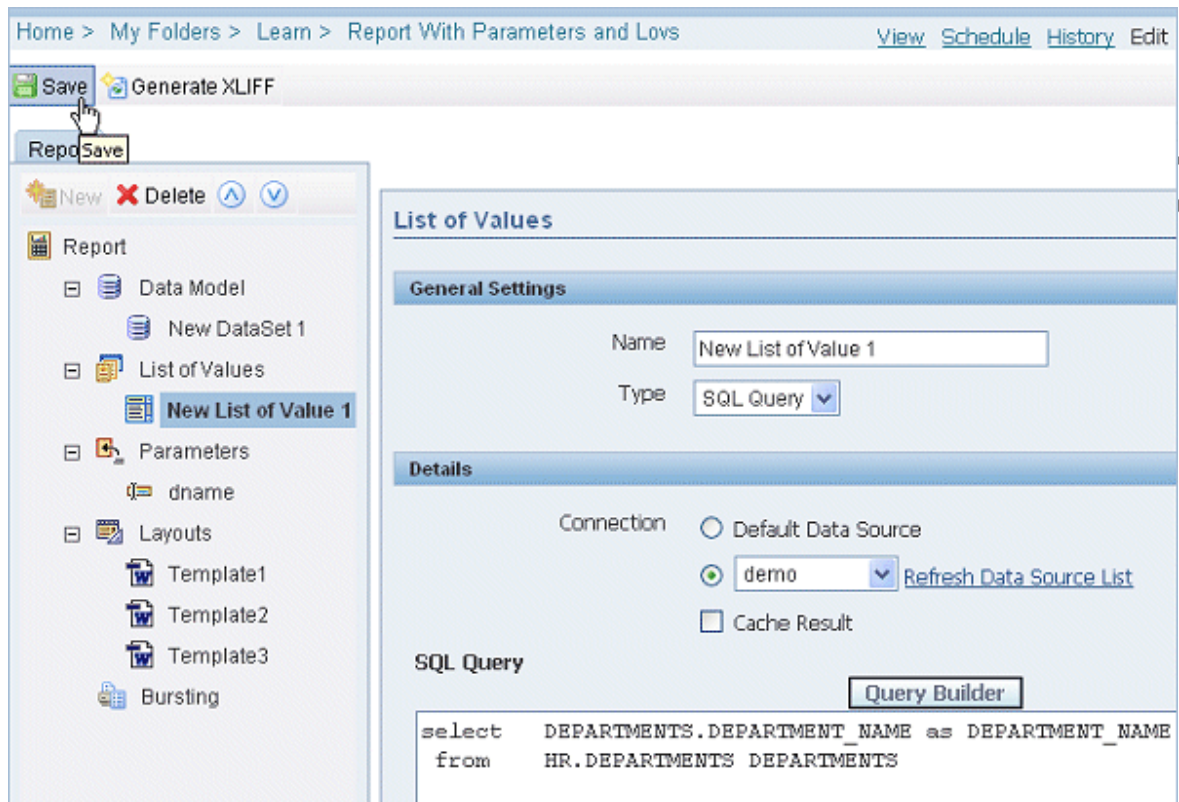
Search:

Model Conditions SQL Results 10 Cancel Save

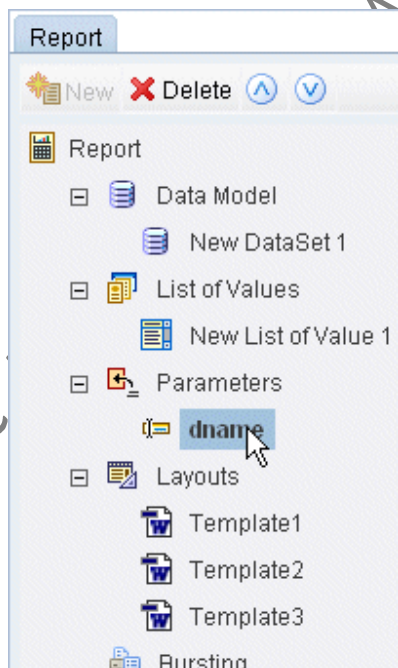
DEPARTMENTS	
<input type="checkbox"/> DEPARTMENT_ID	789
<input checked="" type="checkbox"/> DEPARTMENT_NAME	A
<input type="checkbox"/> MANAGER_ID	789
<input type="checkbox"/> LOCATION_ID	789

This takes you back to the **List of Values** screen again which displays the query.

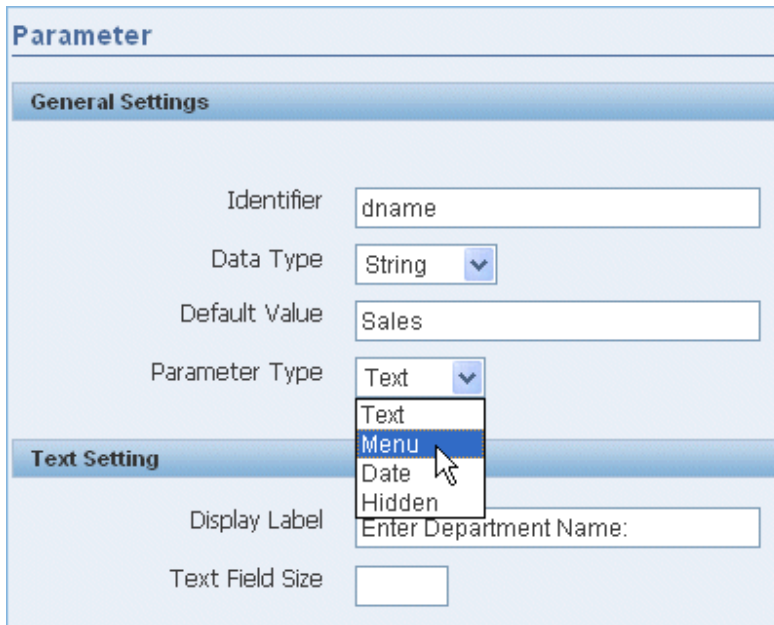
Click **Save**  to save the changes to report:



12. Click **dname** under the **Parameters** node in the **Report** pane on the left to edit it and associate it with the List of Values that you have created:



13. In the **Parameter** screen that appears on the right, select **Menu** as the **Parameter Type**.



Parameter

General Settings

Identifier:

Data Type:

Default Value:

Parameter Type:

Text Setting

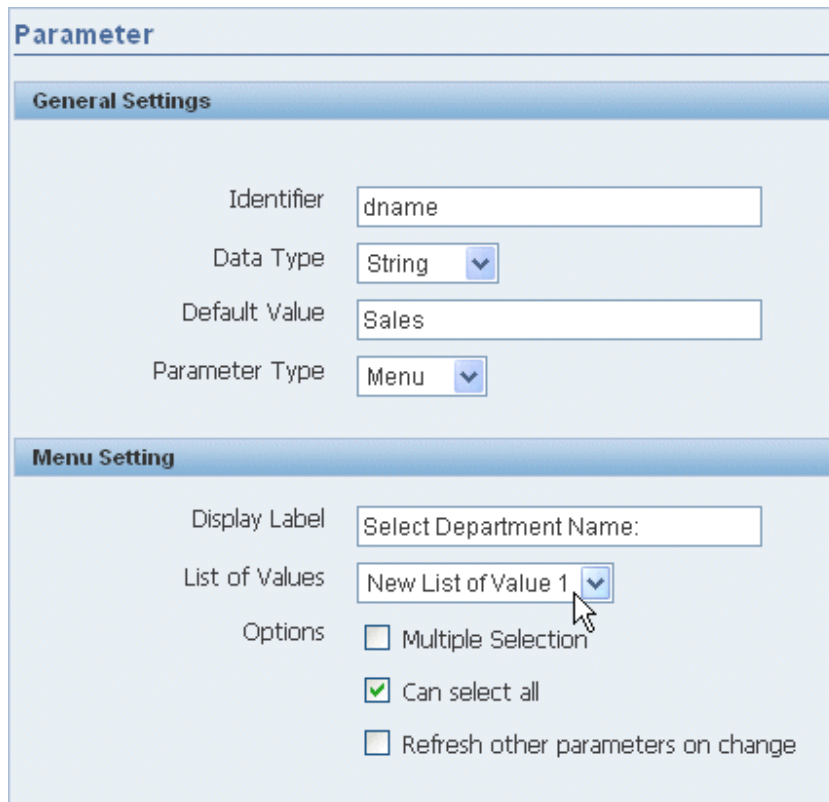
Display Label:

Text Field Size:

In the **Menu Setting** section that appears below the **General Settings** section, enter **Select Department Name:** in the **Display Label** field, and ensure that the **New List of Values 1** (that you created) is selected from the **List of Values** drop-down list.

Also, select the **Can select all** option to be able to see the data for all the departments.

Click **Save**  to save the report.



The screenshot shows a 'Parameter' configuration window with two tabs: 'General Settings' and 'Menu Setting'. In the 'General Settings' tab, the 'Identifier' is 'dname', 'Data Type' is 'String', 'Default Value' is 'Sales', and 'Parameter Type' is 'Menu'. In the 'Menu Setting' tab, the 'Display Label' is 'Select Department Name:', the 'List of Values' is 'New List of Value 1', and the 'Options' section has 'Multiple Selection' unchecked, 'Can select all' checked, and 'Refresh other parameters on change' unchecked.

Parameter	
General Settings	
Identifier	dname
Data Type	String
Default Value	Sales
Parameter Type	Menu
Menu Setting	
Display Label	Select Department Name:
List of Values	New List of Value 1
Options	<input type="checkbox"/> Multiple Selection <input checked="" type="checkbox"/> Can select all <input type="checkbox"/> Refresh other parameters on change

14. Click **View** to view the report using Template2 in PDF format. Observe that the dname parameter is now displayed in the report using the list of values for the department name that you have defined:

Report With Parameters and Lows

Select Department Name: Sales

View Export Send Schedule

Search Select

Analyzer for Excel

EMPLOYEE SALES

Sales

Employee Name	Hire Date	Salary
John Russell	10/1/1996	\$14,000.00
Karen Partners	1/5/1997	\$13,500.00
Alberto Errazuriz	3/10/1997	\$12,000.00
Lisa Ozer	3/11/1997	\$11,500.00
Gerald Cambault	10/15/1999	\$11,000.00
Ellen Abel	5/11/1996	\$11,000.00
Eleni Zlotkey	1/29/2000	\$10,500.00
Clara Vishney	11/11/1997	\$10,500.00
Peter Tucker	1/30/1997	\$10,000.00
Janette King	1/30/1996	\$10,000.00
Harrison Bloom	3/23/1998	\$10,000.00

Note: You can select any of the departments from the drop-down list to view the data for that department or select **All** to view the data for all departments.

[Back to Topic List](#)

Scheduling BI Publisher Reports

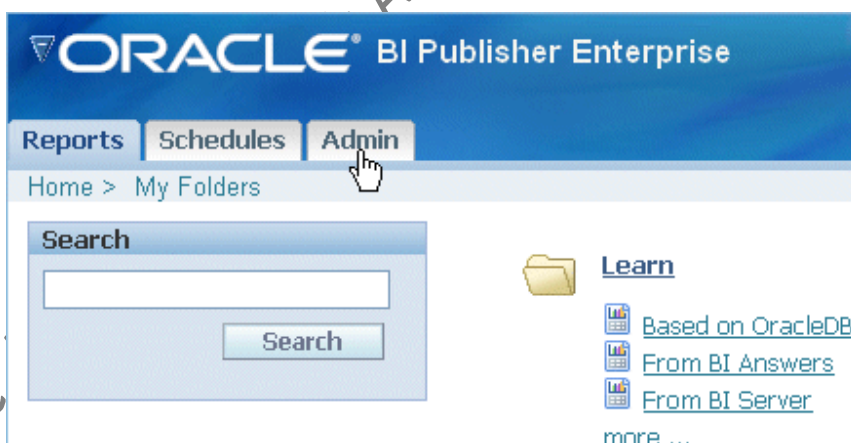
Scheduling is a very important feature for any reporting system, which enables you to schedule long-running reports, to be run at a specified time and date. This enables you to select a time and date at which the load on the system is low, to run your daily/weekly and/or monthly reports. In this topic, you configure the BI Publisher scheduler to schedule the reports and view the report history and saved output.

- ☐ [Configuring the BI Publisher Scheduler](#)

☐ Scheduling and Viewing Saved Output

Configuring the BI Publisher Scheduler

1. Log in (if not logged in) to **BI Publisher (Web)** as **Administrator** (password **Administrator**). Click **Admin** to go to the Admin tabbed page.



Note: You can log in to BI Publisher by entering the URL (in the following format) in the browser:
`http://<host>:9704/xmlpserver/`

2. On the Admin tabbed page, click the **Scheduler Configuration** link in the **System Maintenance** section.



3. On the **Scheduler Configuration** page:

- Select **Oracle 10g** from the Database Type drop-down list.
- Enter **Connection String** in the format: jdbc:oracle:thin:@<Host name>: <Port>:<SID> for example, a sample connection string may look like: jdbc:oracle:thin:@myhost:1521:orcl.
- Enter bipsched as the **Username** and **Password** (this is the scheduler user that you must have created as per Step 4 of the prerequisites).
- Ensure that **oracle.jdbc.driver.OracleDriver** is selected as **Database Driver Class**.
- Click **Test Connection**.

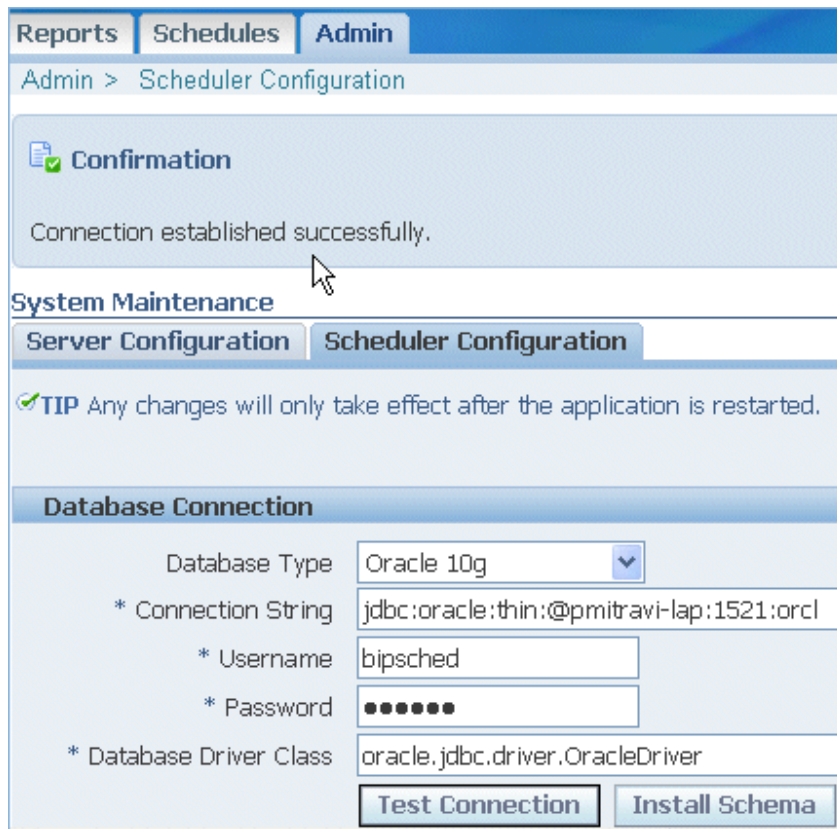


The screenshot shows the Oracle BI Publisher Enterprise Admin console. The top navigation bar includes 'Reports', 'Schedules', and 'Admin'. The 'Admin' tab is selected, and the breadcrumb trail is 'Admin > Scheduler Configuration'. The page title is 'System Maintenance' with sub-tabs for 'Server Configuration' and 'Scheduler Configuration'. A tip states: 'Any changes will only take effect after the application is restarted.' The 'Database Connection' section contains the following fields:

Database Connection	
Database Type	Oracle 10g
* Connection String	jdbc:oracle:thin:@pmitravi-lap:1521:orcl
* Username	bipsched
* Password	••••••••
* Database Driver Class	oracle.jdbc.driver.OracleDriver

At the bottom of the form are two buttons: 'Test Connection' and 'Install Schema'. A mouse cursor is pointing at the 'Test Connection' button.

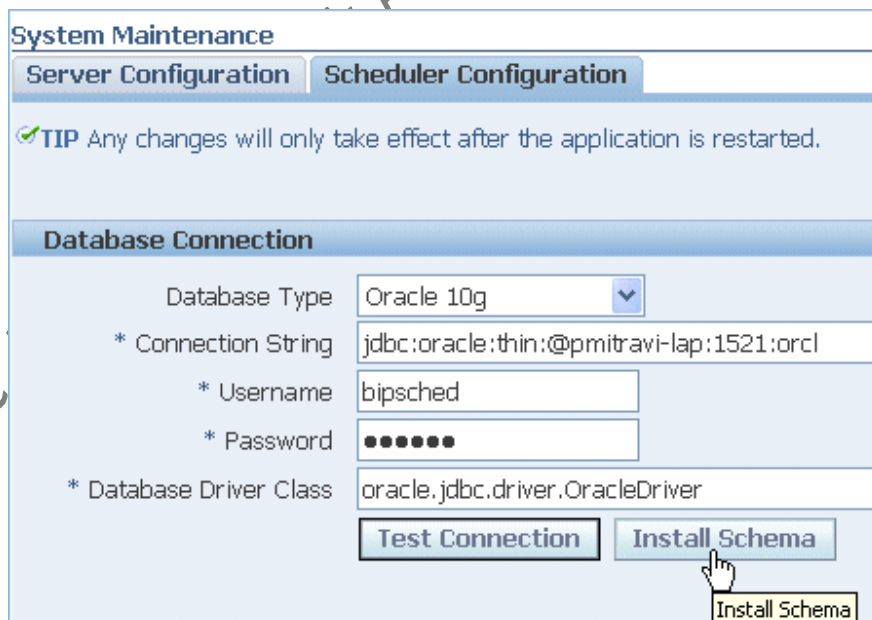
This should display the following message indicating that the connection was successful:



The screenshot shows the 'Admin' tab selected in the top navigation bar. Below it, the breadcrumb 'Admin > Scheduler Configuration' is visible. A 'Confirmation' message states 'Connection established successfully.' Below this, the 'System Maintenance' section has two tabs: 'Server Configuration' and 'Scheduler Configuration'. A tip indicates that changes will only take effect after a restart. The 'Database Connection' section contains fields for 'Database Type' (Oracle 10g), 'Connection String' (jdbc:oracle:thin:@pmitravi-lap:1521:orcl), 'Username' (bipsched), 'Password' (masked with dots), and 'Database Driver Class' (oracle.jdbc.driver.OracleDriver). At the bottom are 'Test Connection' and 'Install Schema' buttons.

Database Connection	
Database Type	Oracle 10g
* Connection String	jdbc:oracle:thin:@pmitravi-lap:1521:orcl
* Username	bipsched
* Password	••••••
* Database Driver Class	oracle.jdbc.driver.OracleDriver

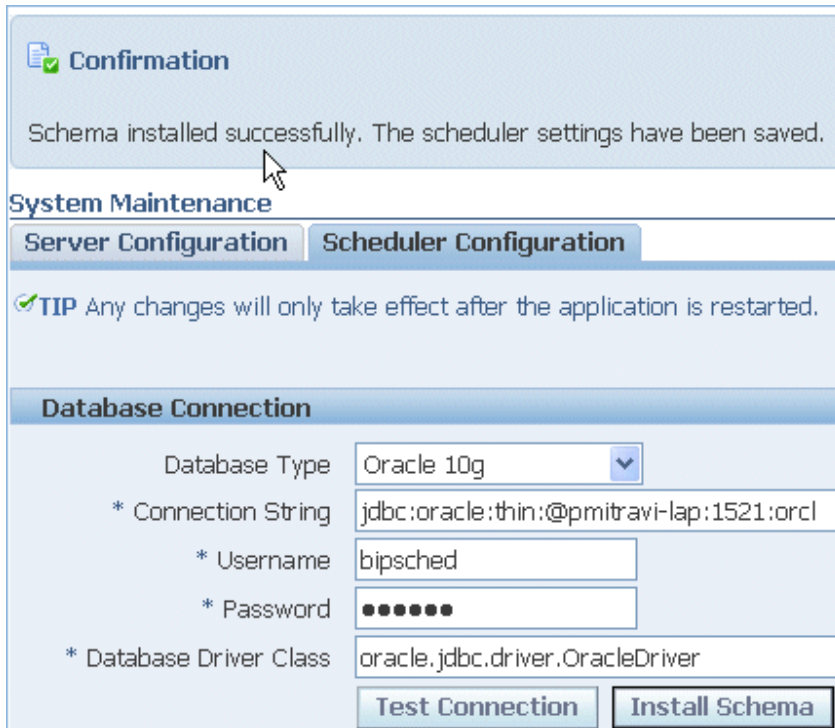
4. Click **Install Schema** to install the required scheduler schema tables.



