





















## Practice 15-1: Building a BI Publisher Report Based on an Answers Request





<b>Goals</b>	To create a BI Publisher report based on an Answers request and view its data in BI Publisher
<b>Scenario</b>	You create an Answers request with filters for dashboard prompts and use Oracle BI Publisher for Word to open the request and save it as a BI Publisher request. You then create and upload a template for use with the report and view the results.
<b>Time</b>	30–40 minutes

### Instructions

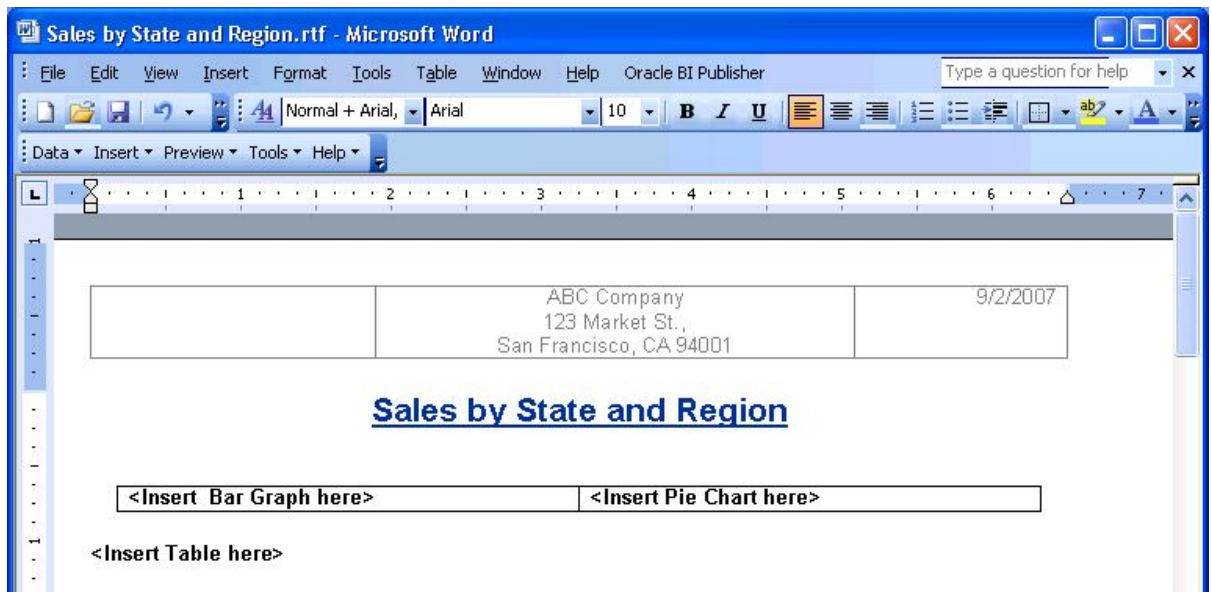
1. If necessary, start Oracle Business Intelligence Presentation Services and log in as Administrator.
2. In Answers, create the following request using the SupplierSales subject area and save it as **Sales by State and Region**:

Customers		Periods	SalesFacts	
Region ↓↑	State ↓↑	Year ↓↑	Dollars ↓↑	Units Ordered ↓↑
   	   	   	   	   

3. Set filters for Is Prompted on both the Region and State columns.

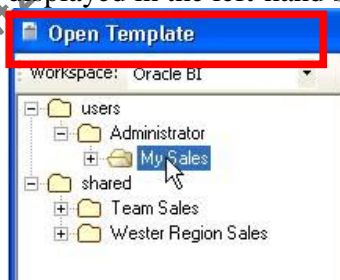
Region is prompted	 
AND State is prompted	 

4. In Word, open the **Sales by State and Region.rtf** file in D:\labs. This is a simple rich text format file with a header, footer, and a title that will serve as the basis for a BI Publisher template for the Answers request you have created. Observe that the Oracle BI Publisher menu and toolbar is displayed in Word, indicating that Oracle BI Publisher Desktop is installed. Explore the options in the toolbar menus.



