

Oracle BI Publisher



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Oracle BI Publisher: Overview

❖ Introduction:

This chapter explains the steps to create a BI Publisher report templates and explains how to create a BI Publisher report based on Oracle BI Answers request and BI Subject area.

Oracle BI Publisher: Objectives

❖ Objective:

After completing this chapter you will be able to:

- ◆ **Create BI Publisher report From Any Database .**
- ◆ **Create BI Publisher report based on Oracle BI Answers request .**
- ◆ **Create BI Publisher report based on Oracle BI Server Subject Area**
- ◆ **Explain how templates are used to build reports**
- ◆ **Generate multiple report formats such as HTML, RTF and PDF**

Why you need to know:

- ◆ **BI Publisher allows report designers to reuse queries to build reports in many formats**



Oracle BI Publisher

- ❖ **Powerful report generation tool**
- ❖ **Creates standardized reports quickly and easily**
- ❖ **Originally intended to support Oracle's ERP tools such as Oracle E-Business Suite, JD Edwards and PeopleSoft**
- ❖ **BI Publisher is now available as a separate product or as part of Oracle BI Suite Enterprise Edition**



Accessing Oracle BI Publisher

- ❖ Use the URL provided by the system administrator to log into Oracle BI Publisher

ORACLE[®] BI Publisher Enterprise

Username: Administrator

Please contact administrator for your username/password.

Password:

Sign In

☐ Accessibility Mode

English

Select Accessibility mode to render the Reports home page in an accessible tree structure

Specify the language preference here

Reports Home Page

- ❖ Reports home page displays two main reports folders:
 - ◆ Shared Folders contain the reports and folders you have been granted access to based on your role
 - ◆ My Folders contain the reports and folders your administrator has assigned to you and the reports you have created (if you have the BI Publisher Developer or Administrator role)



Viewing Reports

- From the Folder view, click the report name or the view link to run the report and view online

ORACLE® BI Publisher Enterprise Welcome

Reports Schedules Admin

Home > Shared Folders > Financials

Search

Search

Folder and Report Tasks

- Create a new folder
- Create a new report
- Upload a report

Click the report name to view the report

Order Entry

Customer Orders

Balance Sheet

This is a E data source the data is German (Please check translation Date Modified View Schedule

Check Printing

Check print generation listing invoices paid and check stub at bottom of page including MICR fonts and signature images.
Date Modified 12/11/06 3:25 PM Pacific Time
View Schedule History Edit Configure

Departmental Expenses

This is a report is a Expenses' Employee

Viewing Reports (Contd.)

- The report runs using the default options and displays it in the browser

ORACLE® BI Publisher Enterprise

Reports Schedules Admin

Home > Shared Folders > Financials > Invoice Batch Report

Template Invoice Batch HTML View Export Send Schedule Analyzer Analyzer for Excel

Report Template

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Output format

Invoice

Invoice Address

Attn: Accounts Payable
Field Boxmore Healthcare Packaging
Nottingham
Phoenix Centre
Millenium Way West
Nottingham NG8 6AW

Oracle Corporation
500 Oracle Parkway
Redwood Shores
CA 94065
USA
Tel: + 650 507 000
Fax: + 650 507 000
www.oracle.com

Page 1 of 1

Invoice Information	
Invoice Number:	200402
Invoice Date:	29-JUL-04
Payment Terms:	Immediate

Viewing Reports (Contd.)

- Select the report output type from the drop down and click view button

The screenshot displays the Oracle BI Publisher Enterprise web interface. The top navigation bar includes 'Reports', 'Schedules', and 'Admin'. The breadcrumb trail shows 'Home > Shared Folders > Financials > Invoice Batch Report'. The 'Template' dropdown is set to 'Invoice Batch', and the output format dropdown is set to 'PDF'. The 'View' button is highlighted. A callout box points to the 'PDF' option in the format dropdown, labeled 'Available report formats'. Another callout box points to the 'View' button, labeled 'Select the report format and click the View button'. The main content area shows the 'Invoice' title and the 'Invoice Address' section with the following details:

Invoice Address

Attn: Accounts Payable
Field Boxmore Healthcare Packaging
Nottingham

Exporting Reports

- Select the Export button to export the report to the default application for its output type
 - ◆ Example - Adobe Acrobat for pdf output or Microsoft Excel for excel output



Report can be saved in pdf format



Scheduling Reports

- Click the Schedule button to schedule and send the report to users



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Reports Schedules Admin

Schedule Report

Specify the report template and format

Report Parameters

Template Invoice Batch Format HTML

Specify the job name, locale, time zone and calendar

Job Properties

* Job Name Invoice Batch Report

☐ Public

Report Formatting Locale English (United States)

☒ Save Data for Republish

Report Formatting Time Zone [GMT-7] Pacific Standard Time

☒ Save Output

Report Formatting Calendar Gregorian

☒ Use Unicode (UTF8)

Specify the email address to which a notification mail has to be sent on report completion or failure

Notification

Email Addresses

Notify When ☐ Report completed

☐ Report completed with warnings

☐ Report failed



Scheduling Reports (Contd.)

➤ Specify the recurrence and the delivery device

Specify the recurrence at which the report should be run

Time

Set the date/time based on the server's timezone.
This page was rendered at 3/31/10 12:18 AM Pacific Time

☒ Run Immediately
☐ Run Once
☐ Run Daily/Weekly
☐ Run Monthly

Delivery

Destination

☒ Email

* To Body

CC

BCC

Reply-To

Subject

Separate multiple email addresses with commas.

Specify the destination to which the reports should be sent

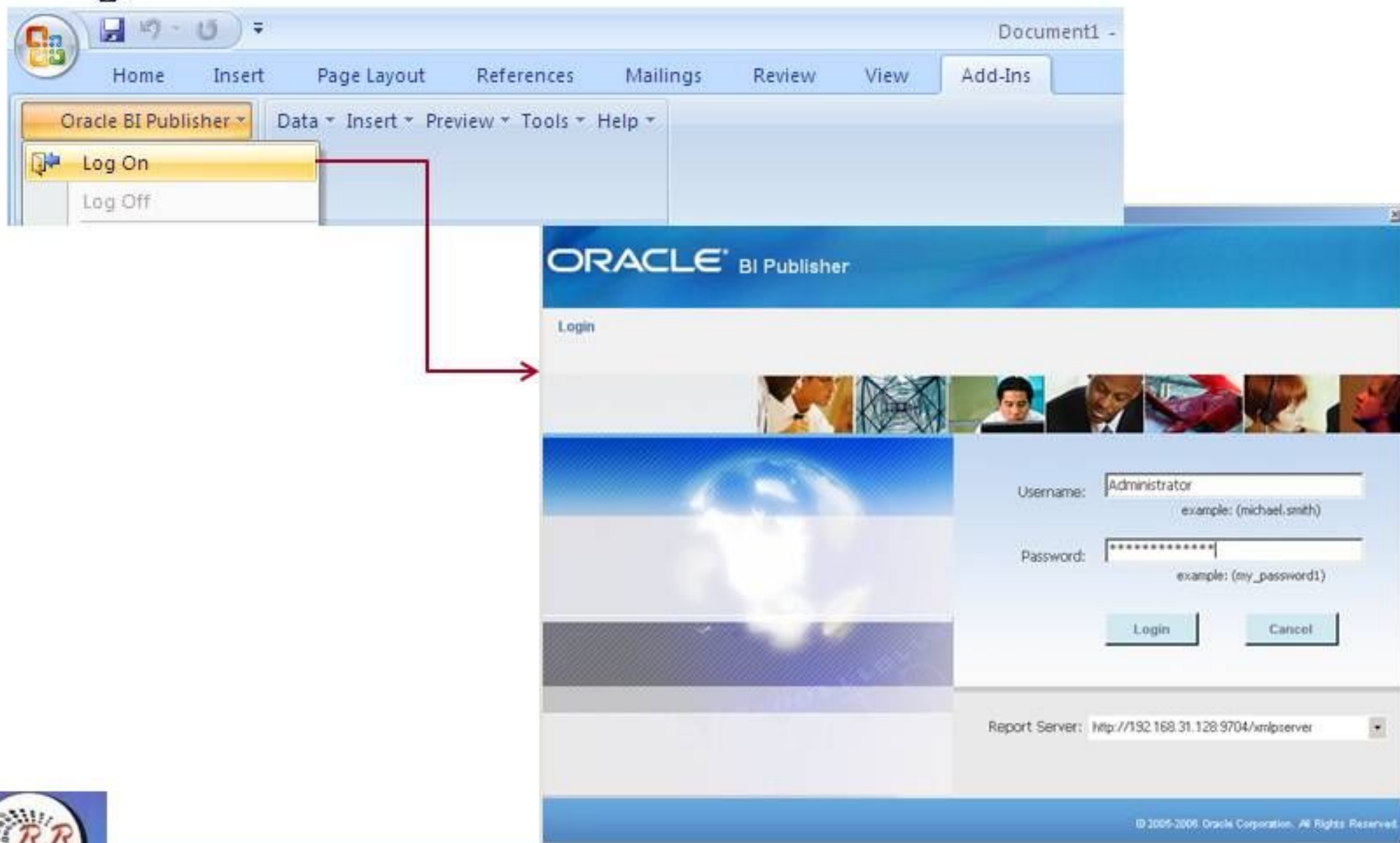
Different destinations can be added by clicking by the Add Destination button