This screenshot is similar to the first one but highlights the 'Install Schema' button. A mouse cursor is pointing at the button, and a tooltip with the text 'Install Schema' is visible below it. The rest of the page content remains the same.

Database Connection	
Database Type	Oracle 10g
* Connection String	jdbc:oracle:thin:@pmitravi-lap:1521:orcl
* Username	bipsched
* Password	••••••
* Database Driver Class	oracle.jdbc.driver.OracleDriver

After the tables are installed in the database, the following message is displayed:



Confirmation

Schema installed successfully. The scheduler settings have been saved.

System Maintenance

Server Configuration **Scheduler Configuration**

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

Database Connection

Database Type	Oracle 10g
* Connection String	jdbc:oracle:thin:@pmitravi-lap:1521:orcl
* Username	bipsched
* Password	*****
* Database Driver Class	oracle.jdbc.driver.OracleDriver

Test Connection **Install Schema**

Restart BI Publisher Server or the OC4J service after this configuration.

[Back to Topic](#)

Scheduling and Viewing Saved Output

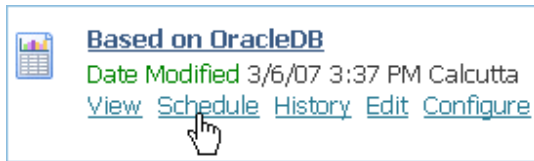
In this topic, you schedule the **Based on OracleDB** report that you have created previously and view the saved output in the report history:

1. Login to BI Publisher (if not already logged in), and click **Reports** tab to go to the Reports tabbed page.

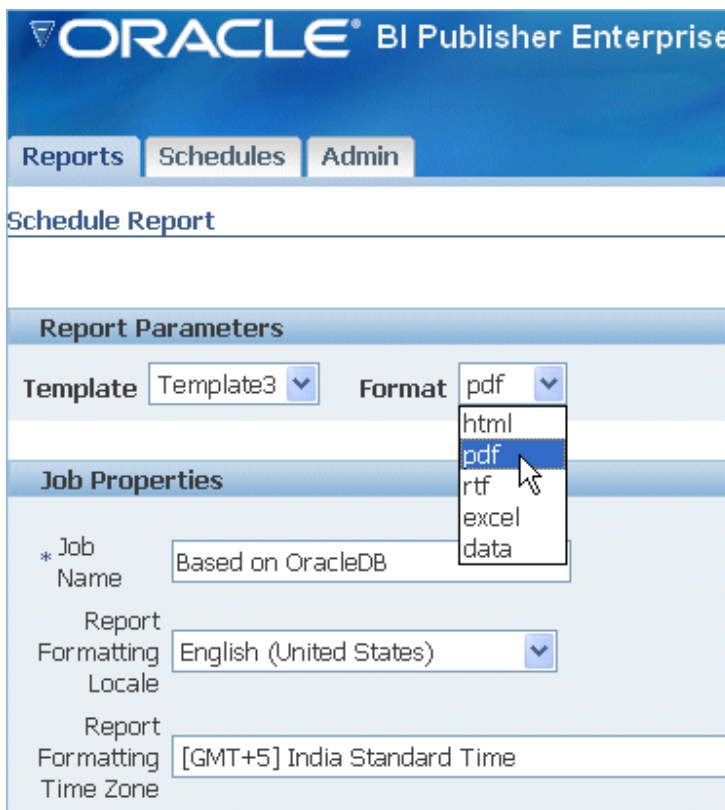


Navigate to the **My Folders > Learn** folder.

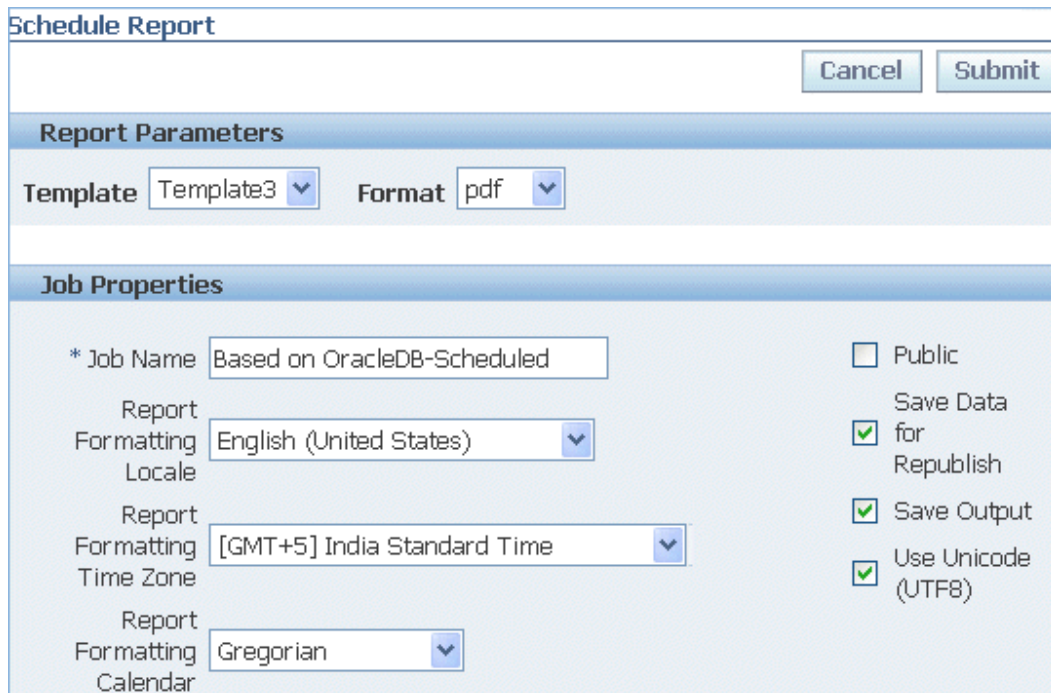
Click the **Schedule** link displayed below the report name for the **Based on OracleDB** report.



2. On the **Schedule Report** page that appears, select **Template3** from the **Template** drop-down list, and **PDF** as the **Format**.



Enter **Based on OracleDB-Scheduled** as the **Job Name**, and select appropriate language and time options as per your requirements. Also, ensure that the **Save Data for Republish** and **Save Output** options are selected. (Observe the screen below.)



Schedule Report

Cancel Submit

Report Parameters

Template Template3 Format pdf

Job Properties

* Job Name Based on OracleDB-Scheduled

Report Formatting Locale English (United States)

Report Formatting Time Zone [GMT+5] India Standard Time

Report Formatting Calendar Gregorian

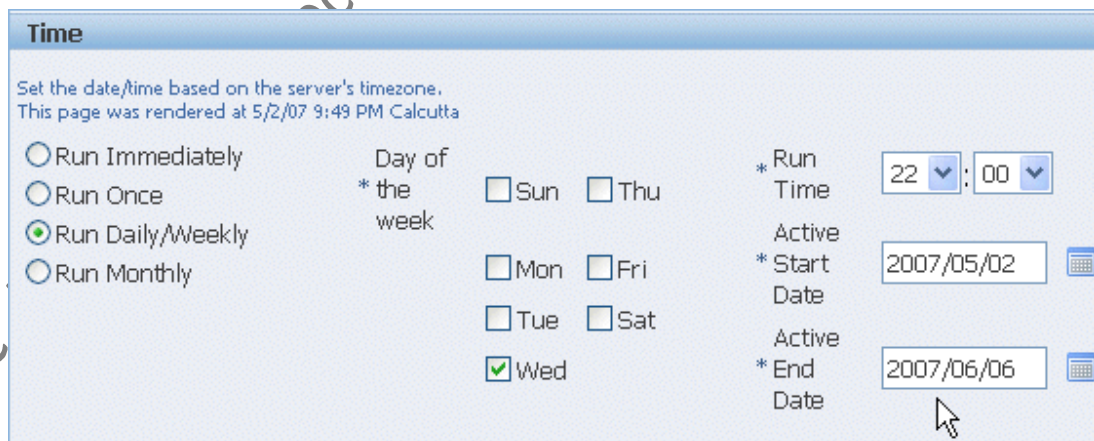
☐ Public

☒ Save Data for Republish

☒ Save Output

☒ Use Unicode (UTF8)

3. In the **Time** section of the **Schedule Report** page, select the **Run Daily/Weekly** option. Select the check box beside **Wed** to run the report on every Wednesday, select the **Run Time** as **22.00** (to run the report at 10 p.m. in the night), and choose an appropriate **Active Start Date** and **Active End Date**. Click **Submit**.



Time

Set the date/time based on the server's timezone.
This page was rendered at 5/2/07 9:49 PM Calcutta

☐ Run Immediately

☐ Run Once

☒ Run Daily/Weekly

☐ Run Monthly

Day of * the week

☐ Sun ☐ Thu

☐ Mon ☐ Fri

☐ Tue ☐ Sat

☒ Wed

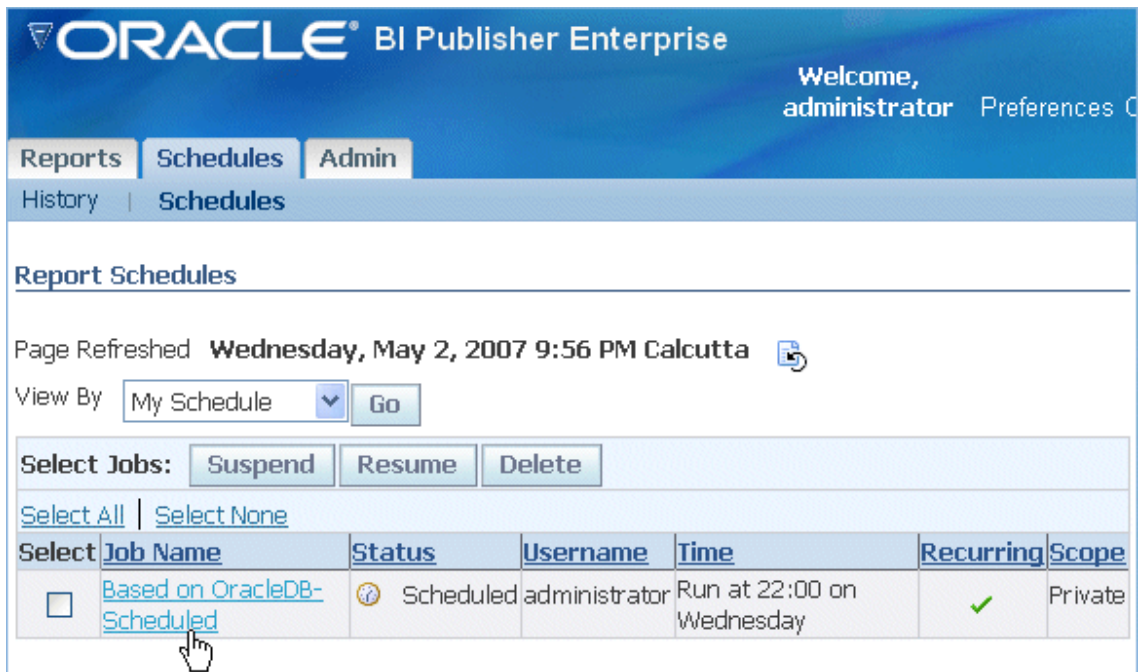
* Run Time 22 : 00

Active * Start Date 2007/05/02

Active * End Date 2007/06/06

This displays a message indicating the scheduling job is created successfully.

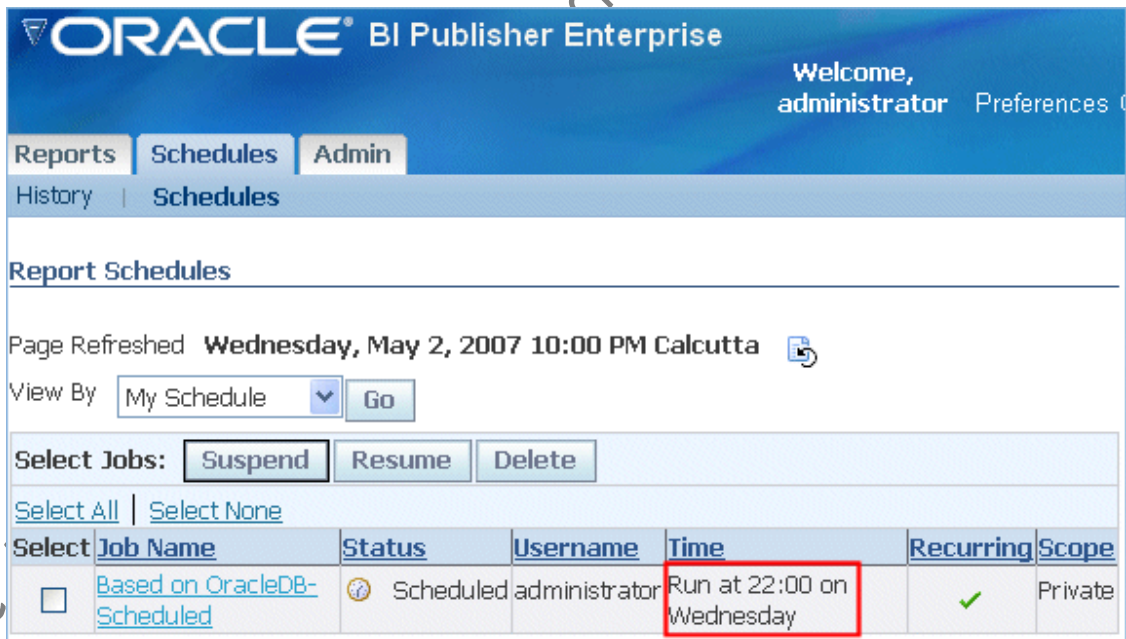
Also, note that the scheduled job is now displayed on the **Schedules** tabbed page:



The screenshot shows the Oracle BI Publisher Enterprise interface. The top navigation bar includes 'Reports', 'Schedules', and 'Admin'. The 'Schedules' tab is active, and the 'Schedules' sub-tab is selected. The page title is 'Report Schedules'. Below the title, it says 'Page Refreshed Wednesday, May 2, 2007 9:56 PM Calcutta'. There is a 'View By' dropdown set to 'My Schedule' and a 'Go' button. Below this, there are buttons for 'Select Jobs:', 'Suspend', 'Resume', and 'Delete'. There are also links for 'Select All' and 'Select None'. A table lists the scheduled jobs. The first job is 'Based on OracleDB-Scheduled', which is scheduled to run at 22:00 on Wednesday. The 'Recurring' column shows a green checkmark, and the 'Scope' is 'Private'. A mouse cursor is pointing at the job name.

Select	Job Name	Status	Username	Time	Recurring	Scope
<input type="checkbox"/>	Based on OracleDB-Scheduled	Scheduled	administrator	Run at 22:00 on Wednesday	✓	Private

You can also see that, the job is run at the scheduled time:



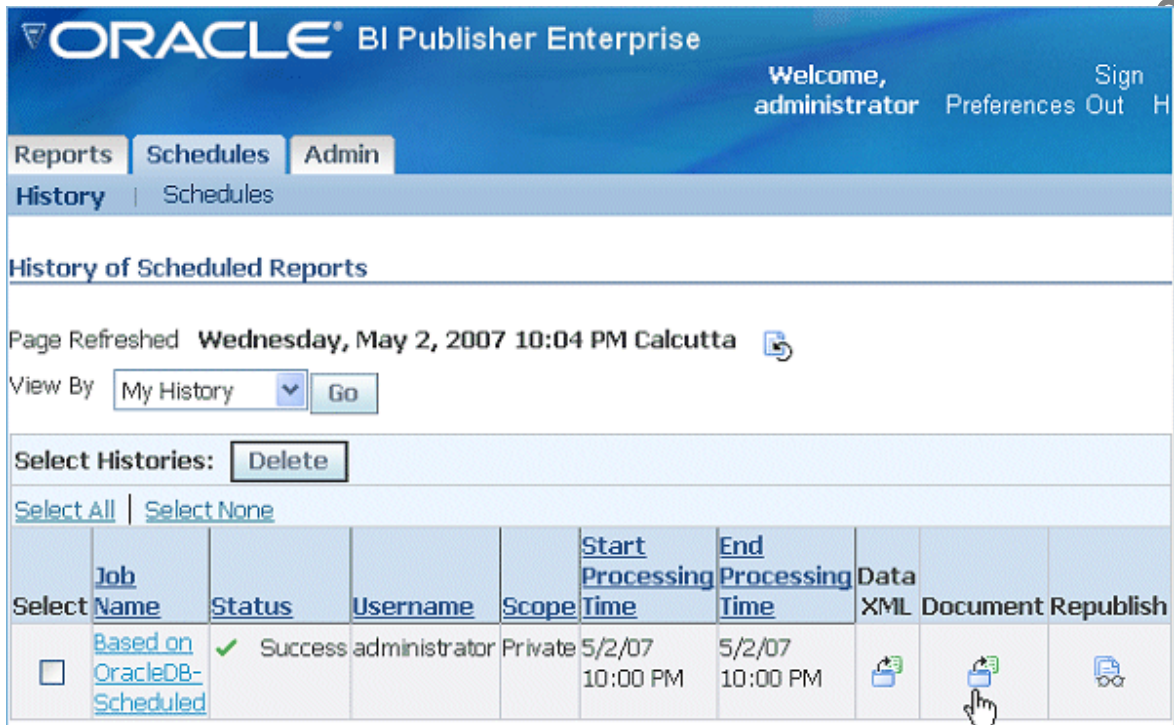
This screenshot is similar to the previous one, but the 'Time' column for the job 'Based on OracleDB-Scheduled' is highlighted with a red box. The time is 'Run at 22:00 on Wednesday'.

Select	Job Name	Status	Username	Time	Recurring	Scope
<input type="checkbox"/>	Based on OracleDB-Scheduled	Scheduled	administrator	Run at 22:00 on Wednesday	✓	Private

Note: You can deliver the scheduled report to destinations such as Email, FTP Server, and so on. Configuring delivery destinations is out of scope of this tutorial.

- Click the **History** tab to view the report history. Note that the **Data XML** and **Document** columns are shown in the history table.

Click the icon in the **Document** column to see the saved report.



ORACLE® BI Publisher Enterprise

Welcome, administrator Sign Out Preferences

Reports Schedules Admin

History Schedules

History of Scheduled Reports

Page Refreshed Wednesday, May 2, 2007 10:04 PM Calcutta

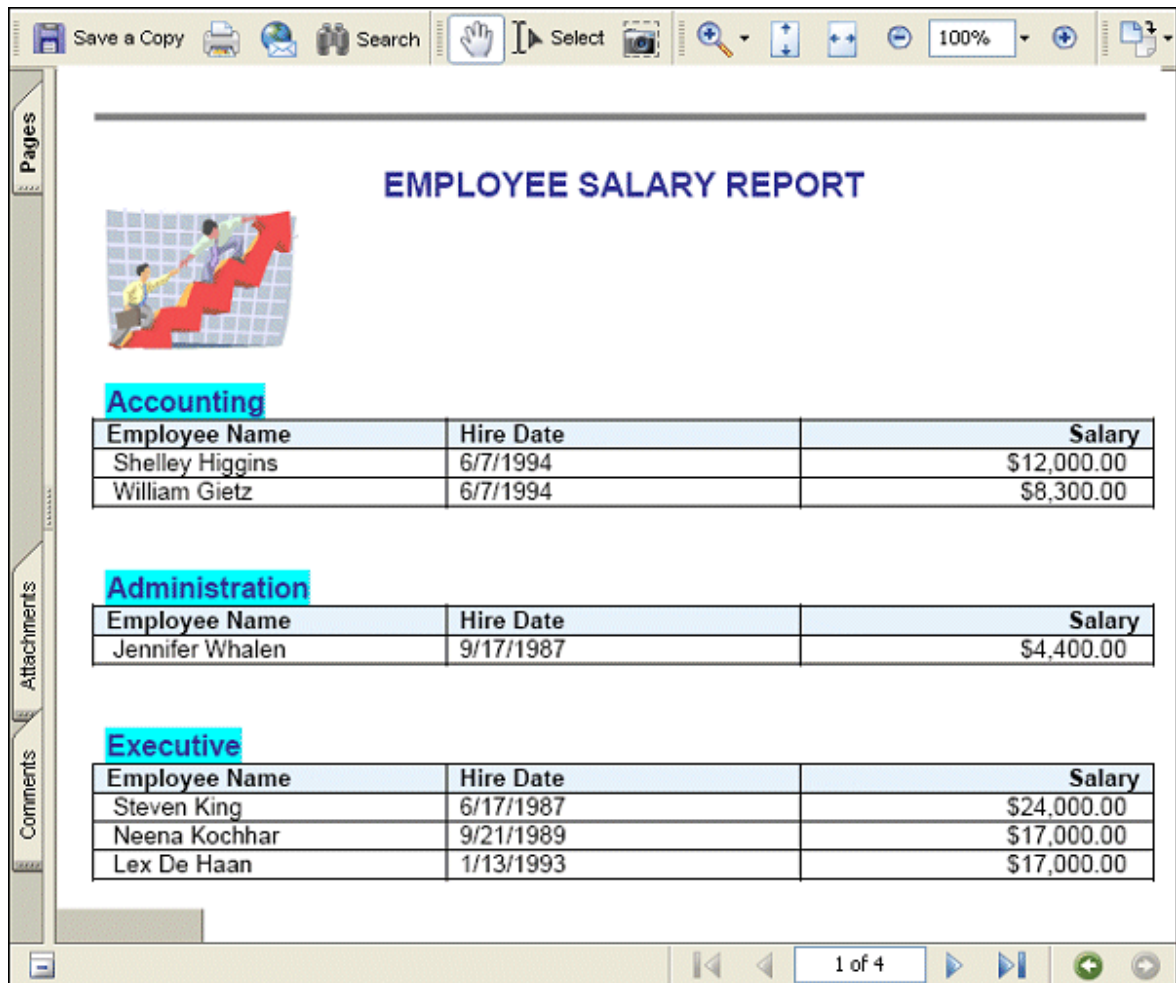
View By My History Go

Select Histories: Delete

[Select All](#) | [Select None](#)

Select	Job Name	Status	Username	Scope	Start Processing Time	End Processing Time	Data XML	Document	Republish
<input type="checkbox"/>	Based on OracleDB-Scheduled	✓ Success	administrator	Private	5/2/07 10:00 PM	5/2/07 10:00 PM			






This displays the report generated when the schedule was executed, using the template and format that you selected.