5. Select Oracle BI Publisher > Log On and log in as **Administrator** with password **Administrator**. If you are prompted for the report server URL, enter the URL in the following format: **http://<Machine\_Name>:9704/xmlpserver**.

6. The Open Template dialog box is displayed. By default, the template selection defaults to the BI Publisher workspace, displaying the BI Publisher folders and their respective reports and template layouts. Select **Oracle BI** from the Workspace drop-down list. Notice that your Presentation Catalog folders are displayed in the left-hand selection pane.

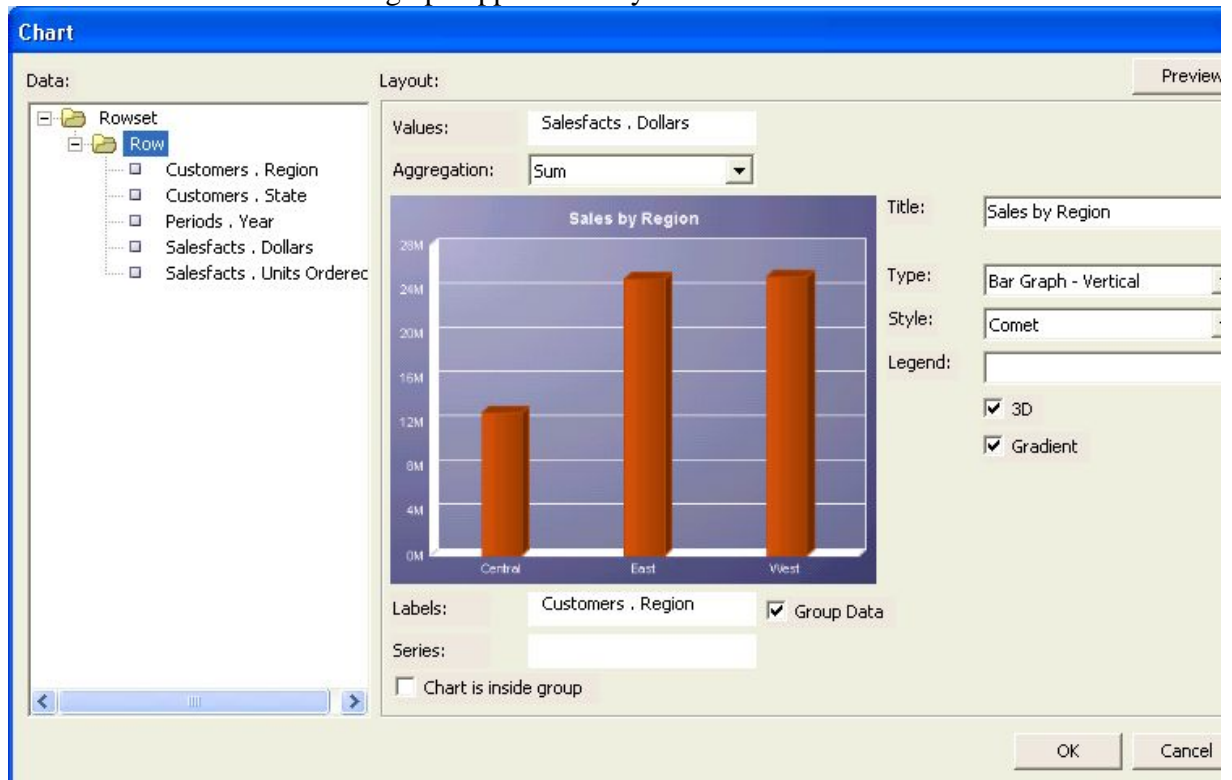


7. Select Users > Administrator > My Sales and, in the Reports list, double-click the **Sales by State and Region** BI Answers request. The Save As Oracle BI Publisher Report dialog box is displayed, allowing you to save the Answers request as a BI Publisher report in the BI Publisher folders.
8. Select **My Folders** and click **Save** to save the report. When you save an Answers request as a BI Publisher Report, the XML data definitions are loaded into the RTF template file so that you can define the layout for the report data.
9. Add a bar chart to the template.
  - a. In the report template in Word, select **<Insert Bar Graph here>**.
  - b. In the BI Publisher toolbar, select Insert > Chart.