Creating Reports

- ❖ **Oracle BI Publisher reports can be created based on various data sources:**
 - ◆ **Oracle BI Answers Request**
 - ◆ **Oracle BI Subject Area**
 - ◆ **Web Services**
 - ◆ **HTTP/RSS Data set**
 - ◆ **File Data Set**

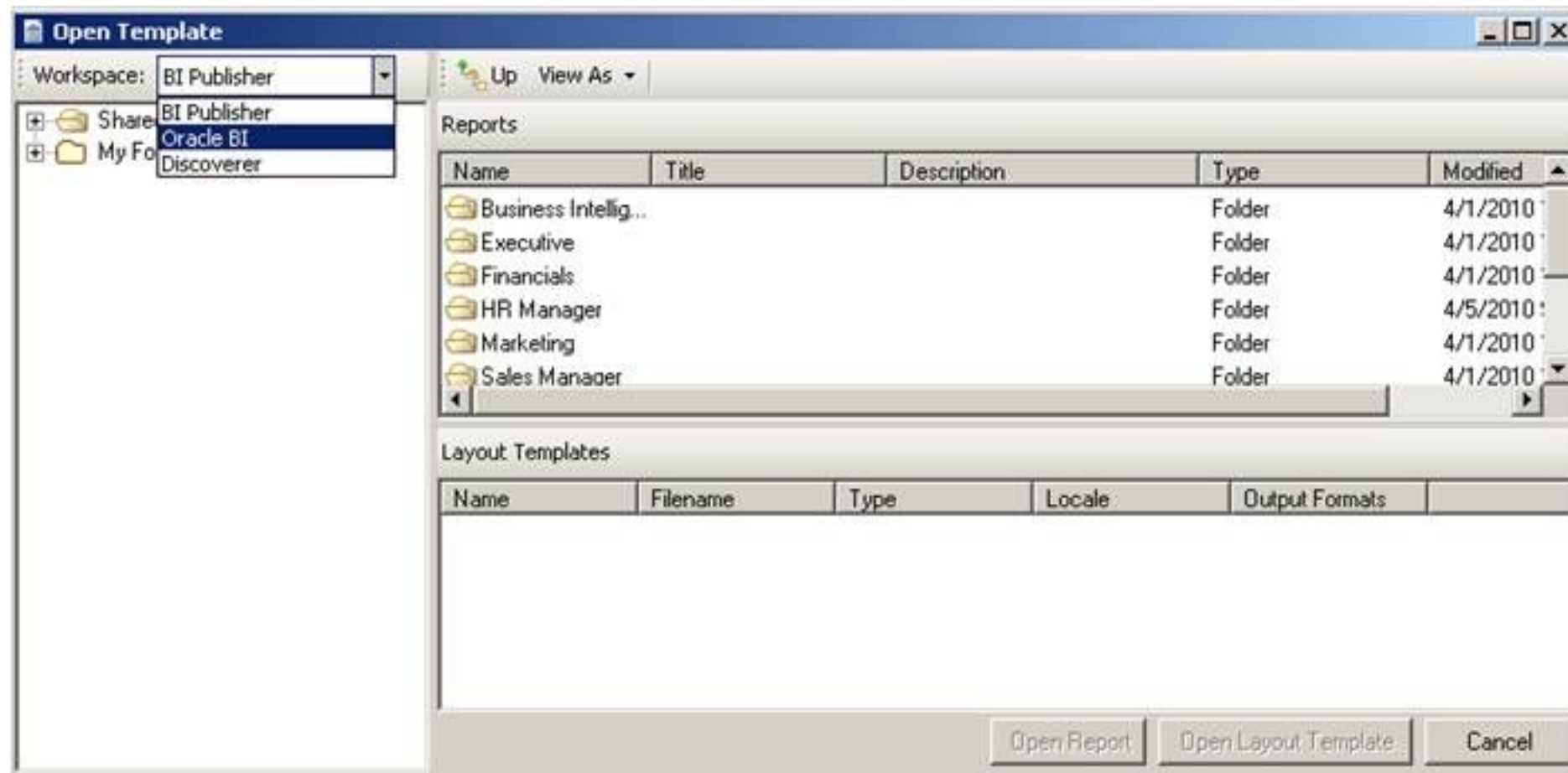
1. Report Based On Oracle BI Answers Request

➤ Log into Oracle BI Publisher as Administrator from Microsoft Word



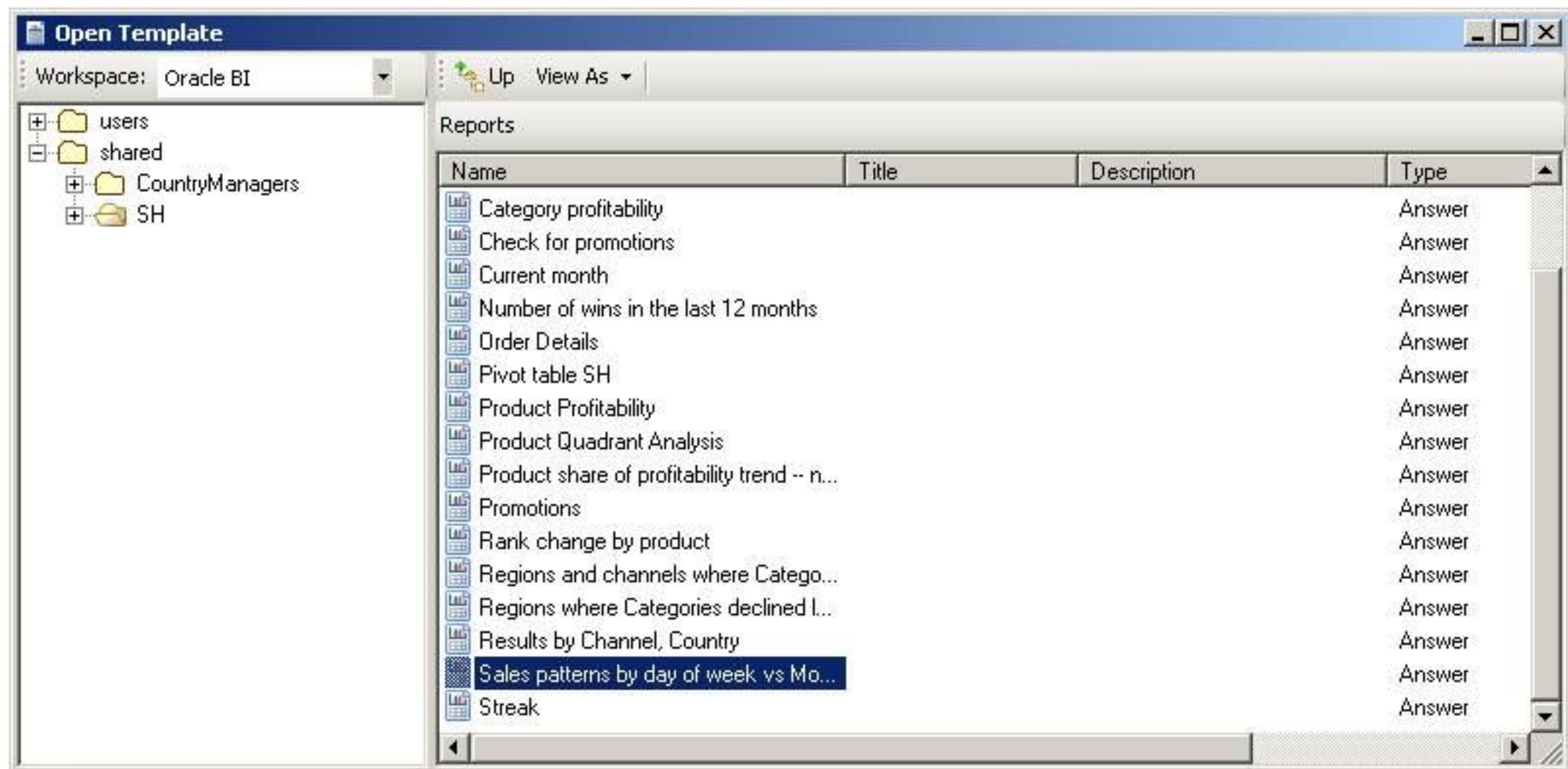
Report Based On Oracle BI Answers Request (Contd.)