EMPLOYEE SALARY REPORT		
Accounting		
Employee Name	Hire Date	Salary
Shelley Higgins	6/7/1994	\$12,000.00
William Gietz	6/7/1994	\$8,300.00
Administration		
Employee Name	Hire Date	Salary
Jennifer Whalen	9/17/1987	\$4,400.00
Executive		
Employee Name	Hire Date	Salary
Steven King	6/17/1987	\$24,000.00
Neena Kochhar	9/21/1989	\$17,000.00
Lex De Haan	1/13/1993	\$17,000.00

Note: If you want to see the data of the scheduled report in XML form, you can click **Data XML**. If you want to republish, that is take the data from the scheduled job and generate a new document using the same template (or a different one) you can select **Republish** option.

5. You can view the job information by clicking the job name.

History of Scheduled Reports									
Page Refreshed Wednesday, May 2, 2007 10:22 PM Calcutta 									
View By My History  Go									
Select Histories: Delete									
Select All Select None									
Select	Job Name	Status	Username	Scope	Start Processing Time	End Processing Time	Data XML	Document	Republish
<input type="checkbox"/>	Based on OracleDB-Scheduled	✓ Success	administrator	Private	5/2/07 10:00 PM	5/2/07 10:00 PM			

 **ORACLE®** BI Publisher Enterprise

Welcome, administrator

Reports | Schedules | Admin

History | Schedules

Job Information

Job ID1
Job NameBased on OracleDB-Scheduled
Job Owneradministrator
Report Name[Based on OracleDB](#)
Report ScopePrivate
Job ScheduleRun at 22:00 on Wednesday
Active Start Date5/2/07 12:00 AM
Active End Date6/6/07 11:59 PM

Job Execution Information

History ID1
StatusSuccess
Start Processing Time5/2/07 10:00 PM
End Processing Time5/2/07 10:00 PM
Time Elapsed16.093 sec
XML Data[Download](#)
Generated Report[Download](#)

Document Processing

StatusSuccess

Back

You can also manage the jobs as well as the job histories in BI Publisher.
For example, to delete the job history for a specific job, select the job, and then click Delete.

History of Scheduled Reports

Page Refreshed **Wednesday, May 2, 2007 10:26 PM Calcutta**

View By

Select Histories:

[Select All](#) | [Select None](#)

Select	Job Name	Status	Username	Scope	Start Processing Time	End Processing Time	Data XML	Document	Republish
<input checked="" type="checkbox"/>	Based on OracleDB-Scheduled	✓ Success	administrator	Private	5/2/07 10:00 PM	5/2/07 10:00 PM			

Similarly, you can suspend, resume or delete a scheduled job from the **Schedules** tabbed page.

Reports | Schedules | Admin

History | Schedules

Report Schedules

Page Refreshed **Wednesday, May 2, 2007 10:31 PM Calcutta**

View By

Select Jobs:

[Select All](#) | [Select None](#)

Select	Job Name	Status	Username	Time	Recurring	Scope
<input checked="" type="checkbox"/>	Based on OracleDB-Scheduled	🕒 Scheduled	administrator	Run at 22:00 on Wednesday	✓	Private

[Back to Topic](#)

[Back to Topic List](#)

Creating BI Publisher Reports Based on Various Data Sources

Previously, you have created reports based on Oracle Database. BI Publisher also supports various types of data sources such as Web Services, HTTP/RSS, and Files. Because BI Publisher is integrated with Oracle Business Intelligence, you can also create reports based on the Oracle BI Answers request and Oracle BI

Server subject area.

The following topics guide you to create reports based on these various types of data sets:

- ☐ [Creating a Report Based on Oracle BI Answers Request](#)
- ☐ [Creating a Report Based on Oracle BI Server Subject Area](#)
- ☐ [Creating a Report Based on Web Services](#)
- ☐ [Creating a Report Based on HTTP/RSS Data set](#)
- ☐ [Creating a Report Based on File Data Set](#)

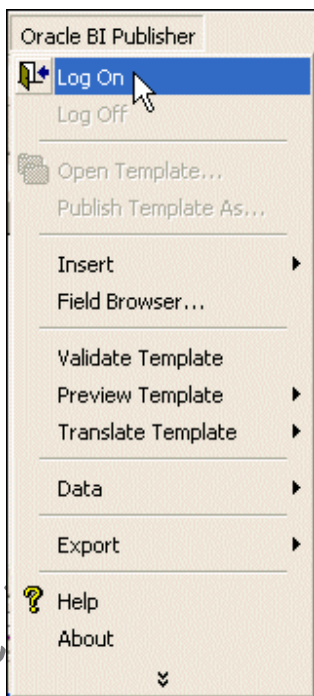
[Back to Topic List](#)

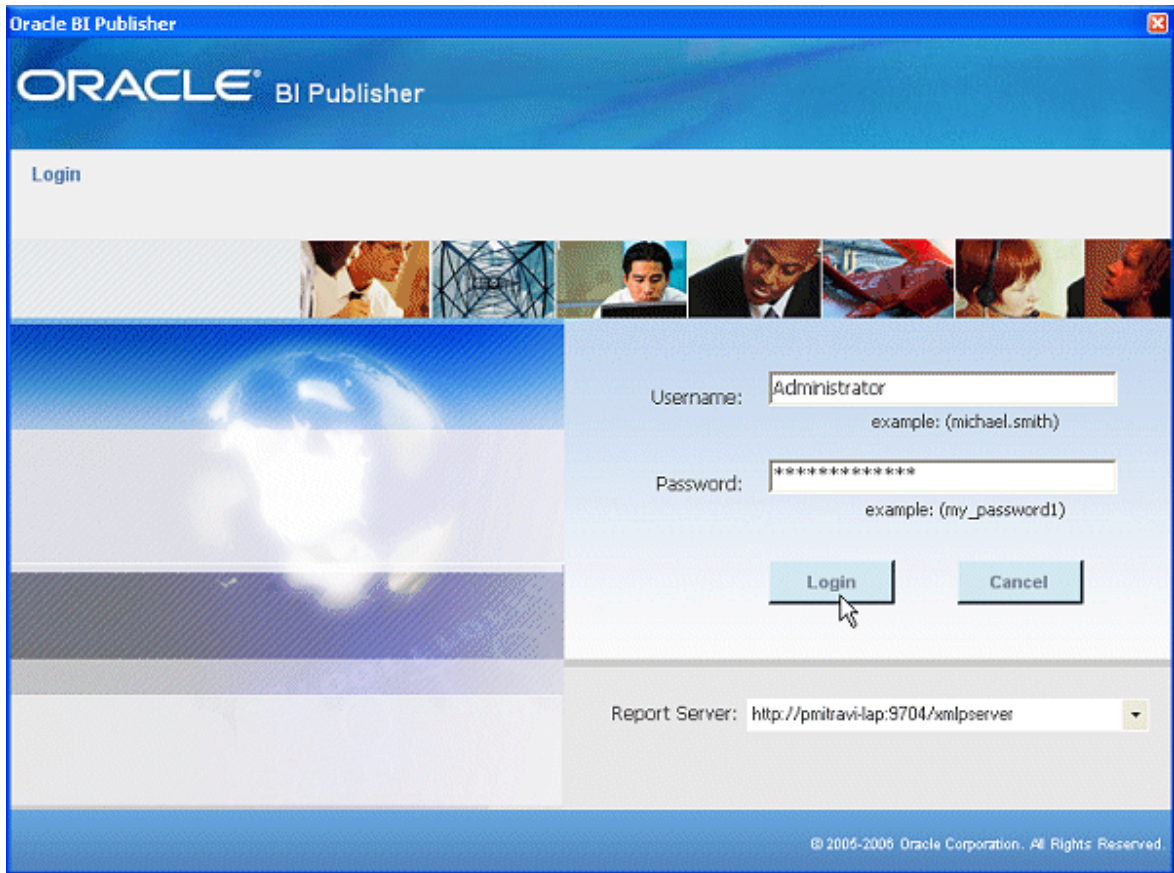
Creating a Report Based on Oracle BI Answers Request

The steps for creating a report based on BI Answers request are briefly discussed here. For more details, refer to the topic "[Creating a BI Publisher Report Based on Oracle BI Answers Request and Viewing Data](#)" in the OBE titled "Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2."

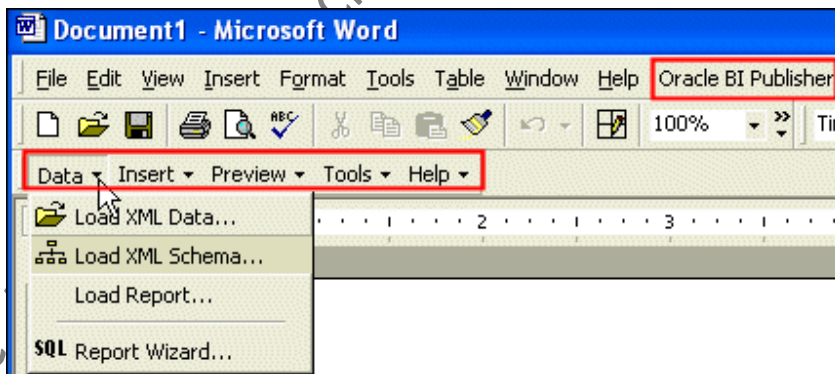
You can create a BI Publisher report from a new answers request or an existing one. A brief list of steps is provided here for your reference:

1. Start the MS Word application, and log in to Oracle BI Publisher as **Administrator**.



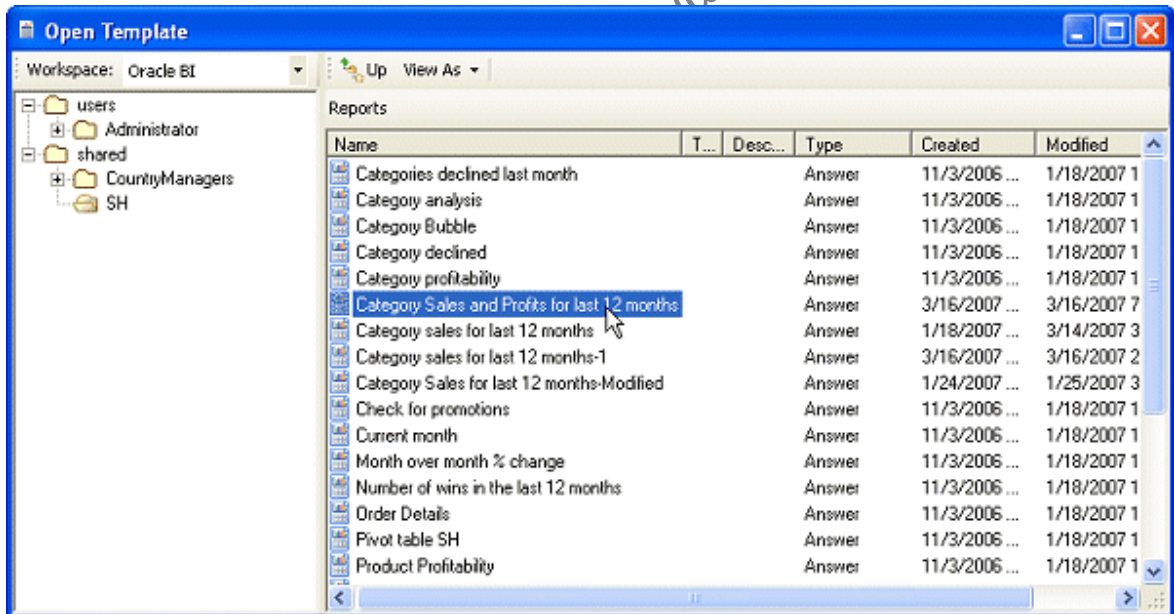
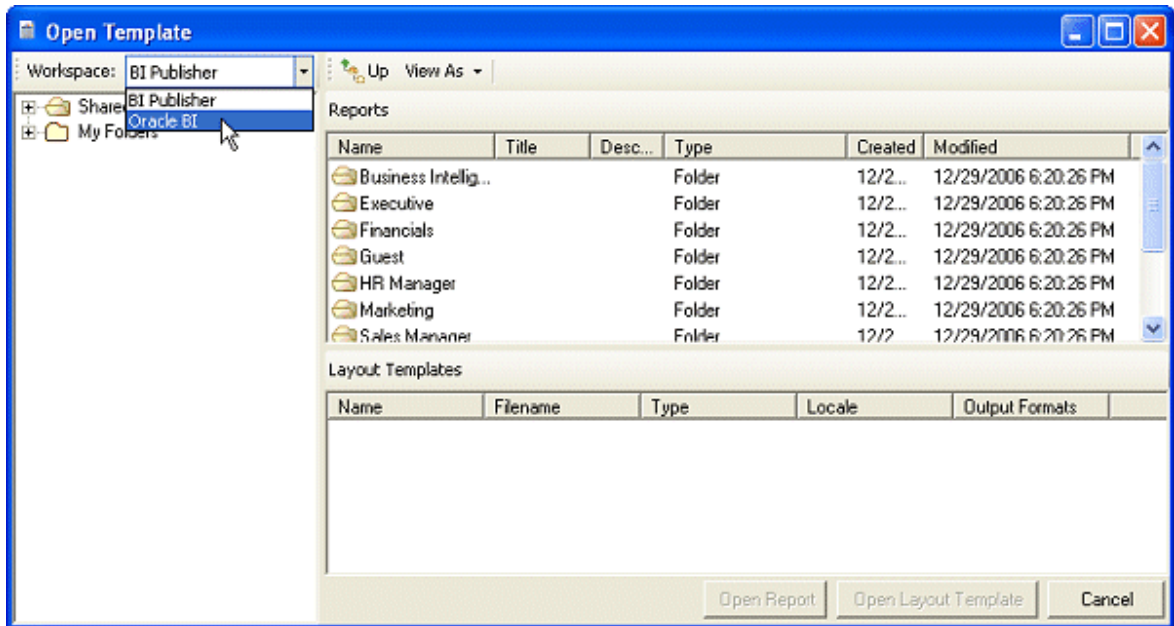


Note: The Oracle BI Publisher menu and the BI Publisher toolbar with the Data, Insert, Preview, Tools, and Help menu is displayed in MS Word only when you have successfully installed the Oracle BI Publisher Desktop as mentioned in step 6 of the **Prerequisites** section.

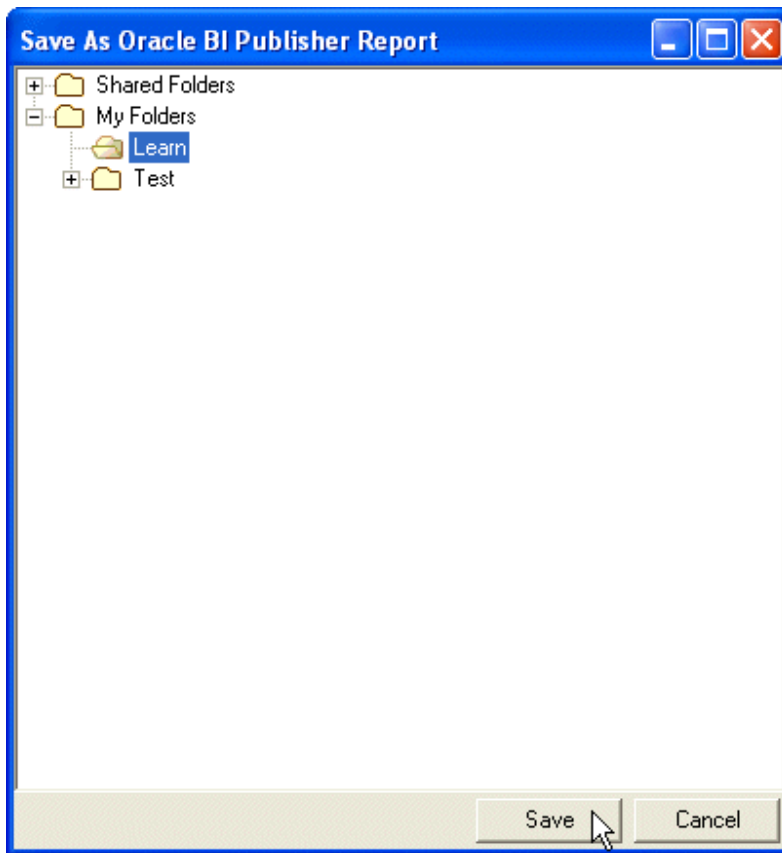


2. In MS Word, open the Answers request based on which you want to create the BI Publisher report: In the **Open Template** window, ensure that **Oracle BI** is selected from the **Workspace** drop-down list.

Navigate to the folder where you have saved the BI Answers request, and double-click the BI Answers request.



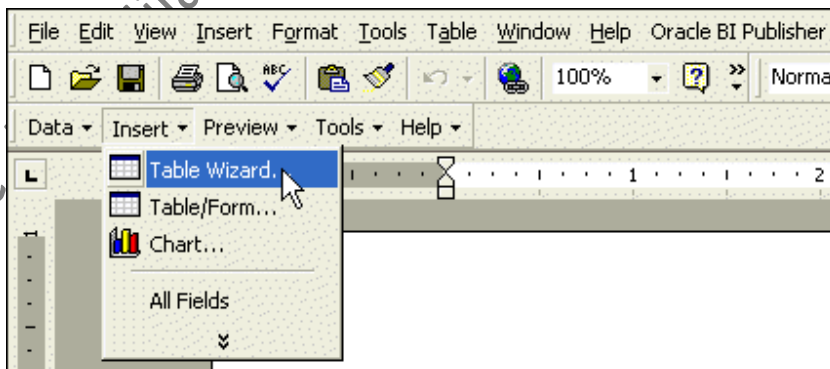
- This displays the **Save As Oracle BI Publisher Report** window. Navigate to the folder in which you want to save the report, and click **Save**.

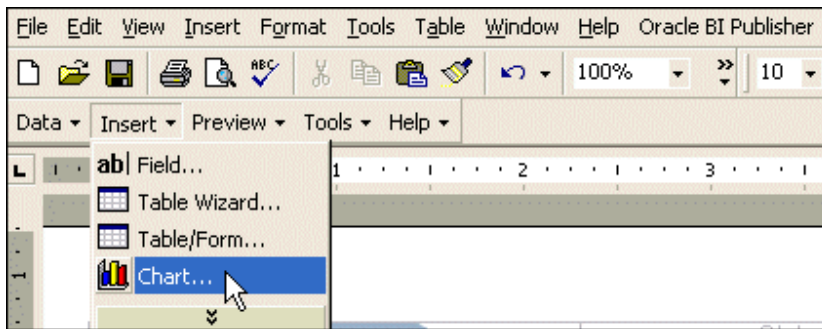


Here the report is saved in the **My Folders > Learn** folder in BI Publisher.

Note: You can also create a BI Publisher report based on the BI Answers request by logging in to BI Publisher (Web UI), and selecting the Data Set type for the report as Oracle BI Answers.

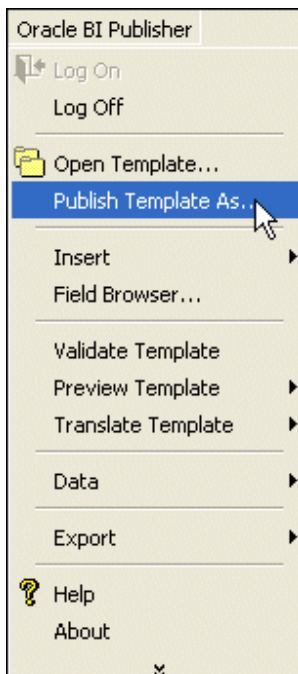
4. You can create an **RTF** template for the report by inserting the table and charts (Insert > Table Wizard, Insert > Chart menu options from the BI Publisher toolbar) as per your report design requirements, using the Table and Chart Wizards provided in MS Word for BI Publisher.