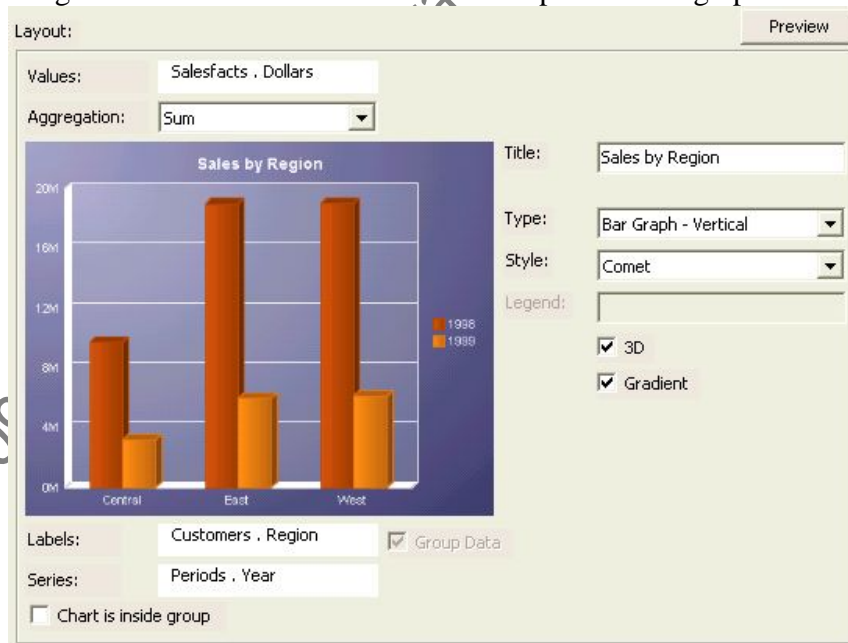


- c. In the Chart dialog box, drag **Salesfacts.Dollars** to the Values field.
- d. Drag **Customers.Region** to the Labels field.
- e. In their respective drop-down lists, select **Bar Graph - Vertical** as the Type, and select **Comet** as the Style.
- f. Enter **Sales by Region** as the Title.

- g. Click **Preview** to see how the graph appears with your selections.



- h. Drag **Periods.Year** to the Series field and preview the graph.

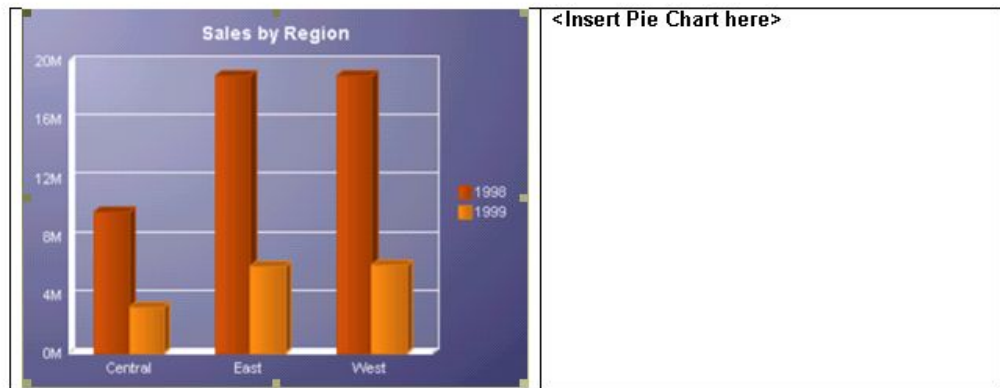


- i. Click **OK**.