- In the Open Template window, select Oracle BI from the workspace drop-down list



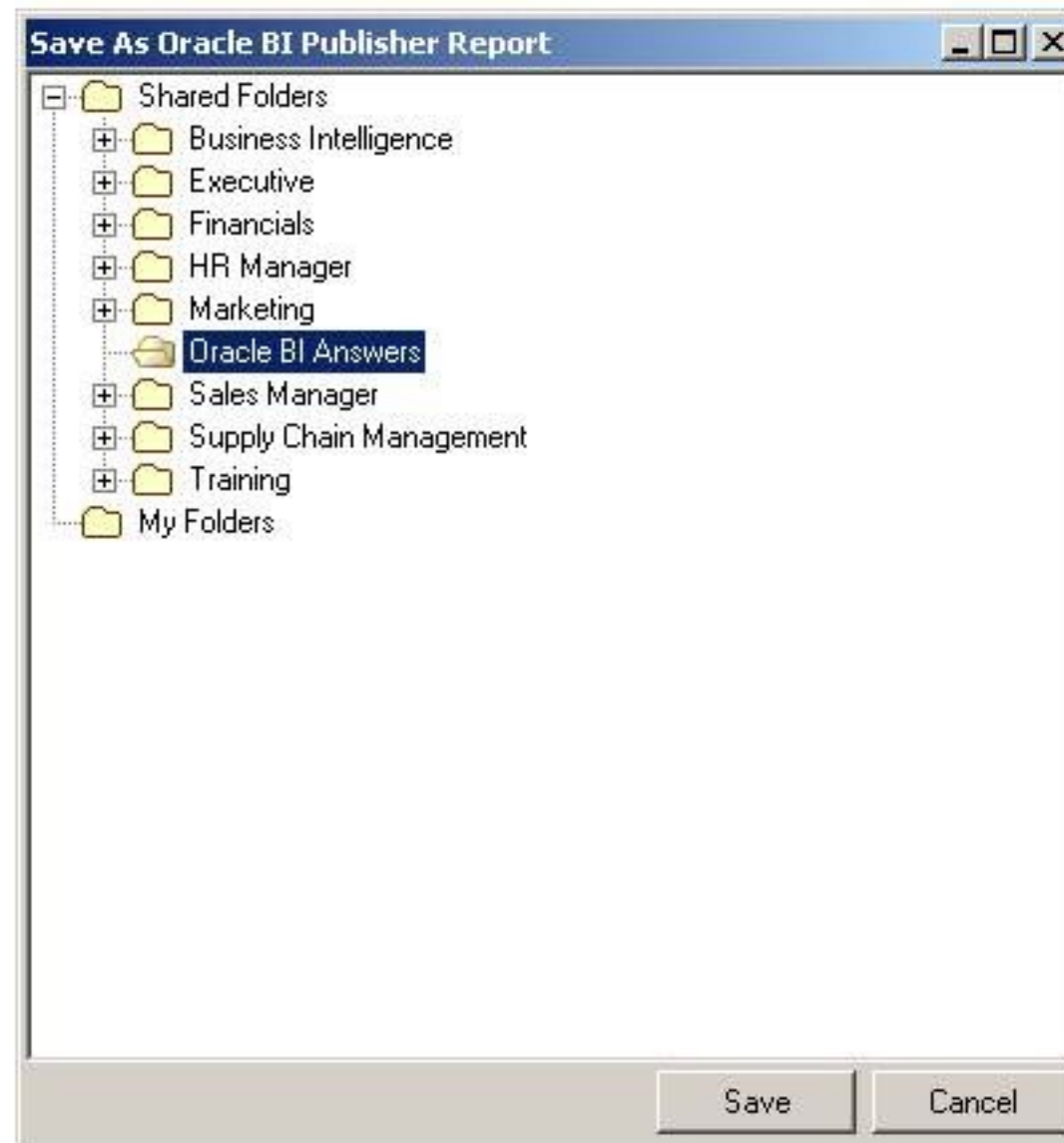
Select the Oracle BI Answers Request

- Select the Oracle BI Answers request based on which you want to create the BI Publisher report



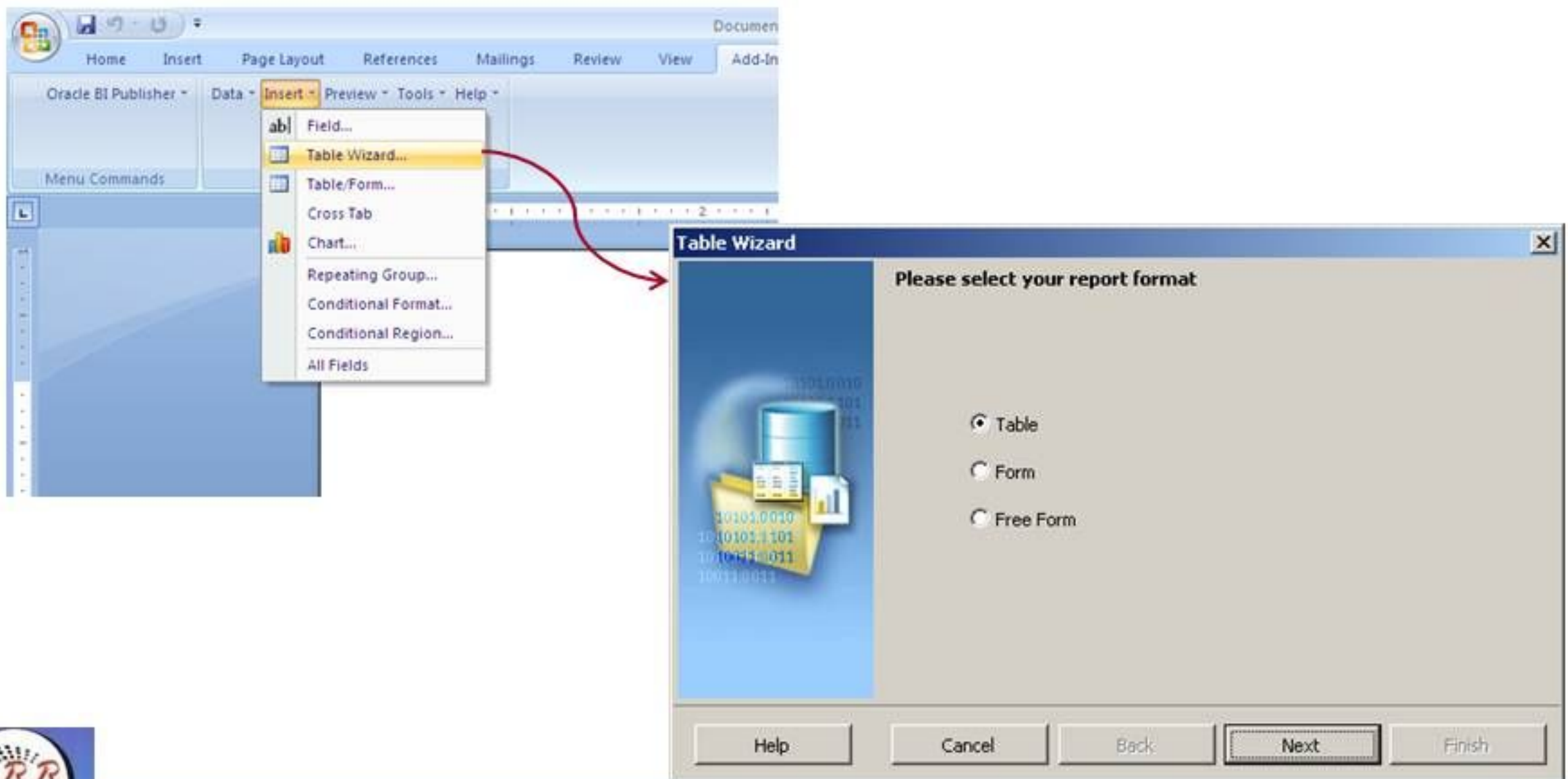
Select the Folder

- **Navigate to the folder in which you want to save the report, and click Save**