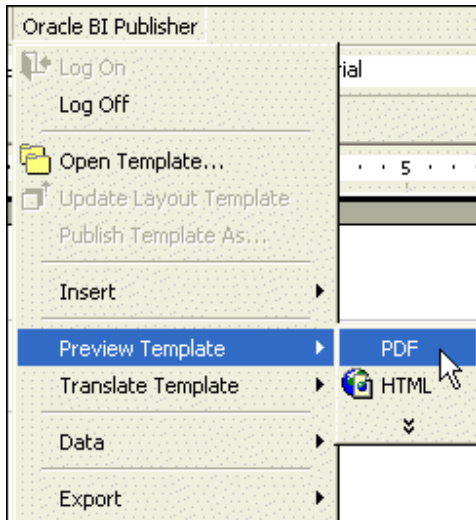


Note: Creating template files with charts and table is discussed in detail later in this tutorial.

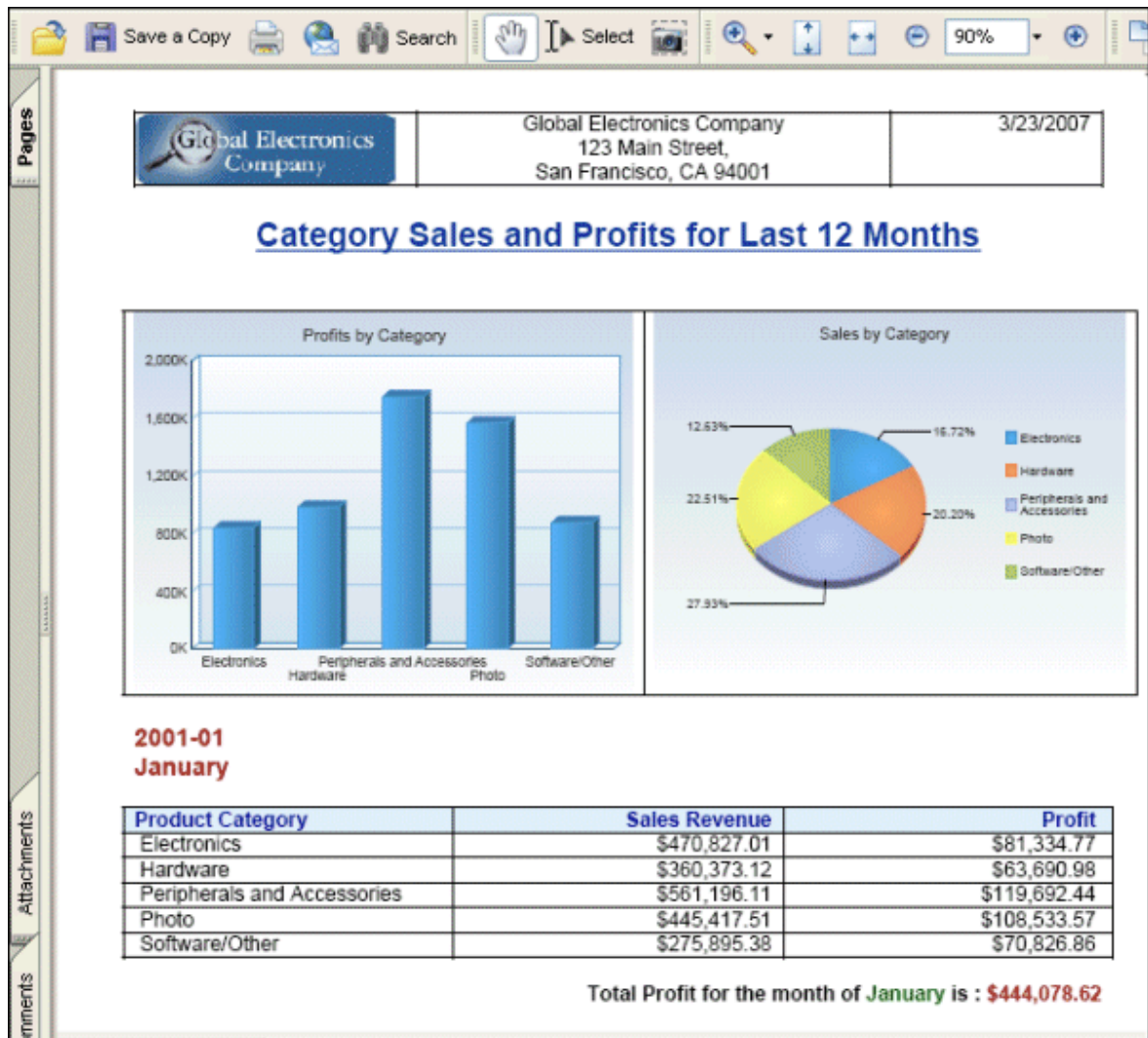
5. Publish the RTF file as template for the BI Publisher report.



You can also preview how the report looks like:



The sample report and the template from the OBE titled "Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2" is shown here:



You can also view the report in BI Publisher (Web) using the templates by logging in as Administrator.

[Back to Topic](#)

Creating a Report Based on Oracle BI Server Subject Area

The steps for creating a report based on BI Server subject area are briefly discussed here. For more details, refer to the topic "[Creating a BI Publisher Report Based on Oracle BI Server Subject Area and Viewing Data](#)" in the OBE titled "Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2."

A brief list of steps is provided here for your reference:

1. Log in (if not logged in) to **BI Publisher (Web)** as **Administrator** (password **Administrator**).
Note: You can log in to BI Publisher by entering the URL (in the following format) in the browser:

RR I-TEC, #209, Nilagiri Block, Adithya Enclave @8801408841 , 8790998182

http://<host>:9704/xmlpserver/



ORACLE® BI Publisher Enterprise

Username Administrator

Please contact administrator for your username/password.

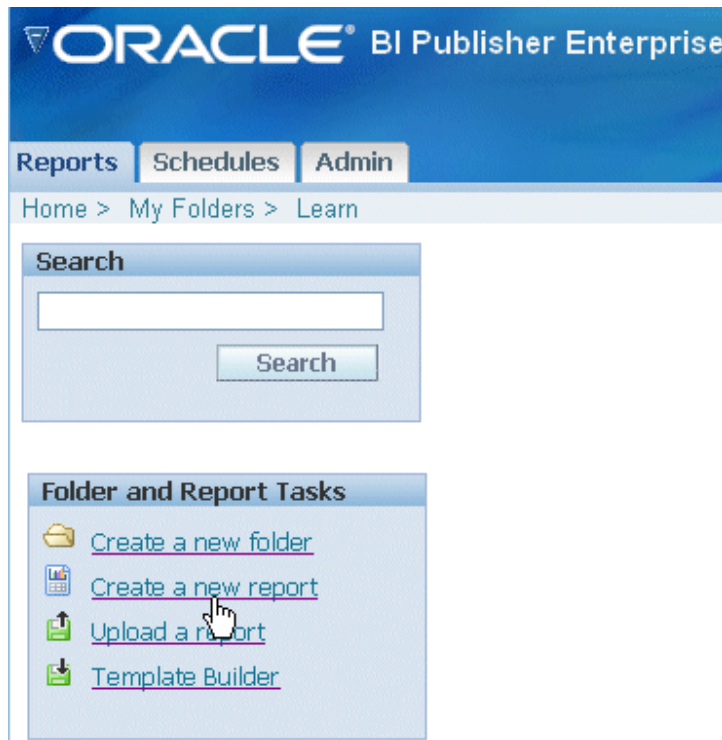
Password

Sign In

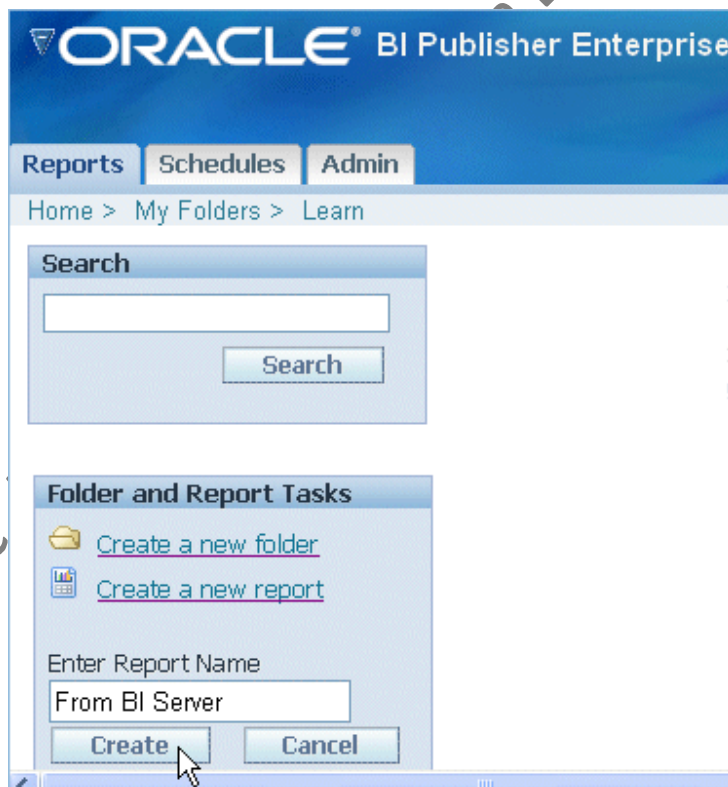
☐ Accessibility Mode

Or, if you have installed and set up Oracle Business Intelligence Enterprise Edition, you can also log in to BI Publisher from the **All Programs > Oracle Business Intelligence > BI Publisher** option from the Start menu.

2. Navigate to the folder where you want to create the report, and click **Create a new report**.

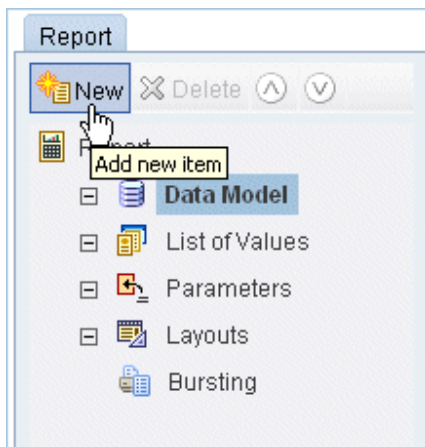


Enter an appropriate name for the report, and click **Create**.

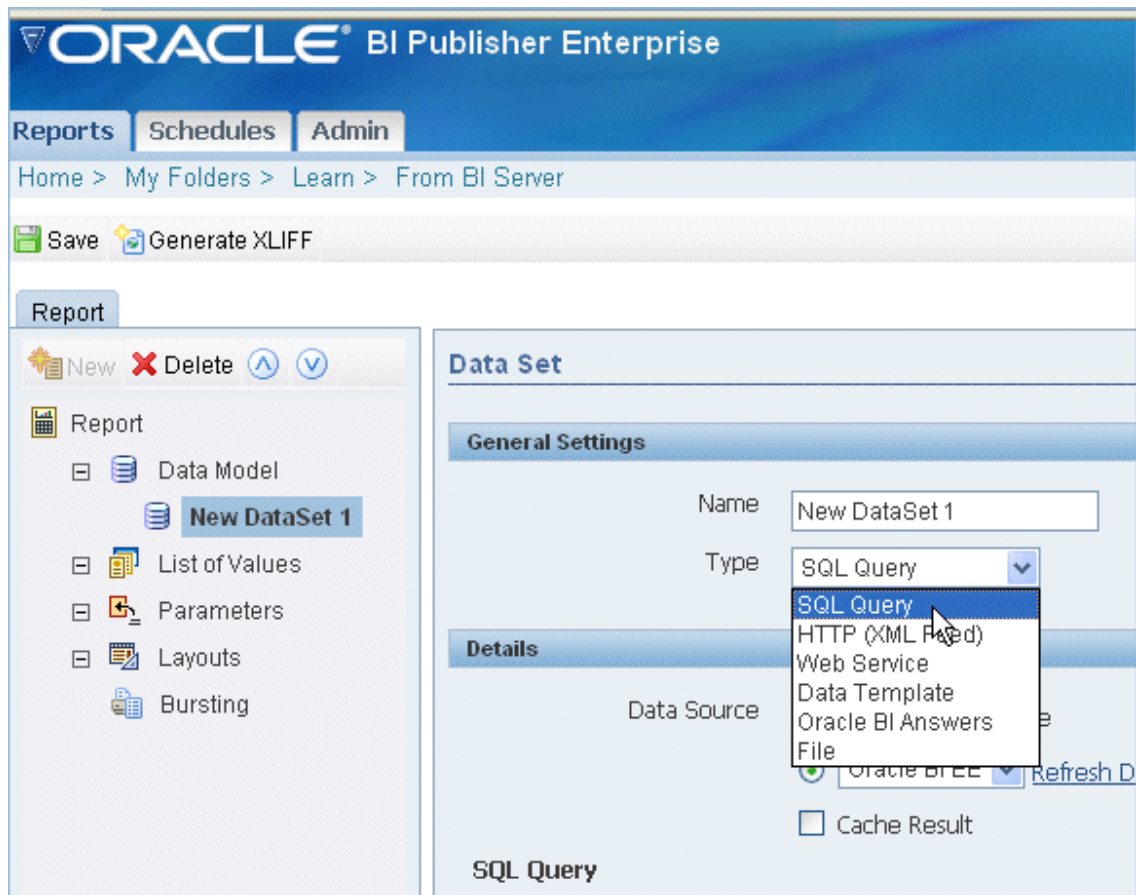


Here the report is created in the **My Folders>Learn** folder in BI Publisher.

3. Click **Edit** link displayed below the name of the report to to edit the report properties.
Click **Data Model** and click **New** to define the data source for this report.



4. On the **Data Set** page, ensure that **SQL Query** is selected from the **Type** drop-down list. Select **Cache Result** and ensure that **Oracle BI EE** is selected as the **Data Source**.



Data Set

General Settings

Name: New DataSet 1

Type: SQL Query

Details

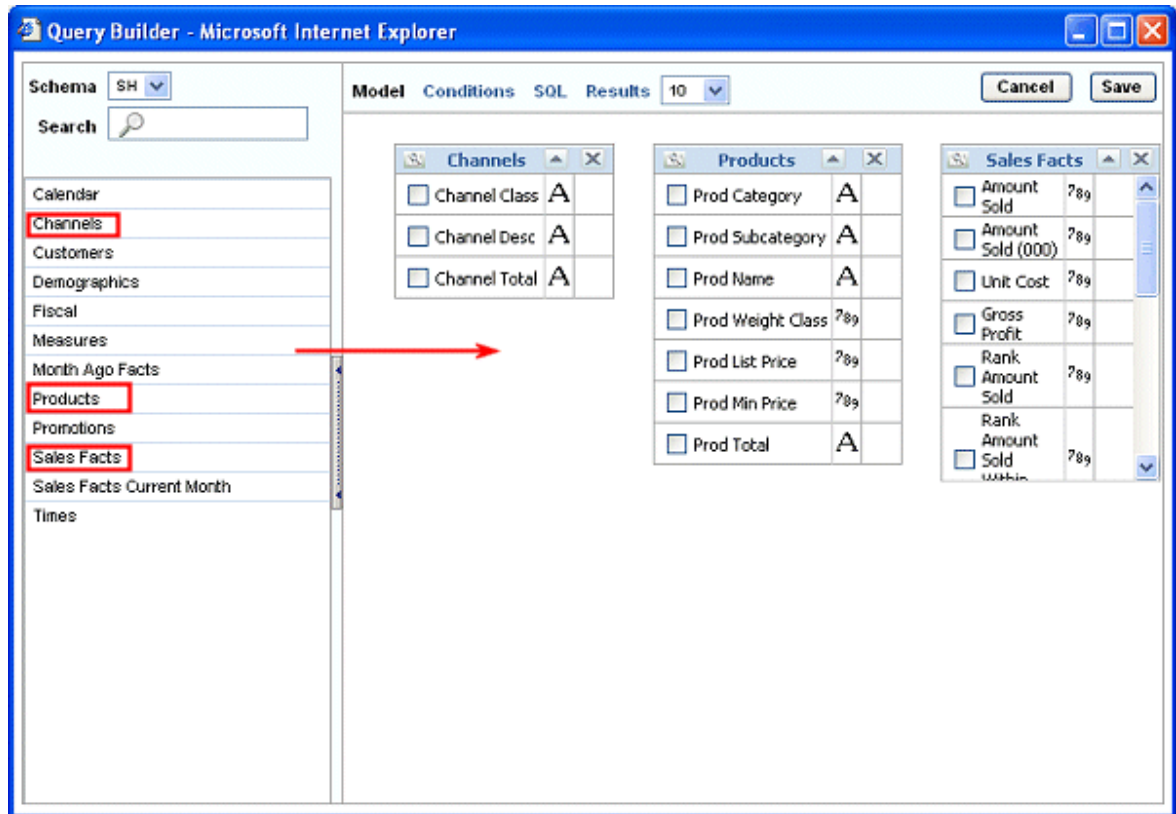
Data Source: ☐ Default Data Source ☒ Oracle BI EE [Refresh Data Source List](#)

☒ Cache Result

SQL Query

Query Builder

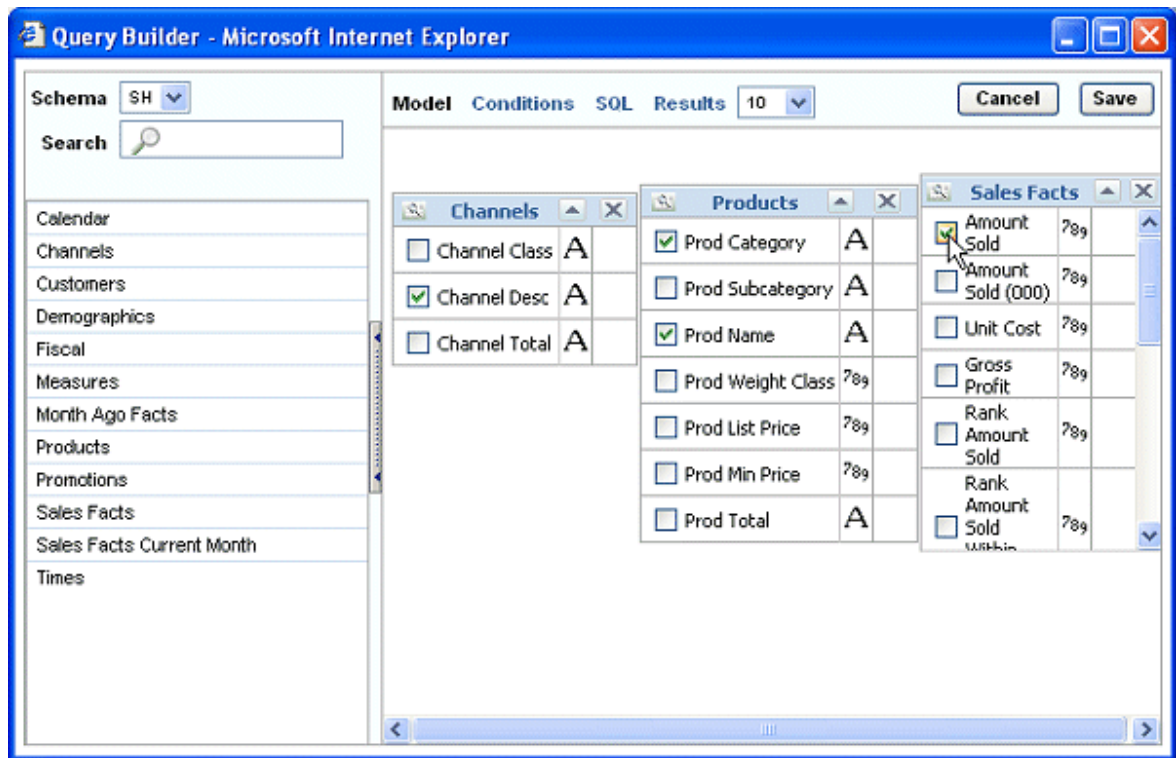
5. Click **Query Builder** to create a SQL Query.
The **Query Builder** is opened displaying the **SH** subject area (metadata repository) objects displayed on the left. Drag the **Channels**, **Products**, and **Sales Facts** SH schema objects one by one to the **Model** canvas on the right.