- j. In the template, resize the chart so that it fits correctly in the table and verify your work:

	My Company 123 Market St., San Francisco, CA 94001	9/20/2007
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### Sales by State and Region



<Insert Table here>

10. Add a pie chart to the template.
- In the report template in Word, select **<Insert Pie Chart here>**.
  - In the BI Publisher toolbar, select **Insert > Chart**.
  - In the Chart dialog box, drag **Salesfacts.Units Ordered** to the Values field.
  - Drag **Customers.Region** to the Labels field.
  - In their respective drop-down lists, select **Pie Chart** as the Type, and select **Comet** as the Style.
  - Enter **Units by Region** as the Title.

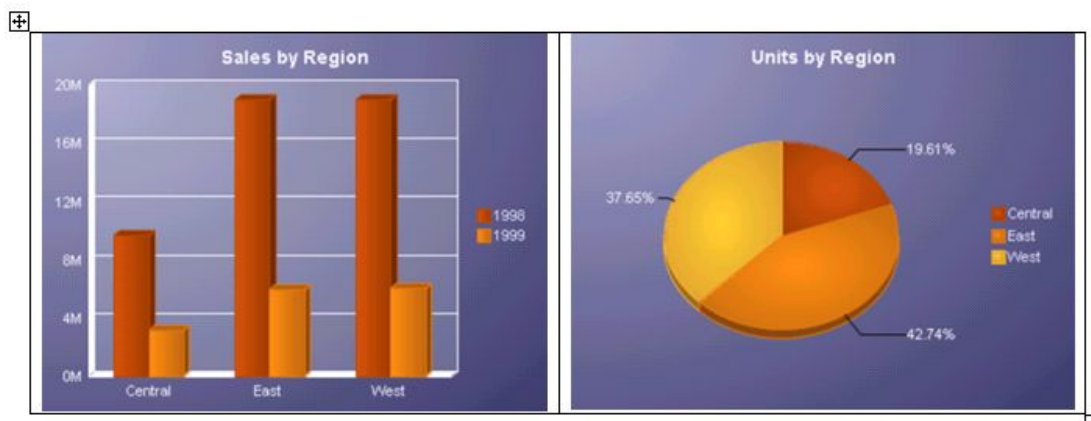
- g. Click **Preview** to see how the pie chart appears with your selections.



- h. Click **OK**.
- i. In the template, resize the chart so that it fits correctly in the table and verify your work:

	My Company 123 Market St., San Francisco, CA 94001	9/20/2007
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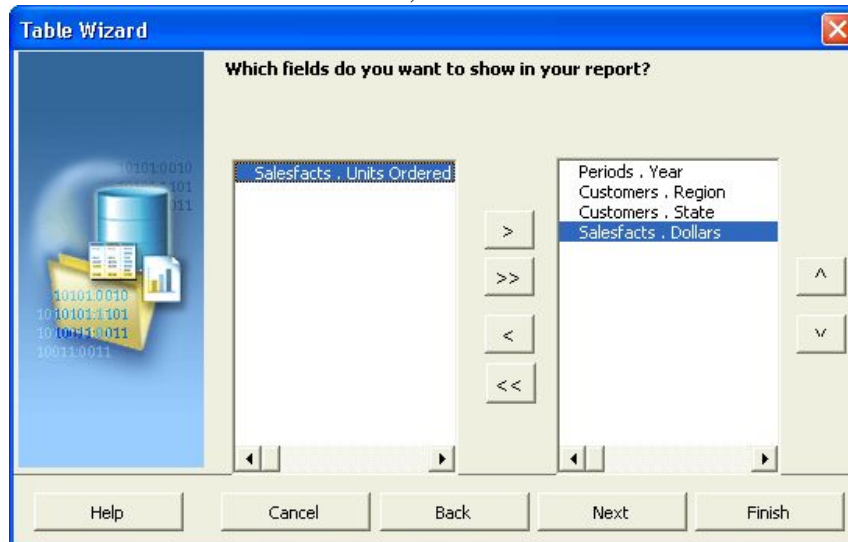
### Sales by State and Region



<Insert Table here>

11. Add a table to the template.
- a. In the report template, select **<Insert Table here>**.

- b. In the BI Publisher toolbar, select Insert > Table Wizard to define a table format for the report data.
- c. Select **Table** and click **Next**.
- d. Click **Next**.
- e. Select **Periods.Year**, **Customers.Region**, **Customers.State**, and **SalesFacts.Dollars** in the left-hand list and add them to the right-hand list of fields to be included in the table, and then click **Next**.