Insert the Report Views

- Insert the table/chart view of the report in the template



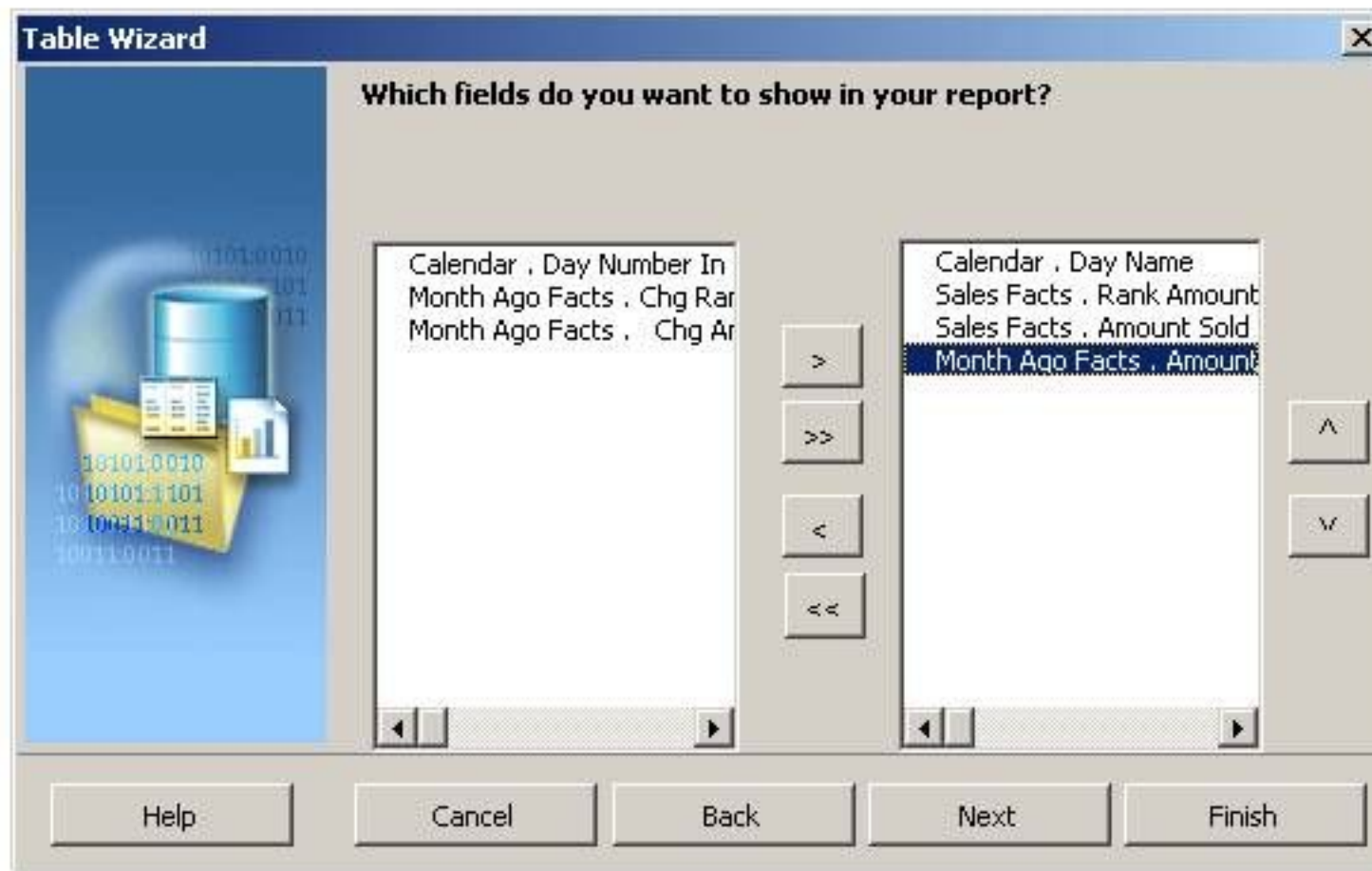
Select Grouping Field

- Select the grouping field you want to report on



Select the Report Fields

- Select the fields to be displayed in the report



Select the Group-By Fields

- Select the fields on which the report should be grouped

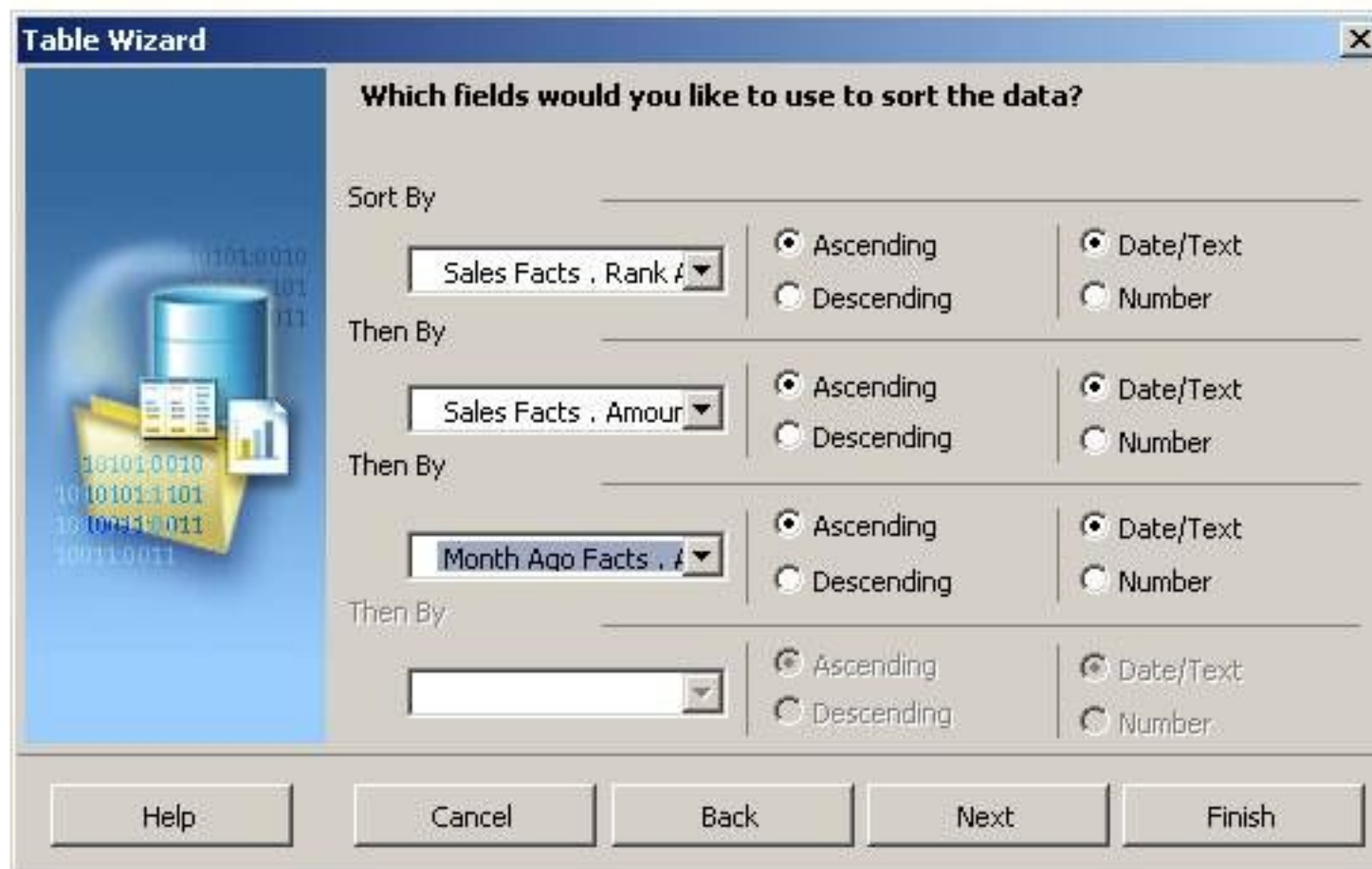


The screenshot shows the 'Table Wizard' dialog box with the title 'Table Wizard' and a close button. The main question is 'How would you like to group your report?'. On the left is a graphic of a database cylinder and folders with binary code. The dialog is divided into four sections for grouping, each with a 'Group By' field, a 'Then By' field, and two radio buttons: 'Group above' (selected) and 'Group left'. To the right of each radio button is a checkbox for 'Data already sorted'. At the bottom are five buttons: 'Help', 'Cancel', 'Back', 'Next', and 'Finish'.