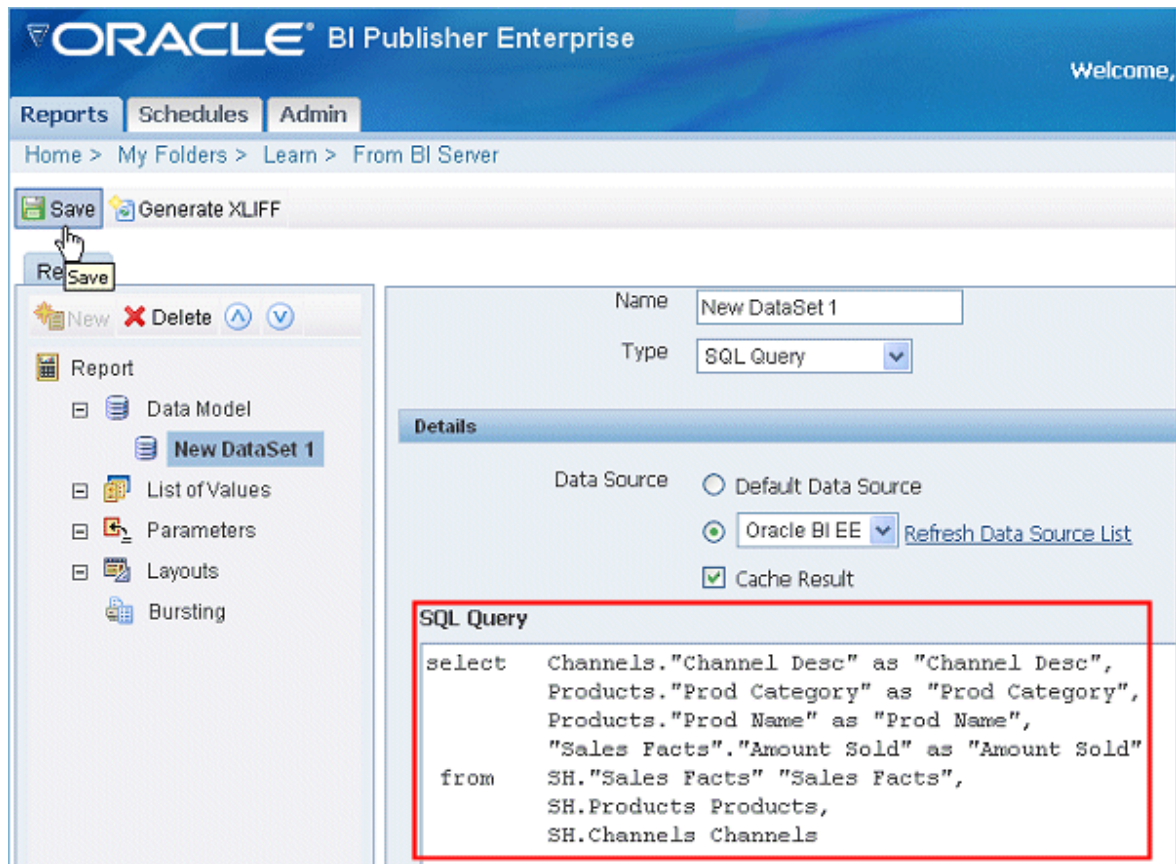
Select the following columns to be displayed in the query from the **Model** objects (by selecting the check boxes beside the column names):

- Select **Channel Desc** from **Channels**.
- Select **Prod Category** and **Prod Name** from **Products**.
- Select **Amount Sold** from **Sales Facts**.

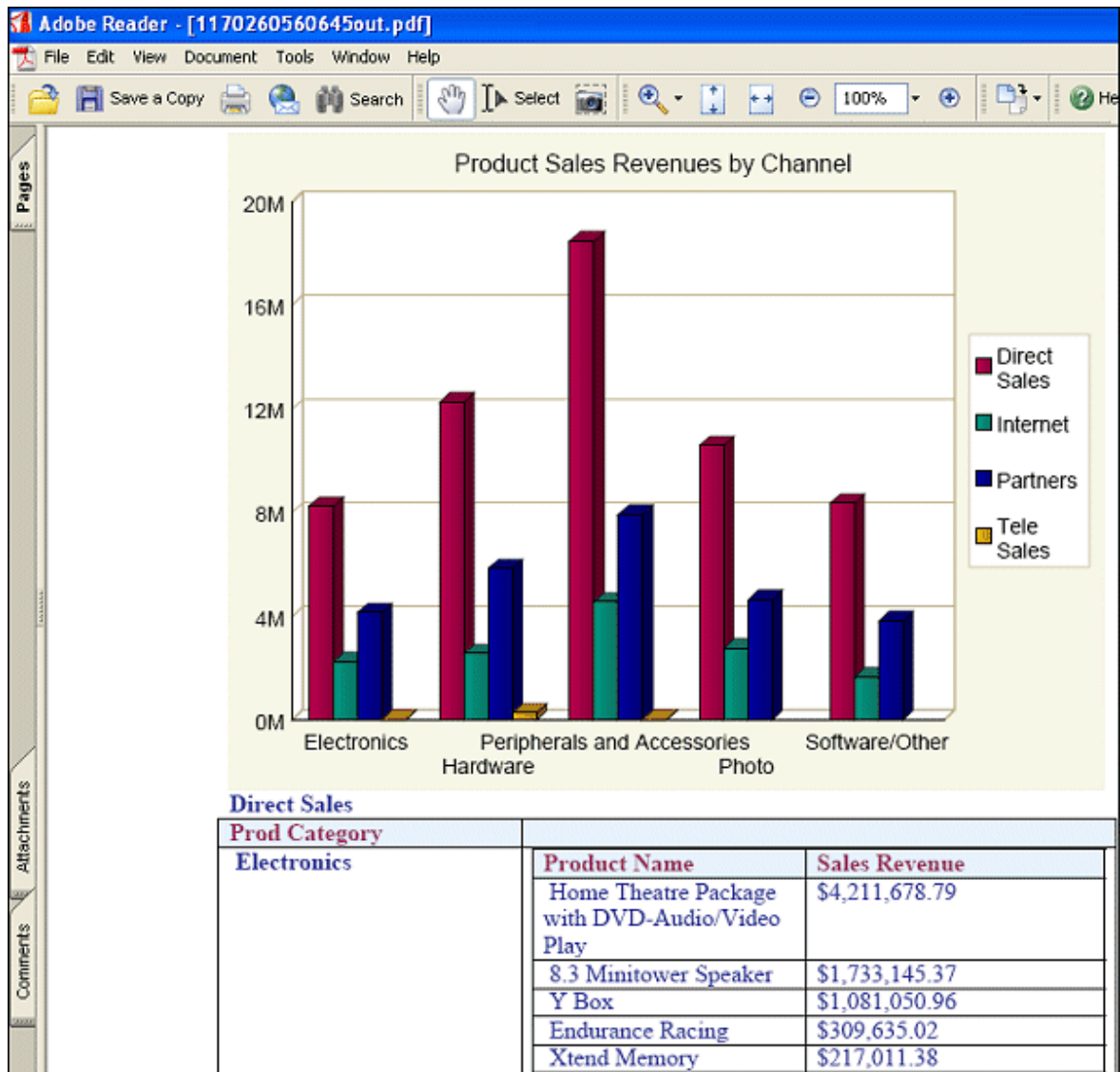
The screen looks like this after the column selection:



6. Click Save to save the query. Observe that the query is displayed in the **SQL Query** field of the Data Set page. Click the **Save**  icon to save the report.



7. You can create an RTF template for the report from MS Word by logging in to BI Publisher. The PDF output of the report using the template created in the OBE titled "**Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2**" is shown here:



[Back to Topic](#)

Creating a Report Based on Web Services

Web services are open standard-based (such as WSDL and SOAP) Web applications that interact with other Web applications for the purpose of exchanging data. Web services help quickly integrate applications across multiple platforms, systems and even across businesses in an easier, and cheaper way than ever before. Some of the Web services standards are SOAP, WSDL and UDDI, which enable system-to-system communication that is platform independent. Some of the popular Web services implementations are the ones to exchange information about stock quotes, currency converters, global weather, and so on.

Note: To avoid any firewall problems with the reports based on Web Services and RSS feeds, ensure that you have done the proxy settings as mentioned in step 6 of the **Prerequisites**.

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In this topic, you will create a BI Publisher report based on a Web service, which provides the stock quotes. You will also use a predefined RTF template (provided with this OBE) to view the data.

Perform the following steps:

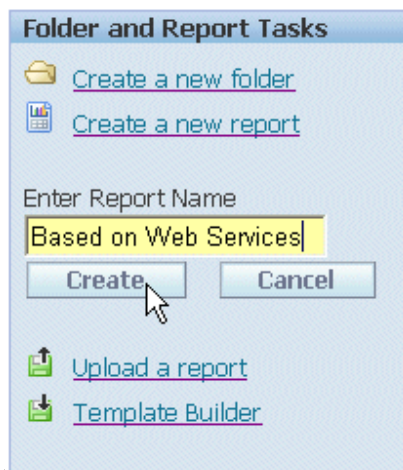
1. Log in (if not logged in) to **BI Publisher** (Web) as **Administrator** (password **Administrator**).
Note: You can log in to BI Publisher by entering the URL (in the following format) in the browser:
`http://<host>:9704/xmlpserver/`



2. Navigate to the folder where you have created the previous reports (**Learn** folder), and click **Create a new report**.

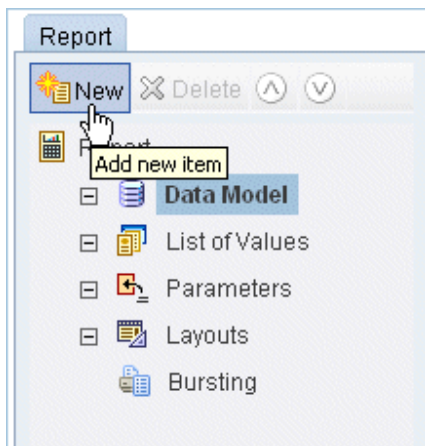


Enter **Based on Web Services** as the name for the report, and click **Create**.

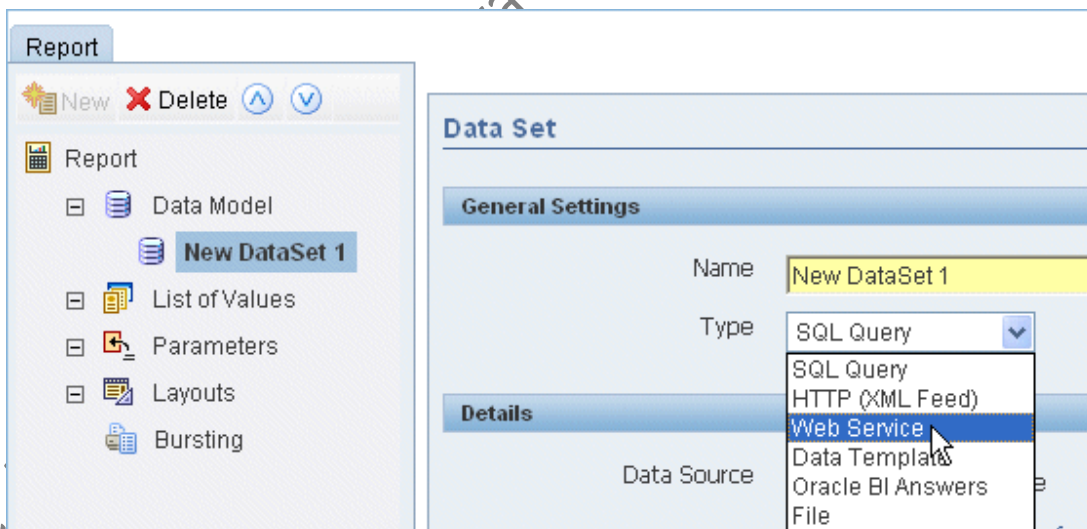


The report is created in the **My Folders>Learn** folder in BI Publisher.

3. Click the **Edit** link below the name of the report.
Select the **Data Model** node on the left, and click **New** to define a new data model for the report.



4. Click the **New Data Set1** created, this opens the **Data Set** page on the right.
Select **Web Service** from the **Type** drop-down list.



5. Enter <http://www.websvcex.net/stockquote.aspx?WSDL> in the **WSDL URL** field,
and **GetQuote** as the method name.
Click the **Save** icon to save the report.

Data Set

General Settings

Name: New DataSet 1

Type: Web Service

Details

WSDL URL: http://www.webserviceX.net/stockquote.asmx?WSDL

Method: GetQuote

Parameters: [Add](#)

Note: WebserviceX.NET provides on-demand XML Web Services for Financial, Distribution, Retail, Health Care, Manufacturing, Telecom, Government, and Educational organizations or industries.

6. Click **Parameters** and click **New** to add a parameter for the stock symbol.

Report

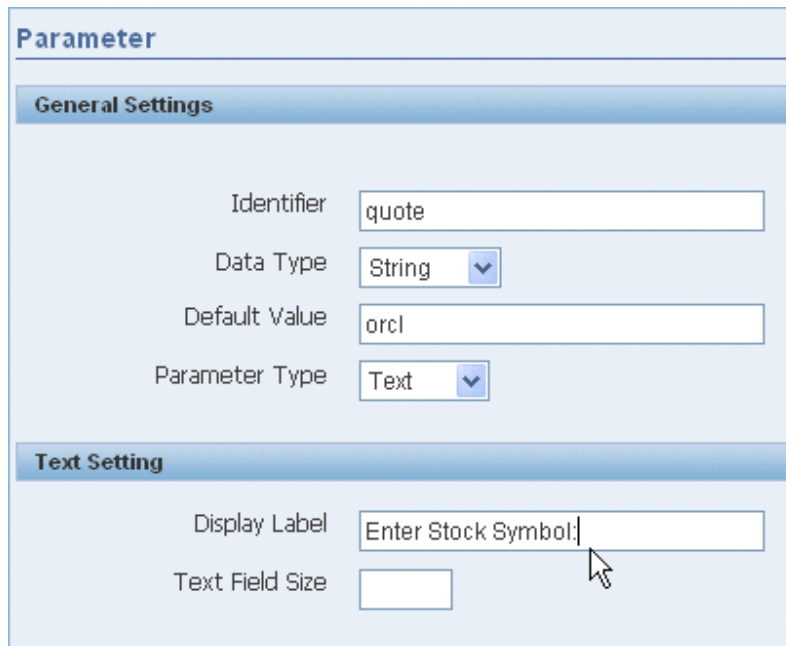
New Delete Up Down

Add new item

- Data Model
- New DataSet 1
- List of Values
- Parameters**
- Layouts
- Bursting

7. On the **Parameter** page that appears:

- Enter **Quote** as the **Identifier**
- Select **String** from the **Data Type** drop-down list
- Enter **orcl** as the **Default Value**, and **Text** as the **Parameter Type**
- Type **Enter Stock Symbol:** in the **Display Label** field.



Parameter

General Settings

Identifier:

Data Type:

Default Value:

Parameter Type:

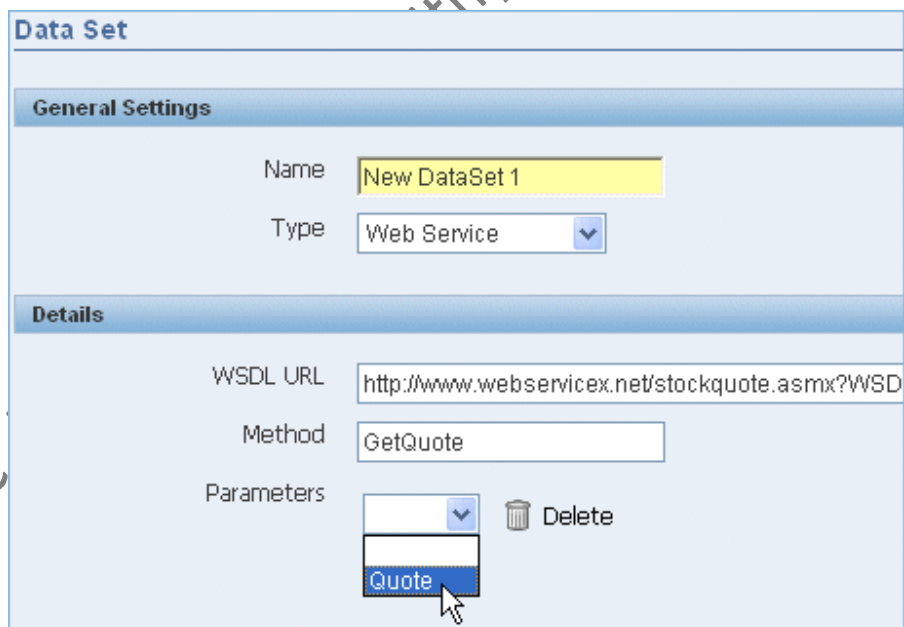
Text Setting

Display Label:

Text Field Size:

Click the **Save**  icon to save the report.

- Click **New Data Set1** under the **Data Model** node.
The **Data Set** page appears on the right.
Ensure that **Quote** is selected in the **Parameters** drop-down list.



Data Set

General Settings

Name:


Type:

Details

WSDL URL:

Method:

Parameters:

 Delete

9. The **Data Set** page looks like the screen below:

Data Set	
General Settings	
Name	New DataSet 1
Type	Web Service
Details	
WSDL URL	http://www.webservice.net/stockquote.asmx?WSDL
Method	GetQuote
Parameters	Quote Delete
Add	

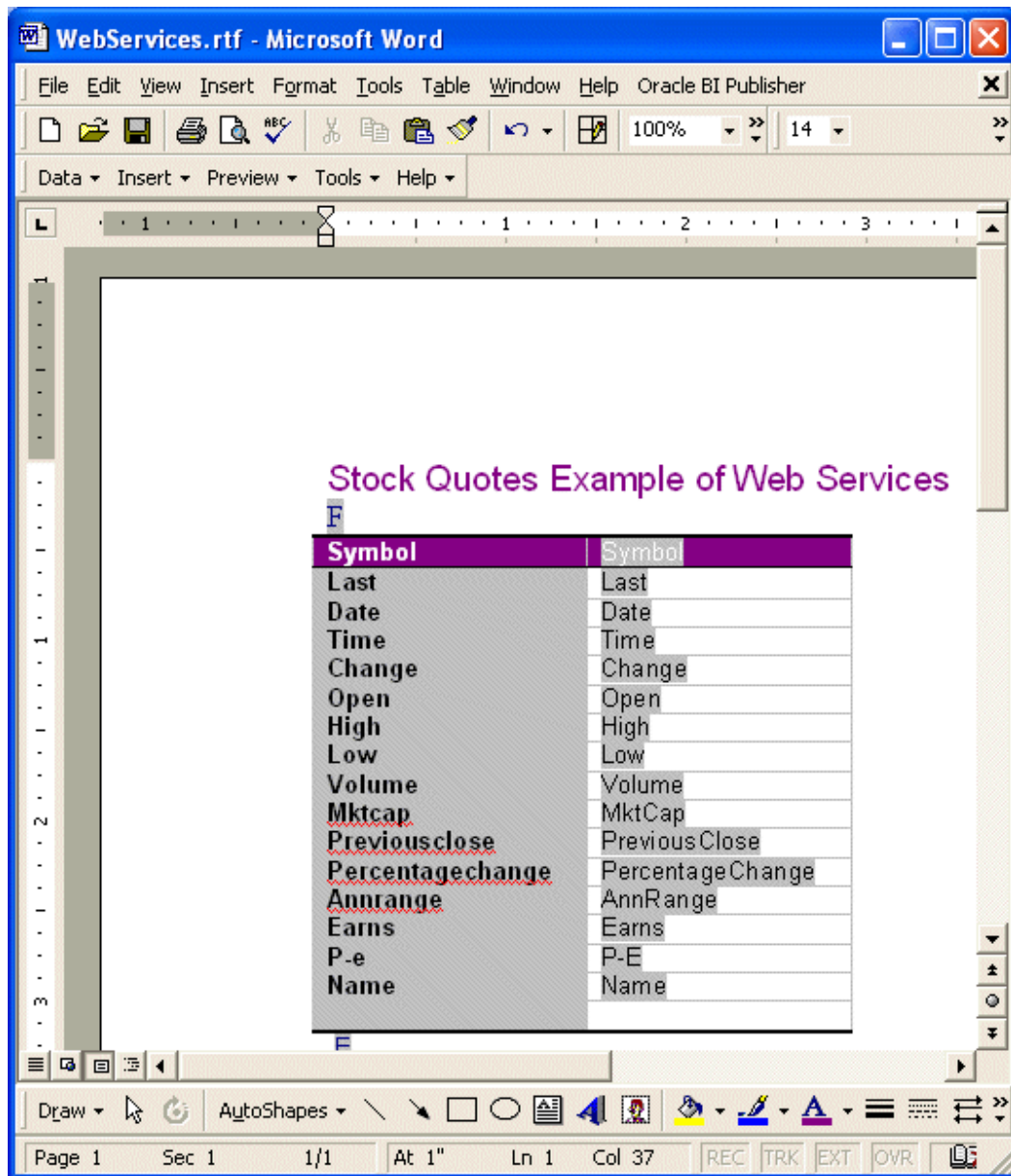
Click **Save** to save the changes to the report.

View the XML data to see if the stock quotes for Oracle Corporation are being returned to the report.