- f. Select **Periods.Year** from the **Group By** drop-down list to group the data by year, and then click **Next**.



- g. Select **Customers.Region** from the **Sort By** drop-down list to sort first by region, and then select **Customers.State** from the **Then By** drop-down list to



set a secondary sort on the state.

The screenshot shows the 'Table Wizard' dialog box, Step 2: 'Which fields would you like to use to sort the data?'. The dialog has a blue header bar with the title 'Table Wizard' and a close button. On the left is a graphic of a database cylinder and folders. The main area contains four rows for sorting. The first row is 'Sort By' with 'Customers . Region' selected in the dropdown, 'Ascending' selected with a radio button, and 'Date/Text' selected with a radio button. The second row is 'Then By' with 'Customers . State' selected in the dropdown, 'Ascending' selected with a radio button, and 'Date/Text' selected with a radio button. The third and fourth rows have empty dropdowns and 'Ascending' and 'Date/Text' radio buttons respectively. At the bottom are buttons for 'Help', 'Cancel', 'Back', 'Next', and 'Finish'.

h. Click **Next**.

i. Edit the labels of the fields **Customers.Region**, **Customers.State**, and **Salesfacts.Dollars** as **Region**, **State**, and **Dollars**.

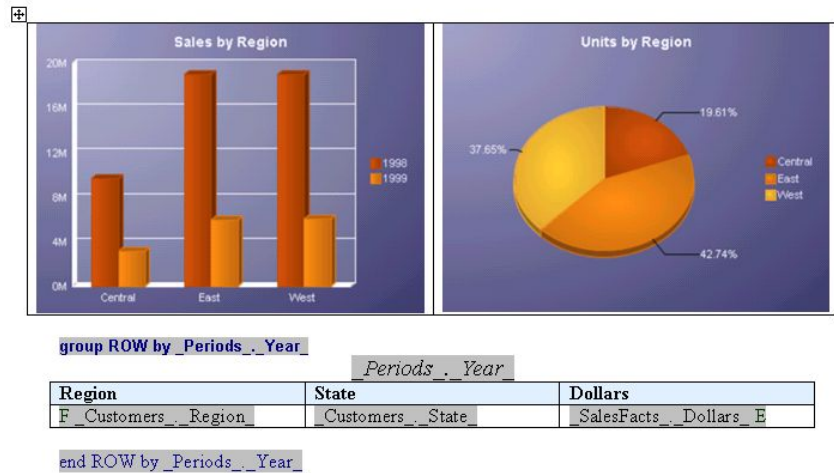
The screenshot shows the 'Table Wizard' dialog box, Step 3: 'How do you want to label the fields?'. The dialog has a blue header bar with the title 'Table Wizard' and a close button. On the left is a graphic of a database cylinder and folders. The main area contains a table with two columns: 'Field' and 'Label'. The table has three rows: 'Customers . Region' with 'Region' in the label field, 'Customers . State' with 'State' in the label field, and 'Salesfacts . Dollars' with 'Dollars' in the label field. At the bottom are buttons for 'Help', 'Cancel', 'Back', 'Next', and 'Finish'.

Field	Label
Customers . Region	Region
Customers . State	State
Salesfacts . Dollars	Dollars

j. Click **Finish** and verify that your table appears in the template as follows. Notice the form fields with the gray background, which reference request data



in the template.



- Save the template. Note that you could also use Word formatting commands to specify the formatting of elements in the table, including cell formatting, justification, and font properties.
- You need to set a format to display the dollars in the correct format. Double-click the **SalesFacts\_ Dollars\_E** form field in the Dollars column.
- In the BI Publisher Properties dialog box, click **Word Properties**.
- In the Text Form Field Options dialog box, select **Number** from the Type drop-down list.
- In the Default number field, enter **99,999,999.99**, and in the Number format drop-down list, select the format with a leading \$ symbol.