Group By	Then By	Group above	Group left	Data already sorted
Calendar . Day Nam		<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
		<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
		<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>
		<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>

Select the Sorting Columns

- Select the fields on which the sorting should be applied:
 - ◆ Also, select the sorting order and sorting type



The screenshot shows the 'Table Wizard' dialog box with the title 'Which fields would you like to use to sort the data?'. The dialog is divided into two main sections. On the left is a graphic area with a blue background, a yellow folder icon, and a blue cylinder icon, with binary code (0s and 1s) scattered around. On the right is the configuration area. It contains four rows of settings, each starting with a 'Sort By' or 'Then By' label followed by a dropdown menu. To the right of each dropdown are two columns of radio button options: 'Ascending' and 'Descending' in the first column, and 'Date/Text' and 'Number' in the second column. The first row is labeled 'Sort By' and has 'Sales Facts . Rank #' selected. The second row is labeled 'Then By' and has 'Sales Facts . Amour' selected. The third row is labeled 'Then By' and has 'Month Ago Facts . #' selected. The fourth row is labeled 'Then By' and has an empty dropdown. At the bottom of the dialog are five buttons: 'Help', 'Cancel', 'Back', 'Next', and 'Finish'.

Field	Ascending	Descending	Date/Text	Number
Sort By: Sales Facts . Rank #	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Then By: Sales Facts . Amour	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Then By: Month Ago Facts . #	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Then By:	<input checked="" type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

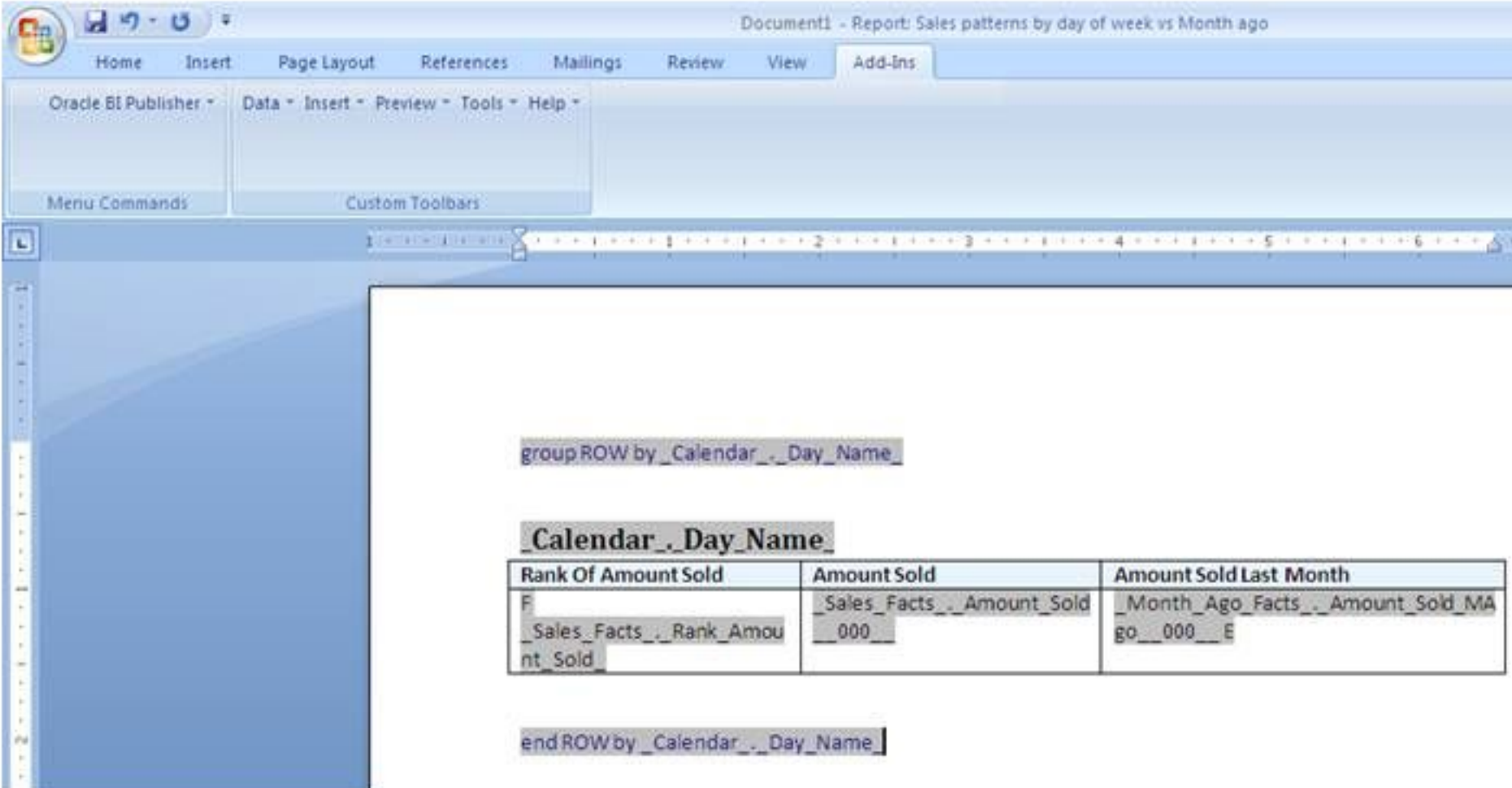
Rename the Columns

➤ Rename the columns



Basic Report Template

➤ Basic report template is created



The screenshot displays the Oracle BI Publisher interface. The title bar indicates the document is 'Document1 - Report: Sales patterns by day of week vs Month ago'. The ribbon includes 'Home', 'Insert', 'Page Layout', 'References', 'Mailings', 'Review', 'View', and 'Add-Ins'. Below the ribbon, there are sections for 'Oracle BI Publisher', 'Data', 'Insert', 'Preview', 'Tools', and 'Help'. The main workspace shows a report template with the following structure:

```
group ROW by _Calendar_._Day_Name_
```

<u>_Calendar_._Day_Name_</u>		
Rank Of Amount Sold	Amount Sold	Amount Sold Last Month
F _Sales_Facts_._Rank_Amount_Sold	_Sales_Facts_._Amount_Sold _000_	_Month_Ago_Facts_._Amount_Sold_MA go_000_E

```
end ROW by _Calendar_._Day_Name_
```


Customize the Template

- Customize the template to include images and headings



Sales Patterns - Report: Sales patterns by day of week vs Month ago Template: Sales Pattern