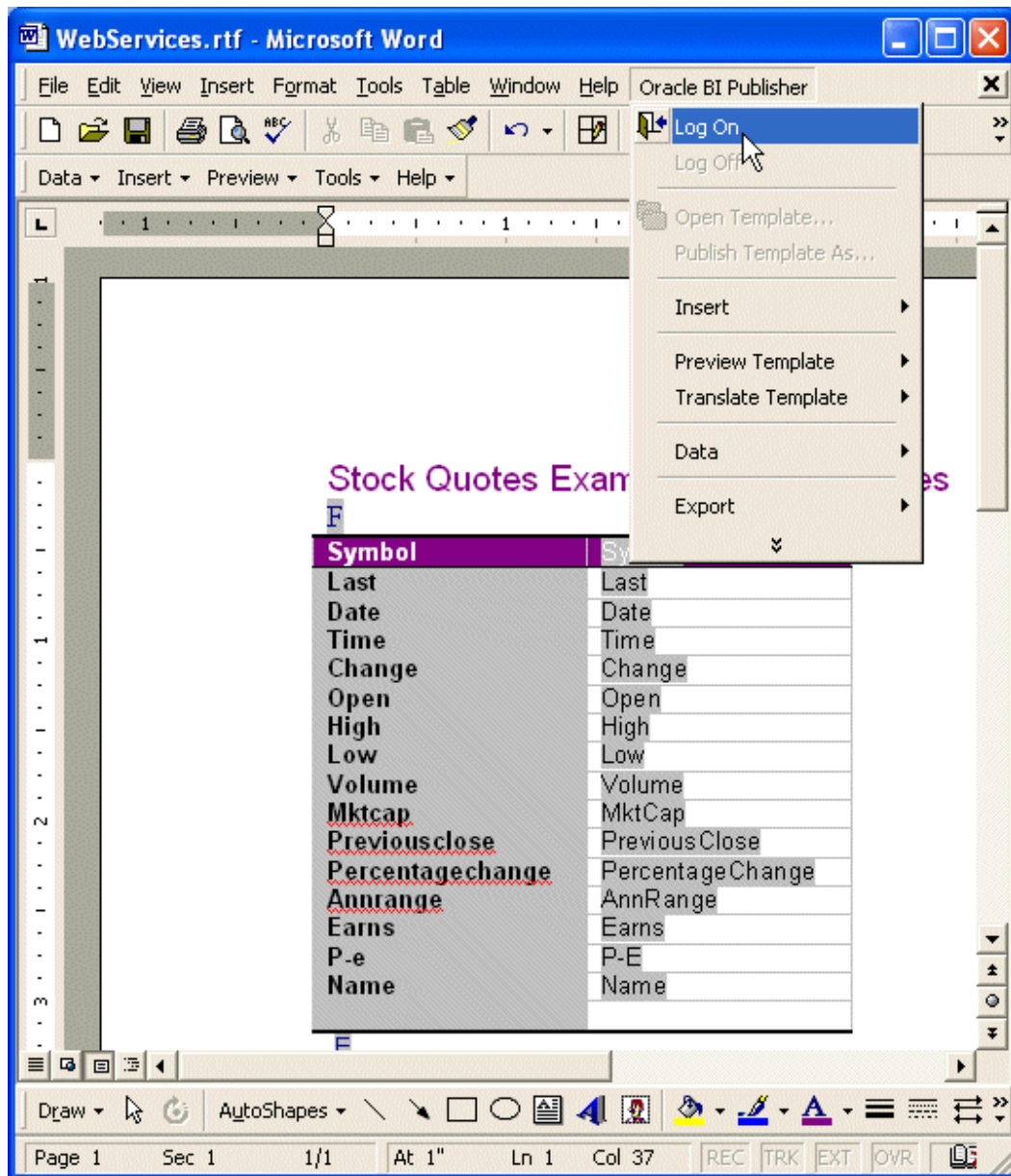


You can also view the stock quotes for other corporations by entering appropriate stock symbols such as **msft** (Microsoft), **GE** (General Electric), and so on.

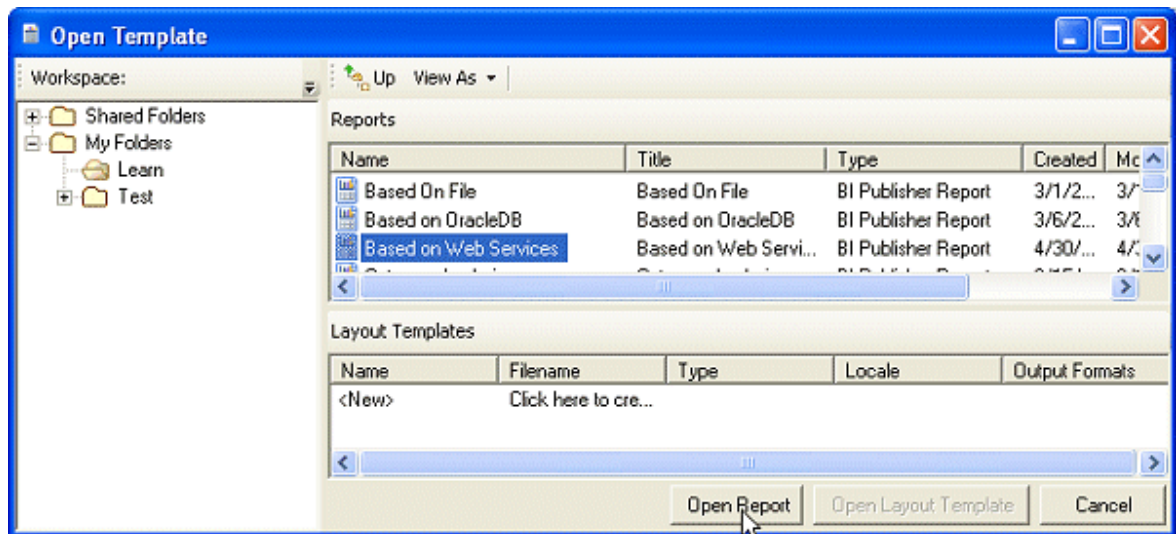
10. Open the [WebServices.rtf](#) (provided with this OBE) template file and save it on your local system with the same name.
Now open this file in MS Word.
The file looks like this:



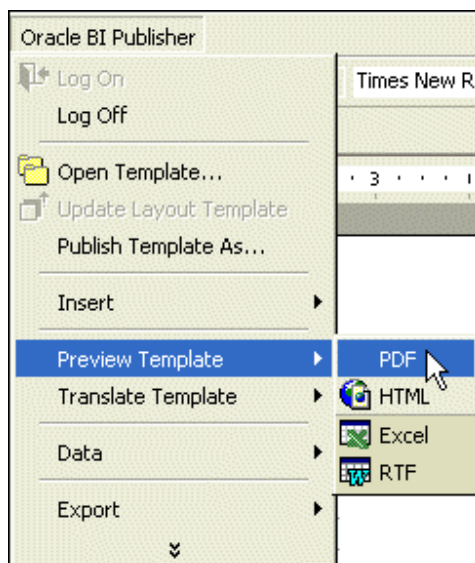
11. Connect to Oracle BI Publisher as **Administrator** in MS Word.

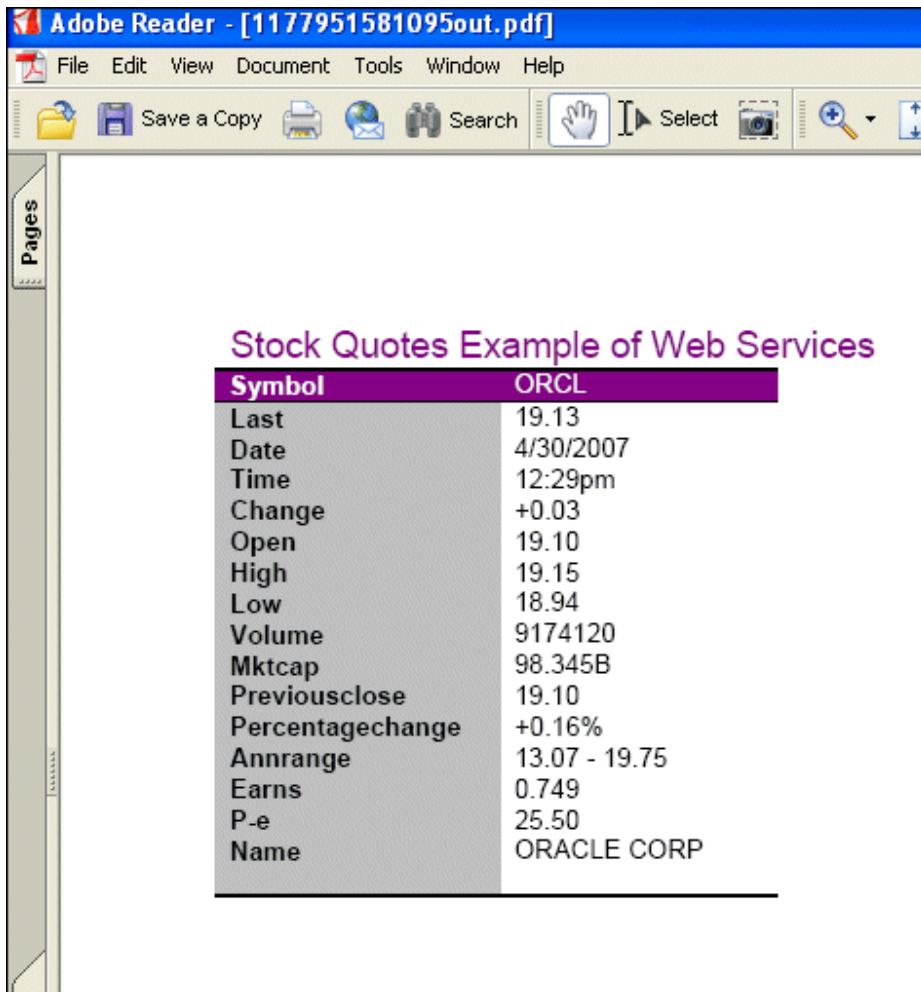


12. This opens the **Open Template** window.
Navigate to **My Folders> Learn**.
Select **Based on Web Services** report and click **Open Report**.



13. Select the **BI Publisher > Preview Template > PDF** option from the menu to preview the data in the report using this template.





Adobe Reader - [1177951581095out.pdf]

File Edit View Document Tools Window Help

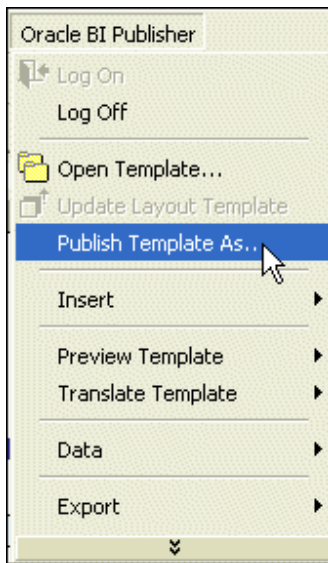
Save a Copy Search Select

Pages

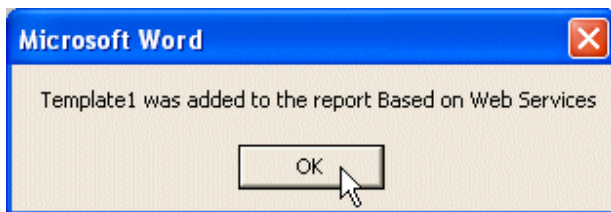
Stock Quotes Example of Web Services

Symbol	ORCL
Last	19.13
Date	4/30/2007
Time	12:29pm
Change	+0.03
Open	19.10
High	19.15
Low	18.94
Volume	9174120
Mktcap	98.345B
Previousclose	19.10
Percentagechange	+0.16%
Annrange	13.07 - 19.75
Earns	0.749
P-e	25.50
Name	ORACLE CORP

14. Select the **BI publishers > Publish Template As** option to publish the template for this report. Enter **Template1** (or any other appropriate name) as the template name, and click **OK**.



Click **OK** again when the following message is displayed.



[Back to Topic](#)

Creating a Report Based on HTTP/RSS Data Set

You can create a BI Publisher report based on RSS feeds available on the Web. You can do this by selecting HTTP as the Data Set type in BI Publisher when creating the report.

About RSS Feeds: As defined by [Wikipedia](#), RSS (acronymic for Really Simple Syndication) is "a group of XML based web content distribution and republication (Web syndication) formats primarily used by news sites and web logs (popularly known as blogs)." Essentially, an RSS feed is a hosted XML file from which your RSS newsreader pulls headlines, URLs, and other content as it is updated. Users of RSS content use software programs called "feed readers" or "feed aggregators." The user subscribes to a feed by entering a link to the feed into the reader program. The reader can then check the user's subscribed feeds to see if any of those feeds have new content since the last time it was checked, and if so, retrieve that content and present it to the user.

In this topic, a simple site with RSS feed links (The New York Times) is used to show how the data is rendered to a BI Publisher report. (However, note that the RSS readers or aggregators are not discussed here, as they are out of the scope for this tutorial.)

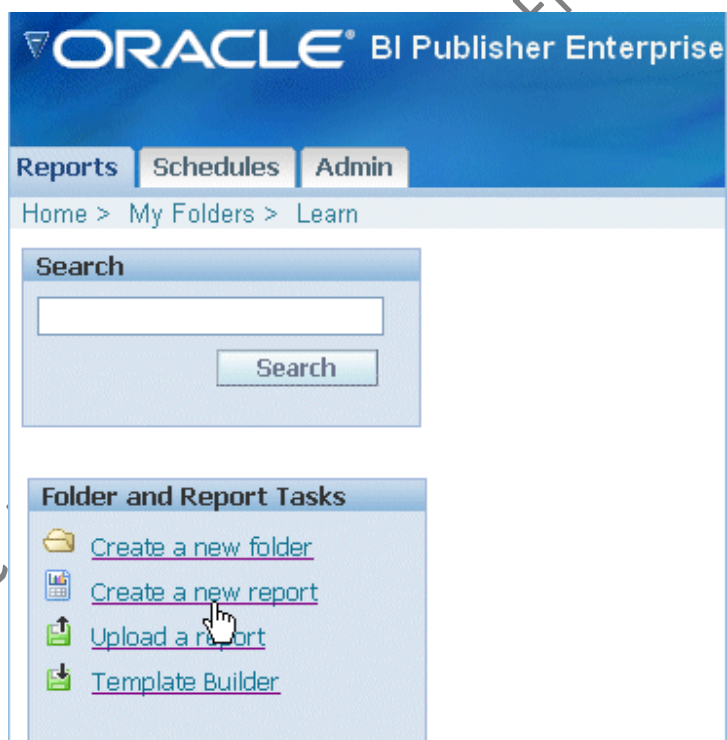
1. Log in (if not logged in) to **BI Publisher** (Web) as **Administrator** (password **Administrator**).
Note: You can log in to BI Publisher by entering the URL (in the following format) in browser:

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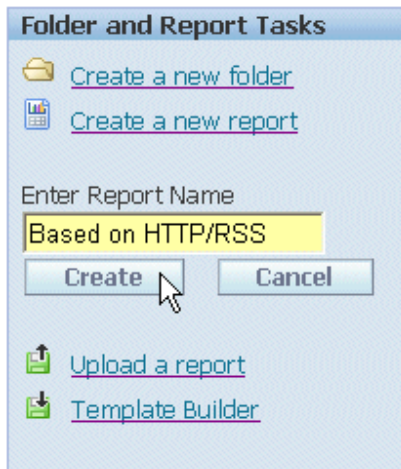
http://<host>:9704/xmlpserver/



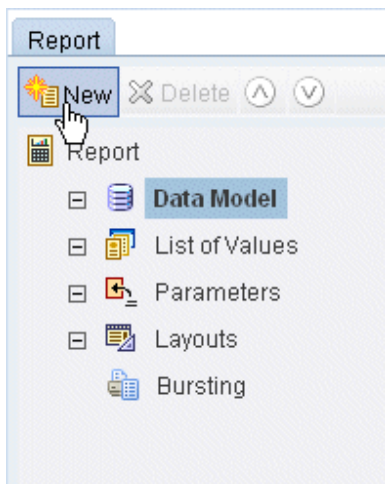
2. Navigate to **My Folders>Learn**, and click **Create a new report**.



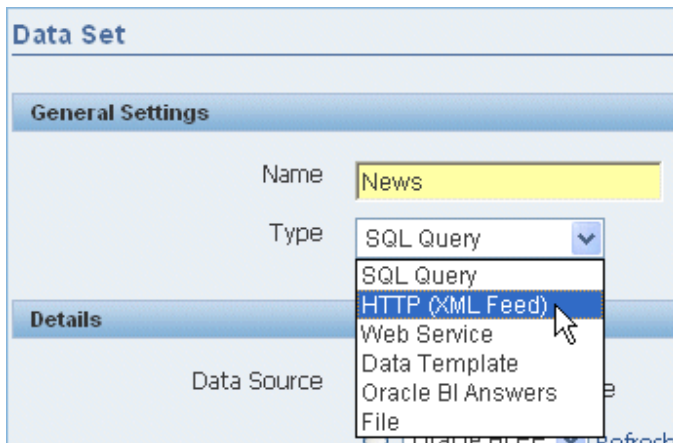
Enter **Based on HTTP-RSS** as the name of the report, and click **Create**.



- Click the **Edit** link below the name of the report.
Select **Data Model** node on the left and click **New** to define a new data model for the report.



- Click the **New Data Set1** created. The **Data Set** page is displayed on the right.
Enter **News** in the **Name** field, and select **HTTP (XML Feed)** from the **Type** drop-down list.



Data Set


General Settings

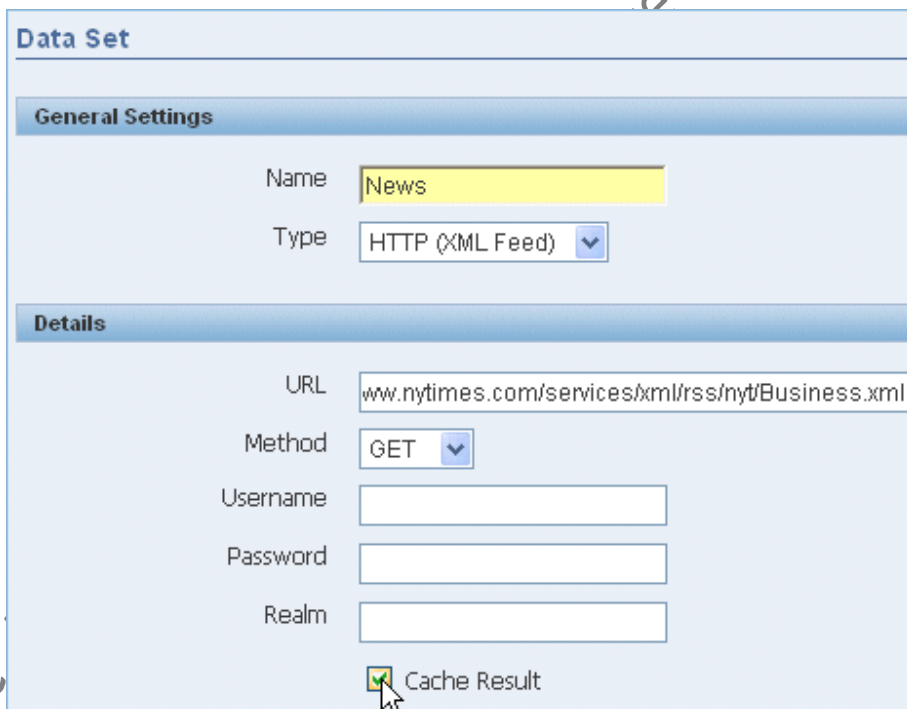
Name: News

Type: SQL Query (dropdown menu open showing: SQL Query, HTTP (XML Feed), Web Service, Data Template, Oracle BI Answers, File)

Details

Data Source:

5. Enter <http://www.nytimes.com/services/xml/rss/nyt/Business.xml> as the **URL**, select **GET** from the **Method** drop-down list, and select the **Cache Results** option. (Observe the screen below.) Click **Save**  to save the report.



Data Set

General Settings

Name: News

Type: HTTP (XML Feed)

Details

URL: www.nytimes.com/services/xml/rss/nyt/Business.xml

Method: GET

Username:

Password:

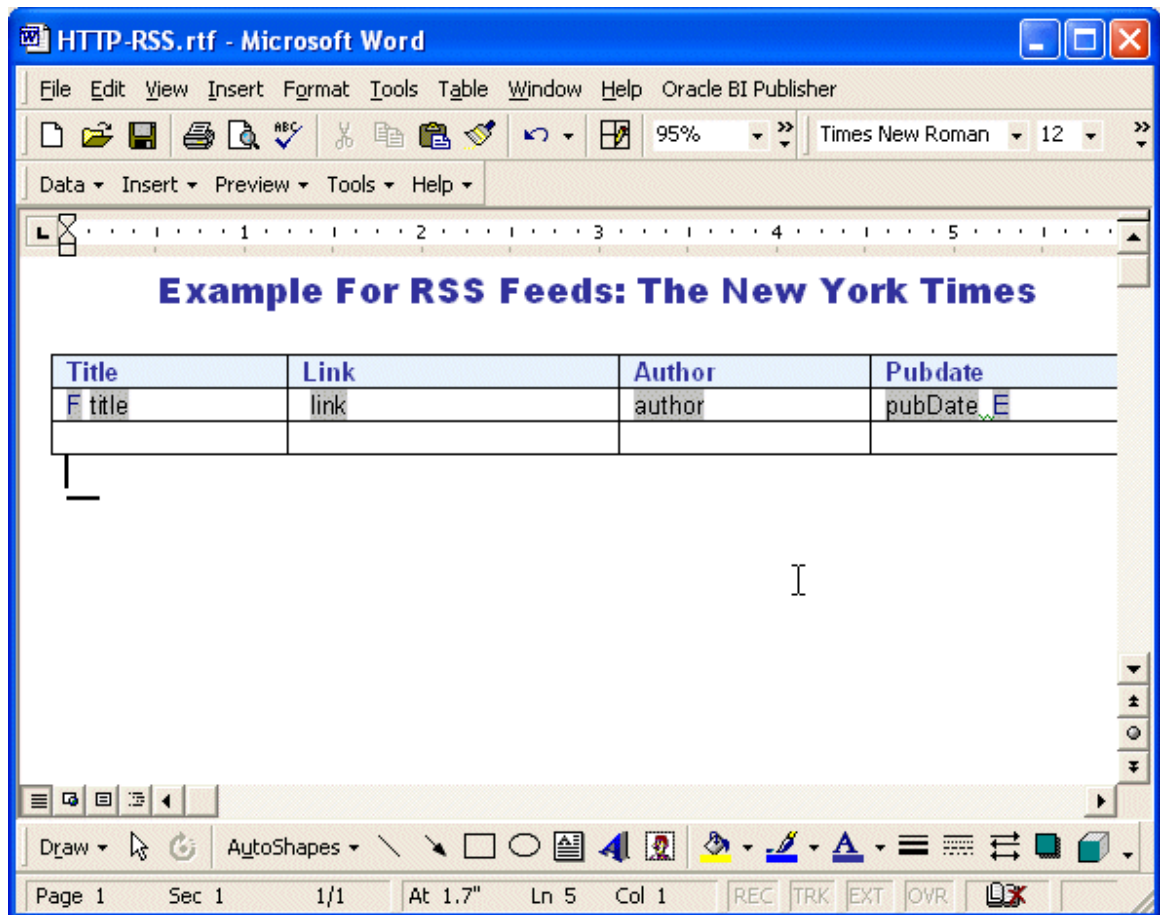
Realm:

☒ Cache Result

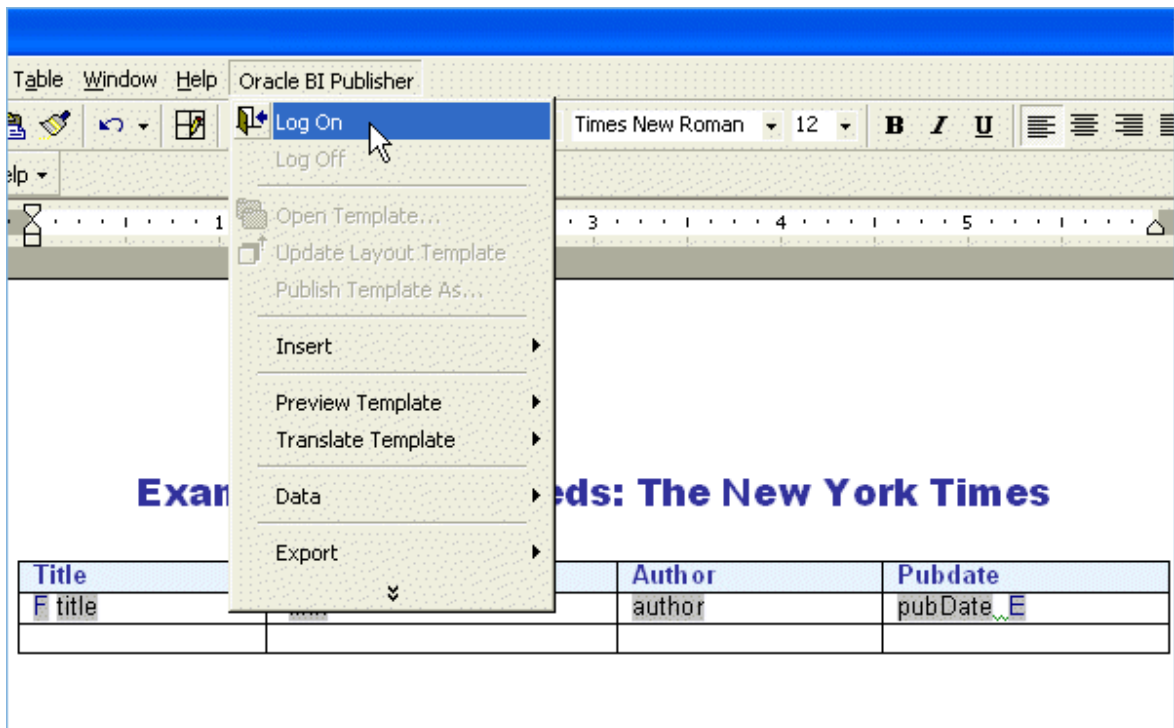
You can view the XML data to check whether this news site is rendering valid data to the report.



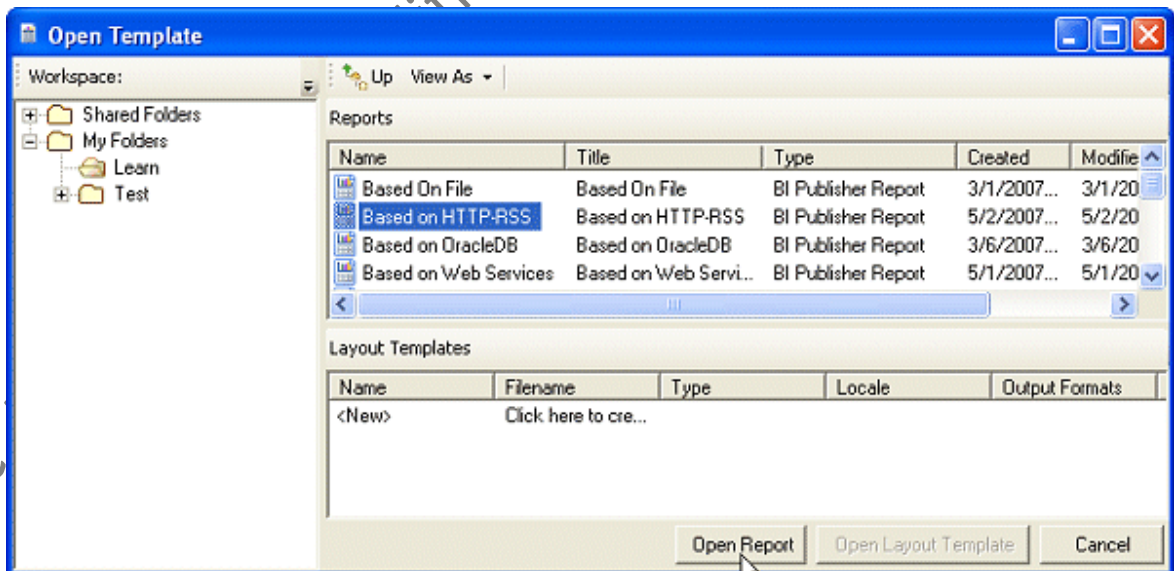
6. Open the [HTTP-RSS.rtf](#) template file (provided with this OBE) and save it with the same name in your local system. Now open this file in MS Word. The file looks like this:



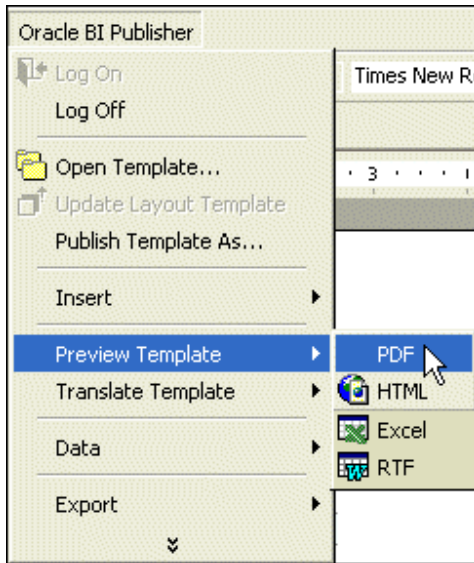
7. (If not connected) Connect to Oracle BI Publisher as **Administrator** in MS Word.



8. This opens the **Open Template** window.
 Navigate to **My Folders> Learn**.
 Select **Based on HTTP-RSS** report and click **Open Report**.



9. Select the **BI Publisher > Preview Template > PDF** option from the menu to preview the data in the report using this template.



Adobe Reader - [1178109093573out.pdf]

File Edit View Document Tools Window Help

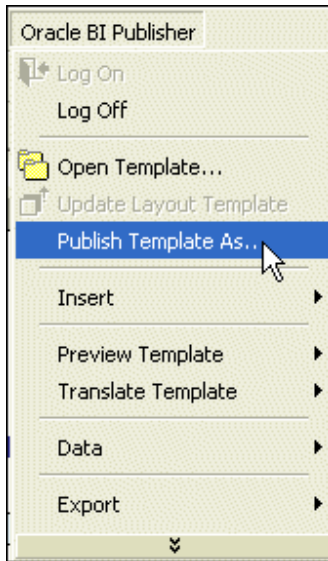
Save a Copy Search Select 100%

Example For RSS Feeds: The New York Times

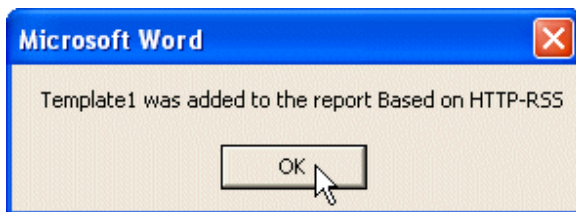
Title	Link	Author	Pubdate
NYT > Business	http://www.nytimes.com/pages/business/index.html?partner=rssnyt	JOE NOCERA	Wed, 02 May 2007 07:46:06 EDT
NYT > Business	http://www.nytimes.com/pages/business/index.html?partner=rssnyt	STUART ELLIOTT	Wed, 02 May 2007 03:15:20 EDT
NYT > Business	http://www.nytimes.com/pages/business/index.html?partner=rssnyt	DAVID LEONHARDT	Wed, 02 May 2007 02:56:49 EDT
NYT > Business	http://www.nytimes.com/pages/business/index.html?partner=rssnyt	ALAN COWELL	Wed, 02 May 2007 02:42:07 EDT
NYT > Business	http://www.nytimes.com/pages/business/index.html?partner=rssnyt	NICK BUNKLEY	Wed, 02 May 2007 02:39:46 EDT
NYT > Business	http://www.nytimes.com/pages/business/index.html?partner=rssnyt	RICHARD SIKLOS and ANDREW ROSS SORKIN	Wed, 02 May 2007 02:32:22 EDT
NYT > Business	http://www.nytimes.com/pages/business/index.html?partner=rssnyt	CLAUDIA H. DEUTSCH	Wed, 02 May 2007 02:27:21 EDT
NYT > Business	http://www.nytimes.com/pages/business/index.html?partner=rssnyt	CLIFFORD KRAUSS	Wed, 02 May 2007 02:18:01 EDT
NYT > Business	http://www.nytimes.com/pages/business/index.html?partner=rssnyt	ELIZABETH OLSON	Wed, 02 May 2007 02:08:58 EDT

1 of 3

10. Select the **BI publisher> Publish Template As** option to publish the template for this report. Enter **Template1** (or any other appropriate name) as the template name, and click **OK**.



Click **OK** again when the following message is displayed.



If you have time, try creating the reports using the RSS feeds available on the Oracle Web site at : <http://www.oracle.com/rss/index.html>, or those available on Yahoo at: <http://news.yahoo.com/rss>.

[Back to Topic](#)

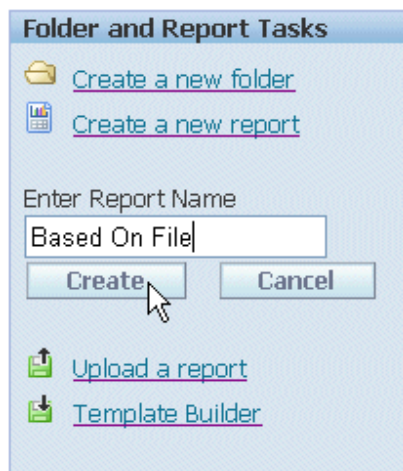
Creating a Report Based on File Data Set

In this topic, you create a report based on File data set. You will use the XML demo files provided along with the BI Publisher.

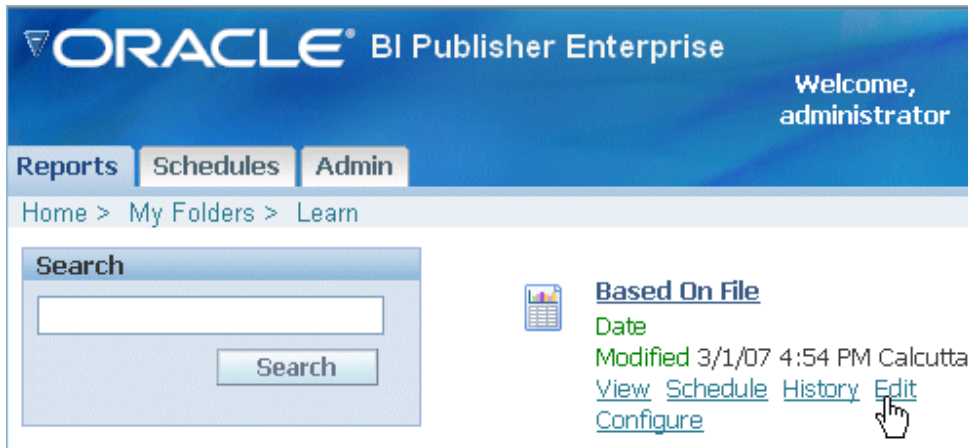
Note: The demo files are generally found in the <Oracle Home>/xmlp/XMLP/DemoFiles directory. Check with your administrator for the exact path.

To create a BI Publisher report from a File data set, perform the following steps: (Here you will be using a purchase order data set from the demo files, and also upload a predefined template for the report.)

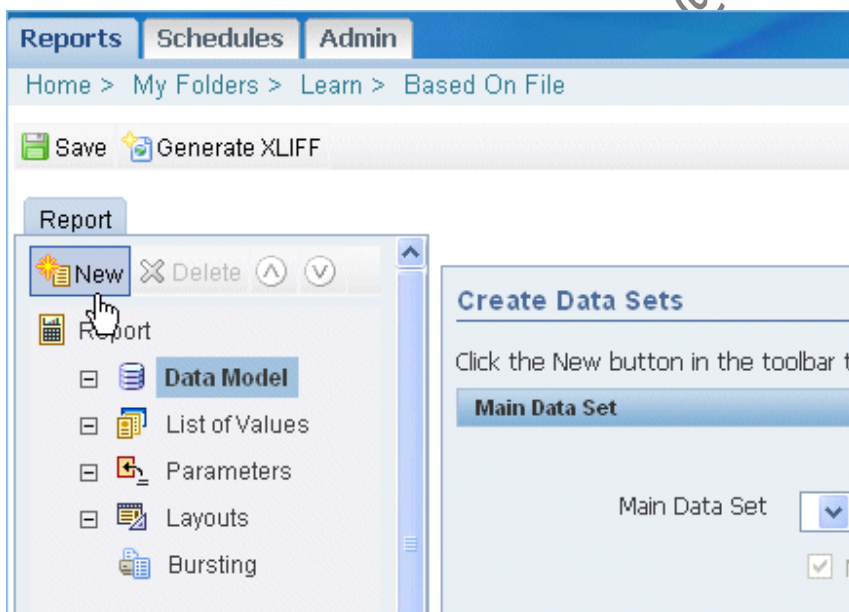
1. Navigate to **My Folders> Learn**, and click **Create a New Report**. Enter **Based on File** as the name of the report and click **Create**.



2. The report is displayed in Learn folder in BI Publisher.
Click the **Edit** link under the name of the report to open the report in Edit mode.



3. Click **Data Model** (found on the left of the **Report Properties** page) and click **New** to define the data source for this report.



4. In the **Data Set** screen that appears:

- Select **File** from the **Type** drop-down list
- ensure that **demo files** is selected as the **Data Source**
- and enter **PODataSample.xml** as the file name
- Click **Save** to save the report

Data Set

General Settings

Name: New DataSet 1

Type: SQL Query (dropdown menu open showing options: SQL Query, HTTP (XML Feed), Web Service, Data Template, Oracle BI Answers, File)

Details

Data Source: demo files

Refresh Data Source List

Reports | Schedules | Admin

Home > My Folders > Learn > Based On File

View | Schedule | History | Edit | Configure

Save | Generate XLIFF

Data Set

General Settings

Name: New DataSet 1

Type: File

Details

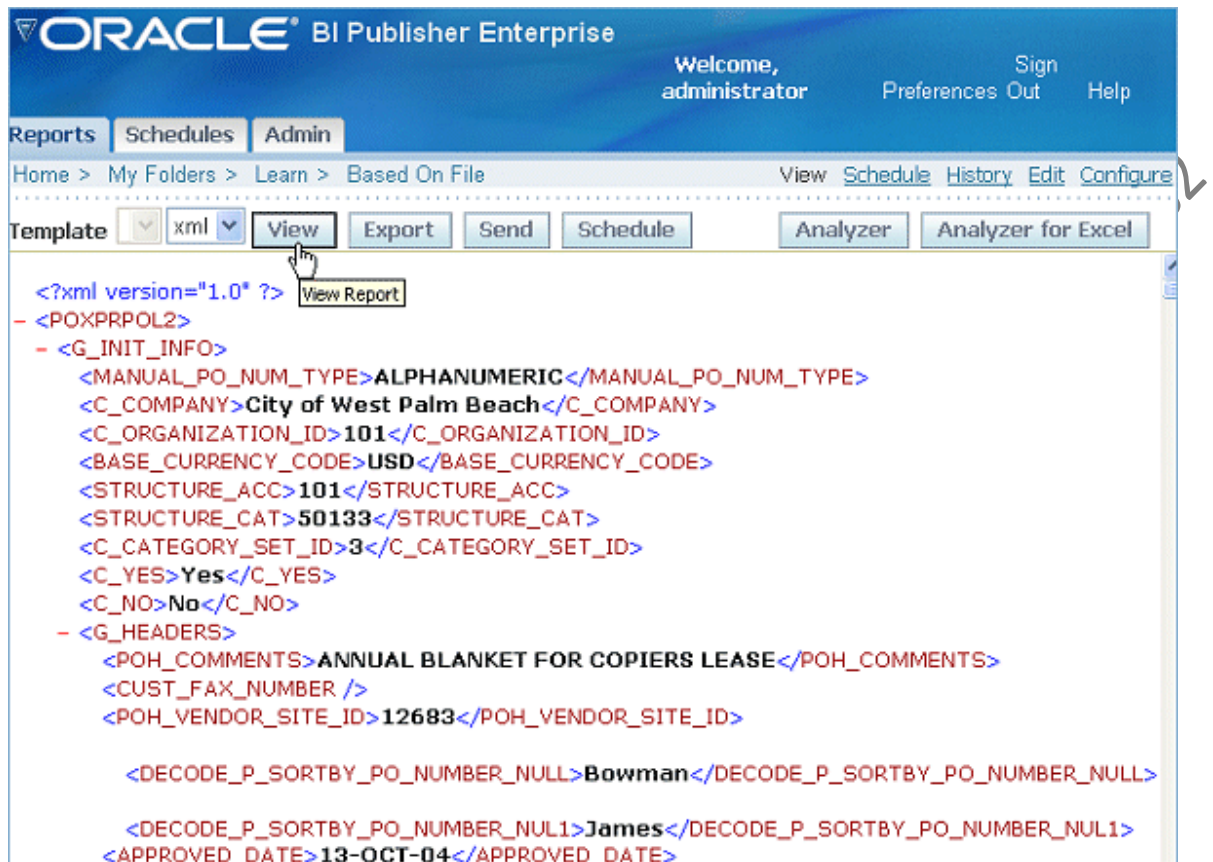
Data Source: demo files

File Name: PODataSample.xml

Report

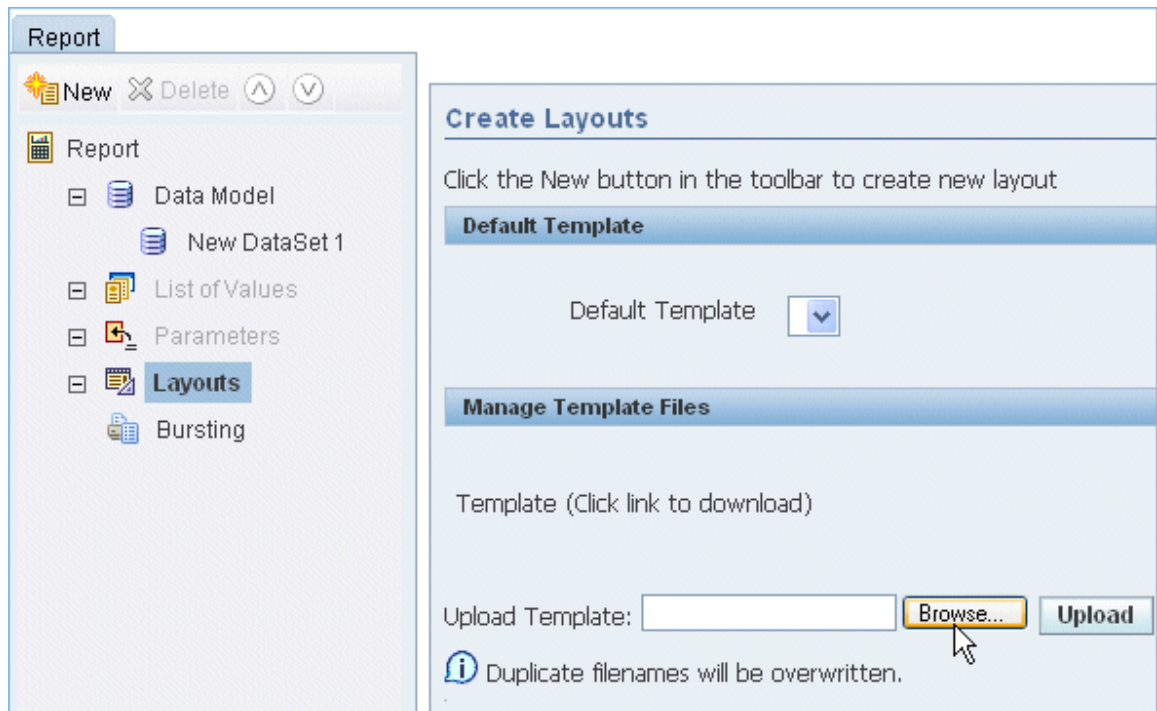
- Data Model
- New DataSet 1**
- List of Values
- Parameters
- Layouts
- Bursting

5. Click View to go to the View mode of the report.
Click View again to view the XML data. (A portion of the sample purchase order XML data is shown here.)