Home Insert Page Layout References Mailings Review View Add-Ins

Oracle BI Publisher Data Insert Preview Tools Help

Menu Commands Custom Toolbars

ORACLE

Sales Pattern

group ROW by _Calendar_ _Day_Name_

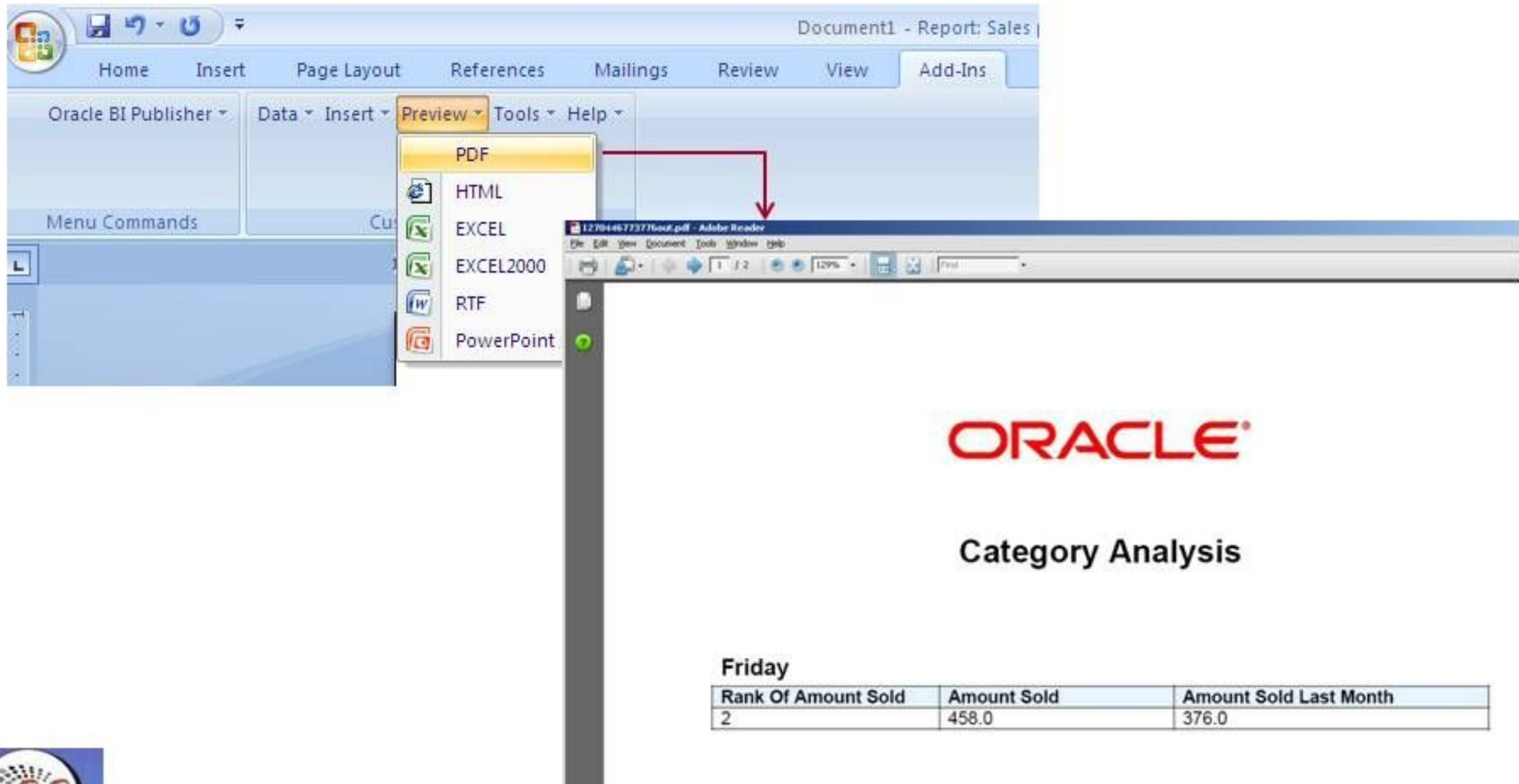
Calendar_ _Day_Name_

Rank Of Amount Sold	Amount Sold	Amount Sold Last Month
<u>_Sales_Facts_ _Rank_Amount_Sold_</u>	<u>_Sales_Facts_ _Amount_Sold_</u> _000_	<u>_Month_Ago_Facts_ _Amount_Sold_MA</u> go_000_ E

end ROW by _Calendar_ _Day_Name_

Preview Template

- Preview the template in PDF, HTML, Excel, PowerPoint or RTF format



The screenshot shows the Oracle BI Publisher interface. The 'Preview' menu is open, displaying options: PDF, HTML, EXCEL, EXCEL2000, RTF, and PowerPoint. A red arrow points from the 'PDF' option to a preview window titled '127046773776out.pdf - Adobe Reader'. The preview window displays the Oracle logo and the title 'Category Analysis'.

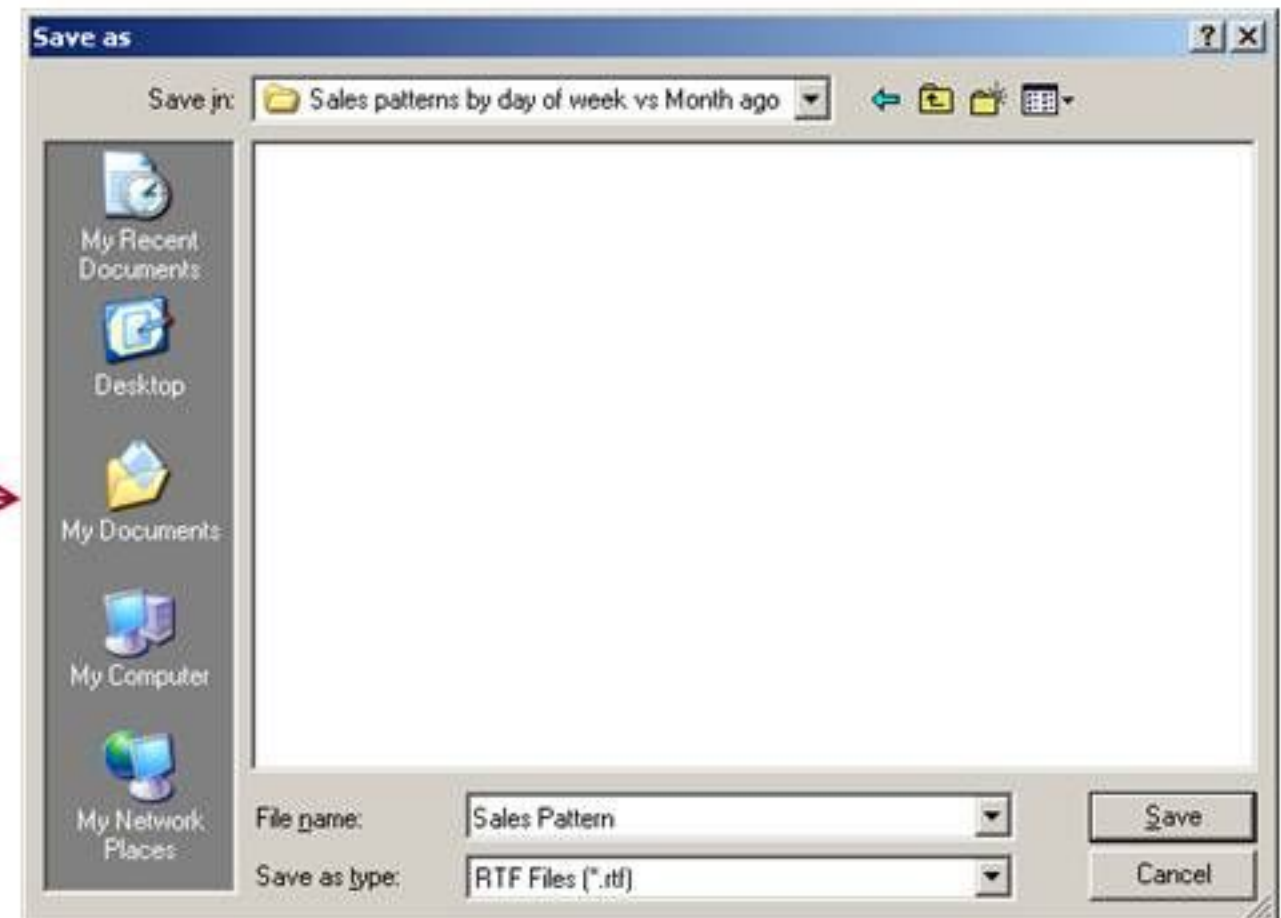
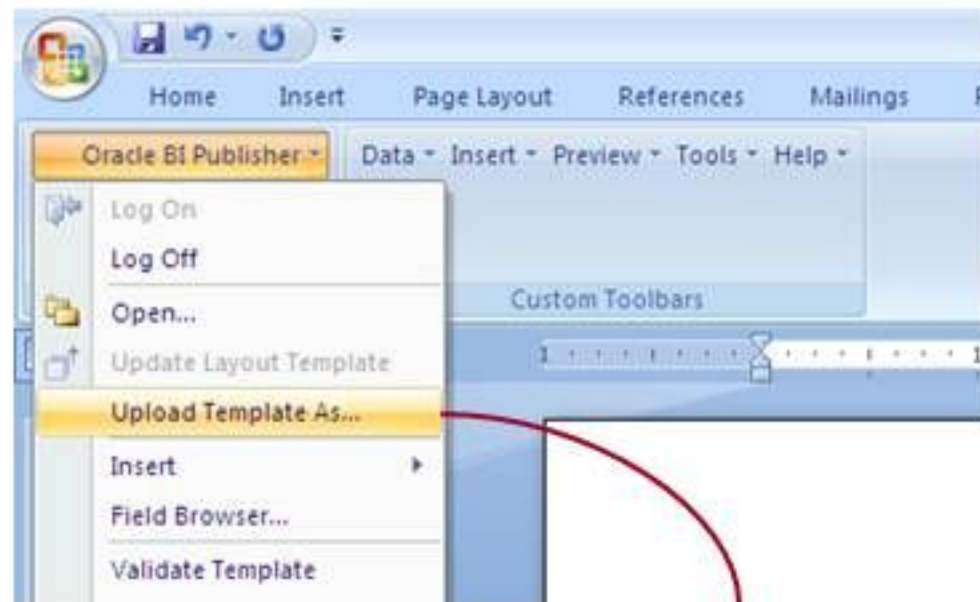
Category Analysis

Friday

Rank Of Amount Sold	Amount Sold	Amount Sold Last Month
2	458.0	376.0

Upload Template

- Upload the template to be available in BI Publisher



Report Template in BI Publisher

- Report template created using Template Builder is available in the BI Publisher

The screenshot shows the Oracle BI Publisher Enterprise web interface. The top navigation bar includes 'Reports', 'Schedules', and 'Admin'. The breadcrumb trail is 'Home > Shared Folders > Oracle BI Answers > Sales patterns by day of week vs Month ago'. The 'Template' dropdown is set to 'Sales Pattern', and the 'Format' dropdown is open, showing a list of available report formats: HTML, PDF, RTF, Excel, Excel2000, PowerPoint, MHTML, CSV, and Data. A blue callout box points to the 'Sales Pattern' template, stating 'Report template created using Template Builder'. Another blue callout box points to the format list, stating 'Available Report formats'. The Oracle logo is visible on the right.