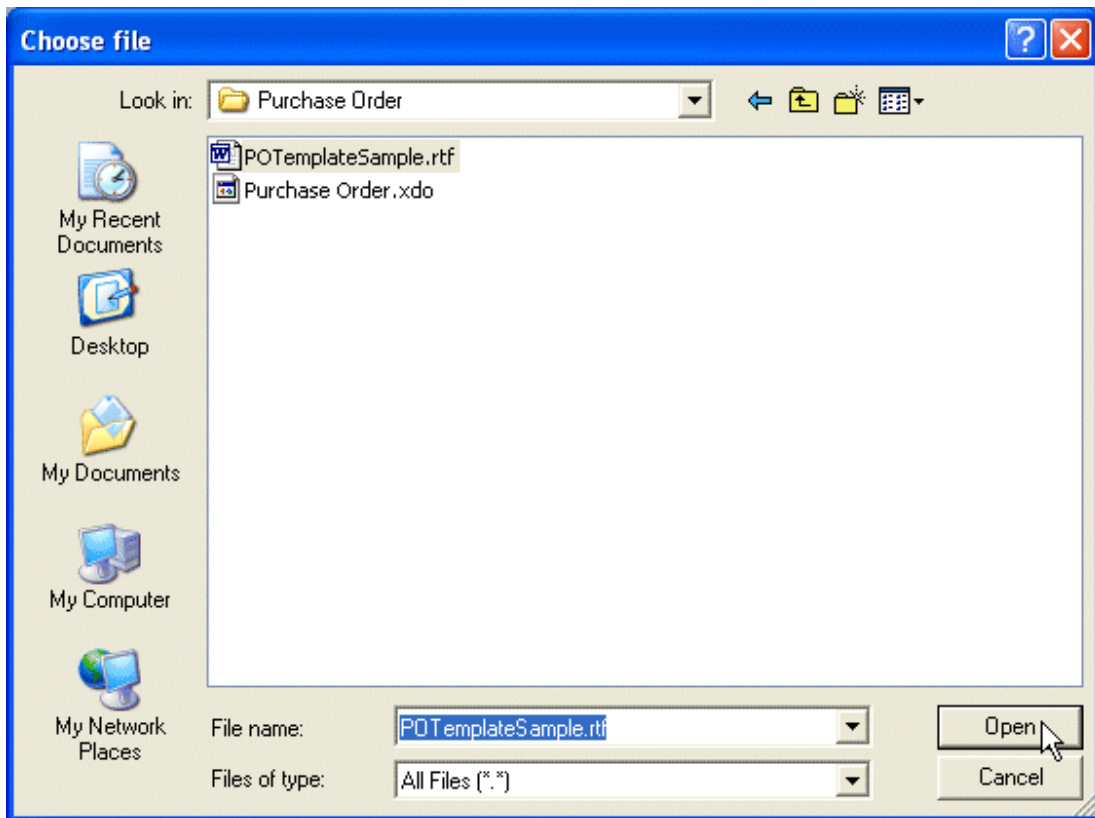


Note: As you have not associated the report with any template, you can see only XML data. However, in the next step, you will define a layout for the report and associate it with a predefined template. A set of predefined templates are also shipped along with the demo XML files in BI Publisher. (These templates are generally found in <Oracle Home>/xmlp/XMLP/Reports which has many folders with various RTF templates.)

6. In **View** mode of the report, click the **Edit** link (found at the top-right corner of the page) to go back to edit mode of the report.
Click **Layouts** in the **Report** pane on the left.
This displays the **Create Layouts** section on the right. Click **Browse** in the **Manage Template Files** section to browse and upload a predefined RTF template.




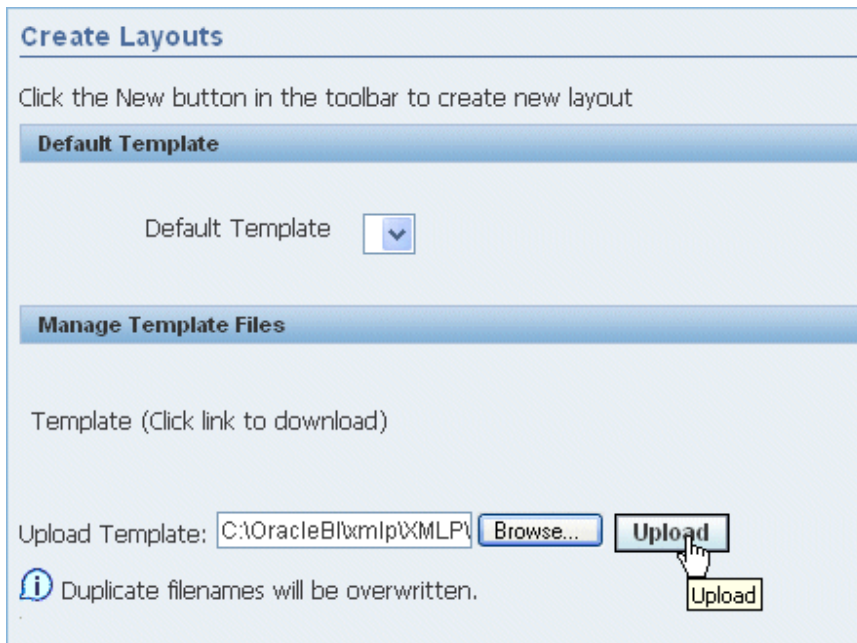
Navigate to the <Oracle Home>/xmlp/XMLP/Reports> Supply Chain management>Purchase Order folder. Select the POTemplateSample.rtf file and click Open.



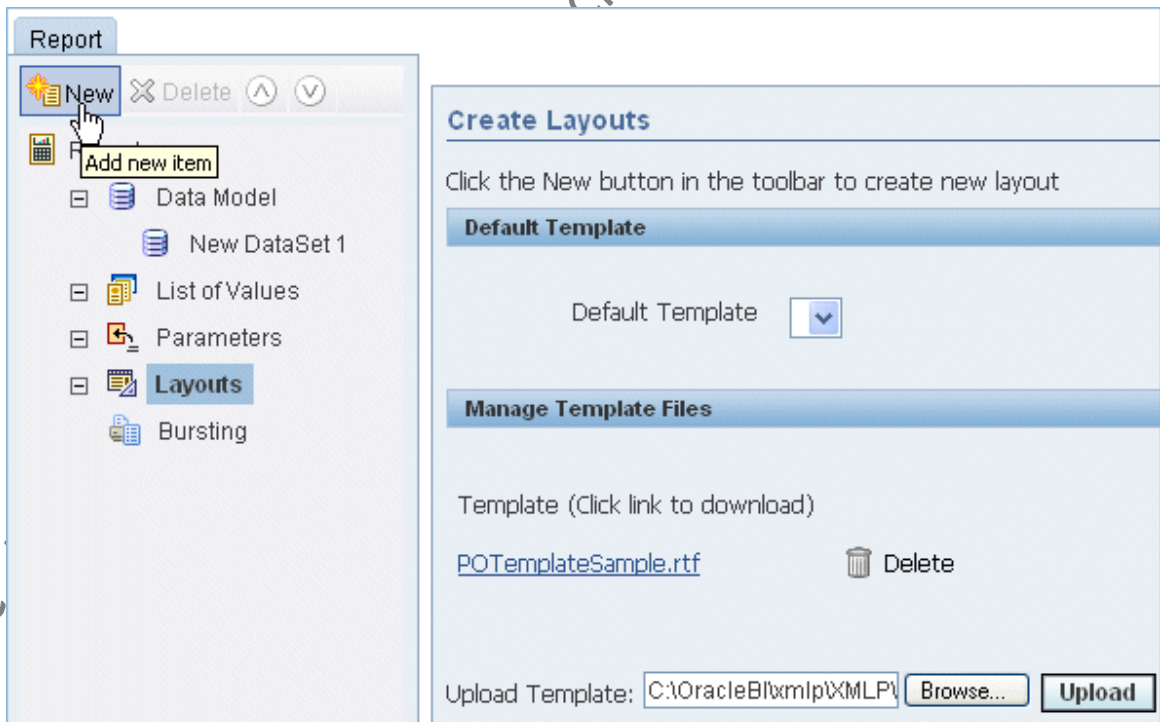
(If you are not able to locate this file, check with your administrator to locate the demo files and the templates shipped with BI Publisher, which has many folders with various RTF templates).

Note: You can publish a template from MS Word. Previously you have published the templates from MS Word, so in this topic, uploading a predefined template from BI Publisher (Web) is shown.


7. Click **Upload** to upload this RTF template for the report.
Click Save  to save the layout changes to the report.

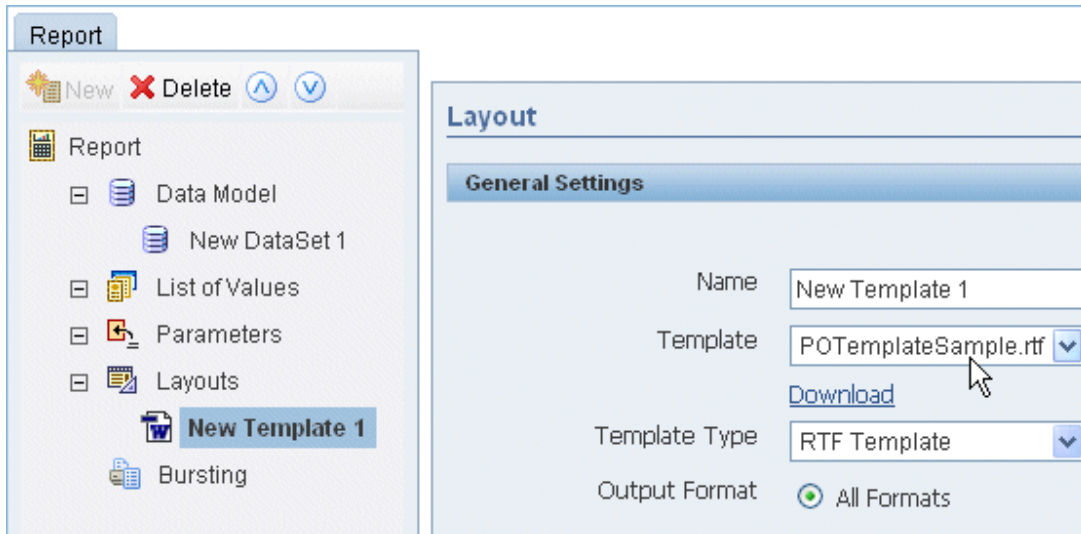


8. Click **Layouts** again, and click **New** to create a new report Layout to associate it with the template uploaded.



9. In the **Layout** section, that is displayed on the right make sure that **POTemplateSample.rtf** is selected from the **Template** drop-down list and **All formats** is selected as the **Output Format**.

Click Save  again to save the report layout.



The screenshot displays the 'Report' configuration interface. On the left, a tree view under the 'Report' tab shows a hierarchy: 'Report' (expanded) contains 'Data Model', 'List of Values', 'Parameters', 'Layouts', and 'New Template 1'. The 'New Template 1' item is highlighted. On the right, the 'Layout' tab is active, showing 'General Settings'. The settings include: 'Name' (New Template 1), 'Template' (POTemplateSample.rtf), 'Template Type' (RTF Template), and 'Output Format' (All Formats). A 'Download' link is also visible below the Template field.

10. Click **View** to open the report in View mode.
Select the template that you have uploaded from the **Template** drop-down list, select **pdf** as the data format from the drop-down list, and click **View** to view the report.

ORACLE® BI Publisher Enterprise

Welcome, administrator Sign Out Preferences Help

Reports Schedules Admin

Home > My Folders > Learn > Based On File View Schedule History Edit Configure

Template: New Template 1 pdf View Export Send Schedule Analyzer Analyzer

83%

ORACLE® PURCHASE ORDER

Oracle Corporation
500 Oracle Parkway
Redwoodshores
CA 94065
Tel: 650 506 7000

Vendor:
XEROX CORPORATION
15160 NW 79 COURT
ATTN - LILY BERTRAN
MIAMI LAKES, FL 33016
Vendor Contact: - Vendor Tel: ()

Ship To:
AS SPECIFIED
West Palm Beach, FL 33401

Purchase Order No: 050734

Deliver By :	
FOB :	DESTINATION
Terms :	PRE-PAY AND ADD
Buyer :	J Bowman
Issue Date :	12-OCT-04
Page :	1 of 3 Revision: 0

Bill To:
City of West Palm Beach/Accounts Payables
PO Box 3366
West Palm Beach, FL 33402
Tel: (561) 822-2100 ~ Fax: (561) 835-0028
Vendor FAX:

LINE	QUANTITY	UOM	DESCRIPTION	UNIT PRICE	EXTENDED PRICE
1		US Dollar	ANNUAL BLANKET ORDER FOR LEASE OF COPIERS:		
2		US Dollar	COPIER - CTF000884 - MONTHLY COST \$1080.95	1.00	12,967.20
3		US Dollar	COPIER - ND8087842 - MONTHLY COST \$778.22	1.00	9,338.64
4		US Dollar	COPIER - FWT007387 - MONTHLY COST \$384.41	1.00	4,732.02
5		US Dollar	COPIER - FWT017872 - MONTHLY COST \$384.41	1.00	4,732.02
6		US Dollar	COPIER - FWK001829 - MONTHLY COST \$293.73	1.00	3,524.76
7		US Dollar	COPIER - NL2023954 - MONTHLY COST \$195.71	1.00	2,384.52
8		US Dollar	COPIER - NL2040352 MONTHLY COST \$176.50	1.00	2,118.00
9		US Dollar	COPIER - MRN019818 - MONTHLY COST \$892.71	1.00	8,312.52
10		US Dollar	COPIER - LVG255136 MONTHLY COST \$499.62	1.00	5,999.04
11		US Dollar	COPIER - FU2041553 - MONTHLY COST \$50.00	1.00	600.00
12		US Dollar	COPIER - RDT583190 - MONTHLY COST \$2586.78	1.00	31,041.36
13		US Dollar	COPIER - H2L110201 - MONTHLY COST \$8254.13	1.00	75,040.58
14		US Dollar	COPIER - RDF830148 - MONTHLY COST \$900.63	1.00	10,807.56
		US Dollar	COPIER - PUW785441 - MONTHLY COST \$211.15	1.00	2,533.80

Scroll down and see the report.

Home > My Folders > Learn > Based On File View Schedule History Edit Configure

Template New Template 1 pdf View Export Send Schedule Analyzer Analyzer 1

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8	US Dollar	COPIER - MINOT18816 - MONTHLY COST \$692.71	1.00	8,312.82
9	US Dollar	COPIER - LVG255138 MONTHLY COST \$499.82	1.00	5,999.04
10	US Dollar	COPIER - FU2041553 - MONTHLY COST \$50.00	1.00	600.00
11	US Dollar	COPIER - RDT583190 - MONTHLY COST \$2588.78	1.00	31,041.36
12	US Dollar	COPIER - H2L110201 - MONTHLY COST \$8254.13	1.00	75,049.56
13	US Dollar	COPIER - RDT630148 - MONTHLY COST \$900.83	1.00	10,807.56
14	US Dollar	COPIER - PUW785441 - MONTHLY COST \$211.15	1.00	2,533.80
15	US Dollar	COPIER - PVK540238 - MONTHLY COST \$948.15	1.00	11,377.80
			TOTAL:	\$ Continued

All Deliveries must be made Monday-Friday between 7:30 AM & 3:30 PM.
Purchase Order number must appear on all invoices, packing slips and correspondence.
By accepting this Purchase Order, seller agrees to terms & conditions on the front and reverse sides hereof, and any attachments hereto.

Tax Exemption Certification Numbers:
Federal: 11-234-6878
State: 11-123456789C-1

BELOW FOR INTERNAL CITY USE

DELIVER TO: ANNUAL BLANKET FOR COPIERS LEASE

J Bowman
AUTHORIZED SIGNATURE

LINE	REQUISITION	FUND	CC	TFA	ACCOUNT	PROJECT	AMOUNT	DEPARTMENT AUTHORIZER
1	92732	502	019290	590	500440	00000000	12,987.20	Thomas, William C
2		502	019290	590	500440	00000000	9,338.84	Thomas, William C
3		502	019290	590	500440	00000000	4,732.92	Thomas, William C
4		502	019290	590	500440	00000000	4,732.92	Thomas, William C
5		502	019290	590	500440	00000000	3,524.76	Thomas, William C
6		502	019290	590	500440	00000000	2,384.52	Thomas, William C
7		502	019290	590	500440	00000000	2,115.00	Thomas, William C
8		502	019290	590	500440	00000000	8,312.52	Thomas, William C
9		502	019290	590	500440	00000000	5,999.04	Thomas, William C
10		502	019290	590	500440	00000000	600.00	Thomas, William C
11		502	019290	590	500440	00000000	31,041.36	Thomas, William C
12		502	019290	590	500440	00000000	75,049.56	Thomas, William C
13		502	019290	590	500440	00000000	10,807.56	Thomas, William C
14		502	019290	590	500440	00000000	2,533.80	Thomas, William C
15		502	019290	590	500440	00000000	11,377.80	Thomas, William C

1 of 5

Note: You can also try and create BI Publisher reports based on the other demo files such as Marketing.xml, Balance.xml, PriceList.xml, or any other XML data file that you have. (All the demo files have been provided with predefined templates.)

[Back to Topic](#)

[Back to Topic List](#)

Summary

In this tutorial, you learned how to:

- ❑ Create a BI Publisher report based on Oracle Database
- ❑ Create an RTF template with a table and chart using BI Publisher desktop in MS Word
- ❑ Publish the template for a report
- ❑ Modify the template using the native features of MS Word
- ❑ Create and publish multiple templates for a BI Publisher report

- ☑ View data in BI Publisher reports using the templates in various formats supported
- ☑ Create a report with parameters and list of values
- ☑ Schedule and manage the BI Publisher reports
- ☑ View the saved output in scheduled report history
- ☑ Create a BI Publisher reports based on other data sources, such as Oracle BI EE, HTTP, Web Services, and File data sets

[Back to Topic List](#)

Related Information

To learn more about Oracle Business Intelligence, you can refer to:

- ☑ Additional [OBEs](#) on BI Publisher.
- ☑ Additional [OBEs](#) on BI on the OTN Web site.

[Back to Topic List](#)



Place the cursor over this icon to hide all screenshots.