Report template created using Template Builder

Available Report formats

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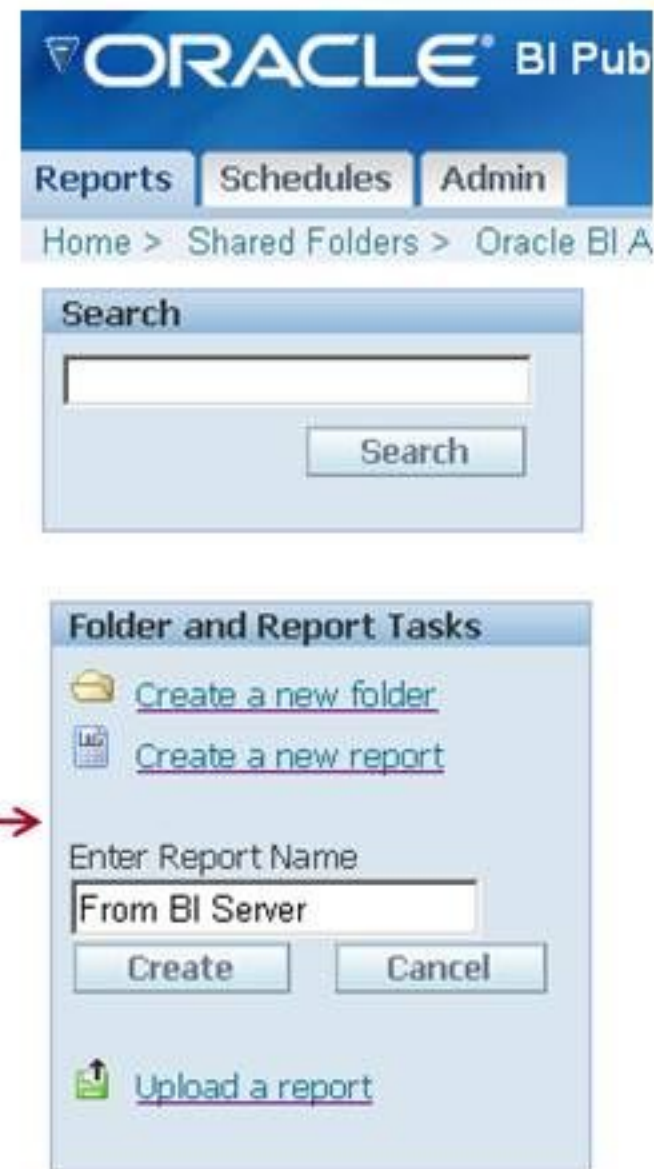
Sales Pattern

Friday

Rank Of Amount Sold	Amount Sold	Amount Sold Last Month
2	458.0	376.0

2. Reports Based on BI Server Subject Area

- Create a report in a preferred folder in the Reports home page



Edit the Report

➤ Edit the BI Publisher report

The screenshot displays the Oracle BI Publisher Enterprise web interface. At the top, the header shows 'ORACLE BI Publisher Enterprise' with tabs for 'Reports', 'Schedules', and 'Admin'. Below the header, a breadcrumb trail reads 'Home > Shared Folders > Oracle BI Answers'. A search box is visible on the left. The main content area lists a report titled 'From BI Server' with a 'Date Modified' of '4/5/10 12:08 PM Calcutta'. Below the report name are links for 'View', 'Schedule', 'History', 'Edit', and 'Configure'. A red arrow points from the 'Edit' link to a second screenshot of the 'Edit Report' page. This second screenshot shows the 'Report Properties' dialog box with the 'General Settings' tab selected. The 'Report Name' is 'From BI Server'. The 'Description' field is empty. The 'Default Data Source' is set to 'Oracle BI EE' with a 'Refresh Data Source List' link. The 'Parameters per line' is set to '3'. Under 'Properties', the checkboxes for 'Run report online' and 'Show Controls' are both checked.

Define the Data Model

➤ Define the Data Model

The screenshot illustrates the configuration of a data model in Oracle BI EE. On the left, the 'Report' pane shows a tree view with 'Data Model' selected. A red arrow points from the 'Data Model' icon to the 'Data Set' configuration window. The 'Data Set' window has the following settings:

- Name:** BI Server
- Type:** SQL Query
- Data Source:** Oracle BI EE (selected)
- Cache Result:** ☐

Callouts provide instructions: 'Select the data source type as SQL Query' points to the 'Type' dropdown, and 'Select the data source as Oracle BIEE' points to the 'Data Source' dropdown. A 'Query Builder' button is visible at the bottom right of the 'Data Set' window.

Query Builder

- Use Query Builder to generate the SQL query for the report

Details

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

☐ Cache Result

SQL Query

Query Builder

Query Builder - Microsoft Internet Explorer

Schema SH Search

Model Conditions SQL Results 10 Cancel Save

Calendar

<input type="checkbox"/> End Of Cal Month	789
<input type="checkbox"/> Calendar Week Number	789
<input type="checkbox"/> Week Ending Day	789
<input type="checkbox"/> Time Id	789
<input checked="" type="checkbox"/> Day Name	A
<input type="checkbox"/> Day Number In Month	789
<input type="checkbox"/> Day Number In Week	789

Sales Facts

<input checked="" type="checkbox"/> Amount Sold	789
<input type="checkbox"/> Amount Sold (000)	789
<input type="checkbox"/> Unit Cost	789
<input type="checkbox"/> Gross Profit	789
<input checked="" type="checkbox"/> Rank Amount Sold	789
<input type="checkbox"/> Rank Amount Sold Within Category	789
<input type="checkbox"/> Share of Category	789

Month Ago Facts

<input checked="" type="checkbox"/> Amount Sold MAgo	789
<input type="checkbox"/> Amount Sold MAgo (000)	789
<input type="checkbox"/> Chg Amount Sold MAgo	789
<input type="checkbox"/> % Chg Amount Sold MAgo	789
<input type="checkbox"/> Chg Rank Amount vs MAgo	789
<input type="checkbox"/> Rank Amount Sold MAgo	789

Calendar

Channels

Customers

Demographics

Fiscal

Measures

Month Ago Facts

Products

Promotions

Sales Facts

Sales Facts Current Month

Times

Click the tables to be included in the SQL query. The tables then appear in the right pane for you to select the columns

Check the check boxes for columns to be included in the query

Query Builder (Contd.)

- Click Save to generate the SQL Query

The screenshot shows the Query Builder interface. At the top, there are 'Cancel' and 'Save' buttons. Below them are two tables: 'Sales Facts' and 'Month Ago Facts'. The 'Sales Facts' table has columns for 'Amount Sold', 'Amount Sold (000)', 'Unit Cost', 'Gross Profit', and 'Rank Amount Sold'. The 'Month Ago Facts' table has columns for 'Amount Sold MAgO', 'Amount Sold MAgO (000)', 'Chg Amount Sold MAgO', '% Chg', and 'Amount Sold MAgO'. A red arrow points from the 'Save' button to the 'Details' section below. The 'Details' section has a 'Data Source' dropdown set to 'Oracle BI EE' and a 'Cache Result' checkbox. The 'SQL Query' section shows the following query:

```
select  "Sales Facts"."Rank Amount Sold" as "Rank Amount Sold",
        "Sales Facts"."Amount Sold" as "Amount Sold",
        Calendar."Day Name" as "Day Name",
        "Month Ago Facts"."Amount Sold MAgO" as "Amount Sold MAgO"
from    SH."Month Ago Facts" "Month Ago Facts",
        SH."Sales Facts" "Sales Facts",
        SH.Calendar Calendar
```

SQL query that will form the data source for the report

Define Report Template

➤ Define the report template

The screenshot illustrates the process of defining a report template. On the left, the 'Report' menu is open, showing options like 'New', 'Data Model', 'BI Server', 'List of Values', 'Parameters', 'Layouts', and 'Bursting'. A red arrow points from the 'New' button to the 'Layout' configuration window on the right.

The 'Layout' window has a 'General Settings' tab. It contains the following fields and options:

- Name:** A text box containing 'Sales Pattern'. A blue callout bubble points to this field with the text 'Define the template name'.
- Template:** A dropdown menu with a 'Refresh' button next to it.
- Template Type:** A dropdown menu set to 'RTF Template'.
- Output Format:** A section with radio buttons and checkboxes:
 - ☐ All Formats
 - ☒ Limit Output Format to
 - ☒ HTML
 - ☒ PDF
 - ☐ RTF
 - ☒ Excel
 - ☐ Excel2000
 - ☐ Powerpoint
 - ☐ MHTML
 - ☐ CSV
 - ☐ Data

A blue callout bubble points to the 'Limit Output Format to' section with the text 'Define the output formats'.

Select Report Template

Upload the report templates created using Template Builder

Browse and upload the templates that were created using Template Builder

Create Layouts

Click the New button in the toolbar to create new layout

Default Template

Default Template

Auto Generate Layout

Create a new RTF template based on the default data model

File Name

Manage Template Files

Template (Click link to download)	
Sales Patterns.rtf	<input type="button" value="Delete"/>

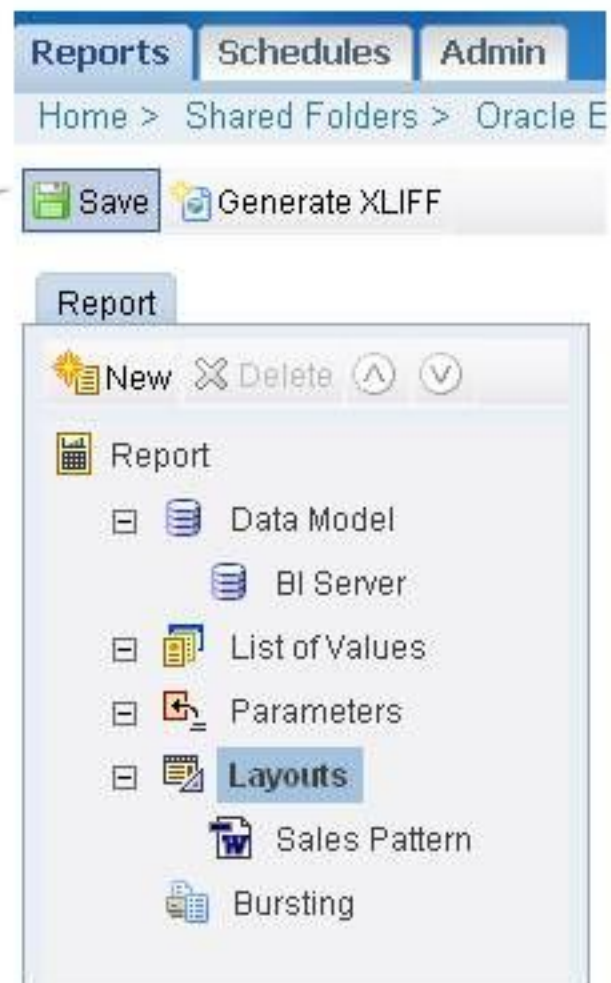
Upload Template:

Duplicate filenames will be overwritten.

Save the Report

➤ Save the Report

Click Save to save the report



View the Report

➤ View the report from the saved location



From BI Server
Date Modified 4/5/10 12:50 PM Calcutta
[View](#) [Schedule](#) [History](#) [Edit](#) [Configure](#)

Reports Schedules Admin

Home > Shared Folders > Oracle BI Answers > From BI Server

Template Sales Pattern PDF View Export Send Schedule Analyzer Analyzer for Excel

HTML PDF Excel

120%

ORACLE®

Sales Pattern

Friday

Rank Of Amount Sold	Amount Sold	Amount Sold Last Month
2	458.0	376.0

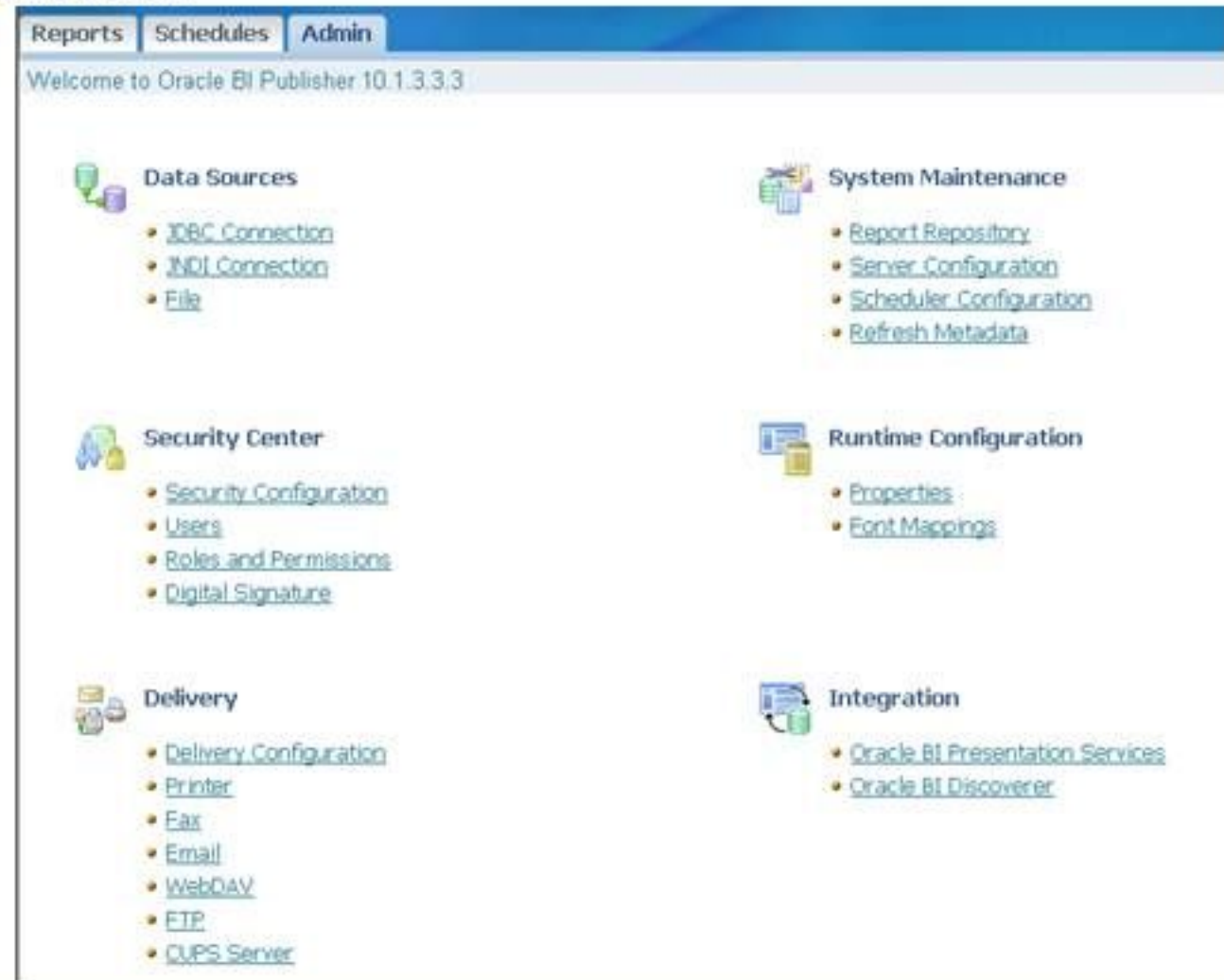
Uploaded report templates are available here

Report can be viewed in HTML, PDF and Excel formats only as defined

BI Publisher Administration

➤ Admin tab in BI Publisher allows users to:

- ◆ Configure the data sources
- ◆ Create users
- ◆ Integrate Oracle BI Presentation Services
- ◆ Define delivery devices
- ◆ Configure the Scheduler



Test Your Understanding

1. **How is an Oracle BI Publisher report different from the report created using Oracle BI Answers?**
2. **Name the different data sources for a BI Publisher report.**
3. **How does an Analyzer for Excel help for a BI Publisher report?**
4. **How are the Report templates created?**
5. **What are the different formats in which a BI Publisher report can be viewed?**

Oracle BI Publisher : Summary

- ❖ **Oracle BI Publisher is a powerful report generation tool used to create highly formatted reports**
- ❖ **BI Publisher reports can be based on an:**
 - ◆ **Oracle BI Answers Request**
 - ◆ **Oracle BI Subject Area**
 - ◆ **Web Services**
 - ◆ **HTTP/RSS Data set**
 - ◆ **File Data Set**
- ❖ **Template Builder is used to create templates for a BI Publisher report**
- ❖ **Analyzer for Excel enables users to:**
 - ◆ **Export the results of the report query to an Excel spreadsheet**
 - ◆ **Create Excel templates and upload them to the BI Publisher server**
 - ◆ **Access and run reports from an Excel session**

Oracle BI Publisher: References

- http://www.oracle.com/technology/obe/obe_bi/bi_ee_1013/index.html
- <http://www.oracle.com/technology/products/bi/index.html>
- **Oracle Business Intelligence Publisher User Guide**

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Oracle BI Publisher