Text Form Field Options

Text form field

Type: Number

Default number: \$99,999,999.99

Maximum length: Unlimited

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

Run macro on

Entry:

Exit:

Field settings

Bookmark: Text6

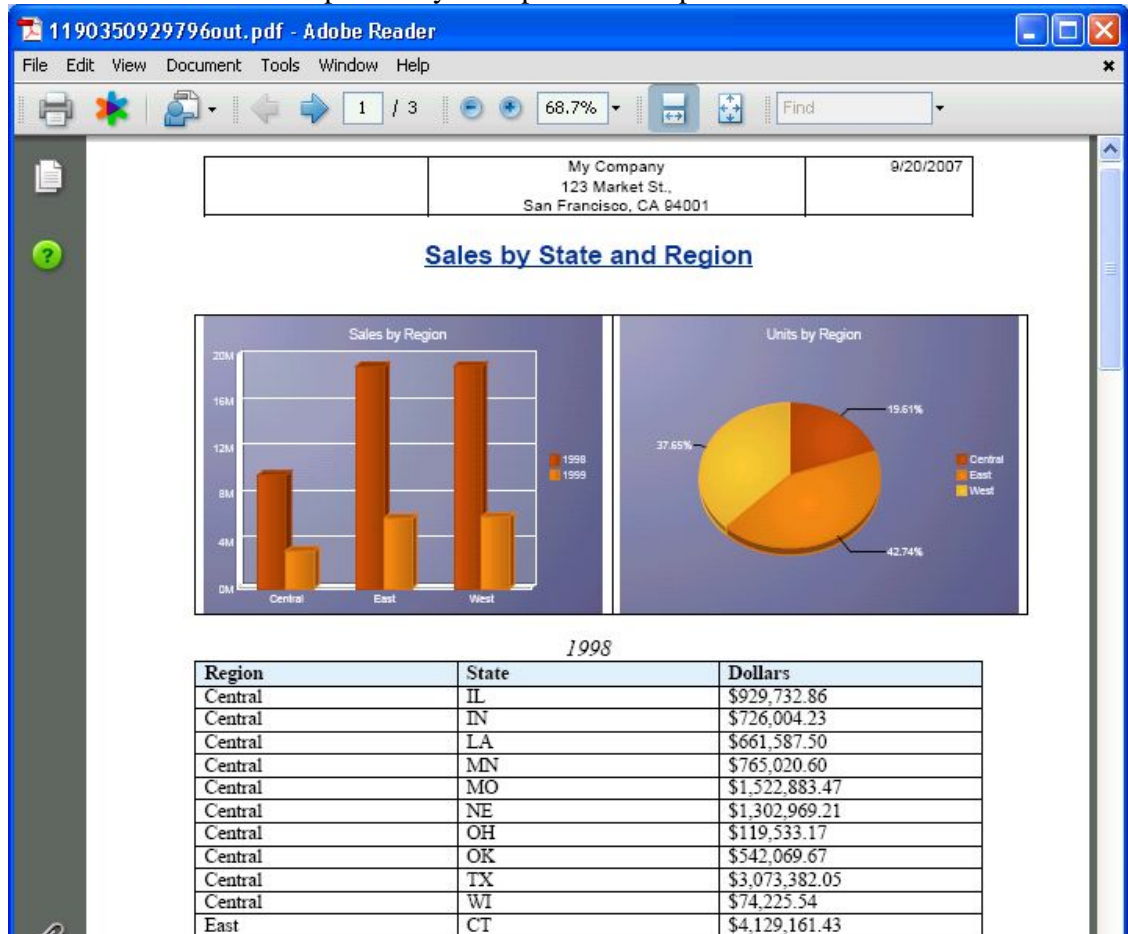
☒ Fill-in enabled

☐ Calculate on exit

Add Help Text... OK Cancel

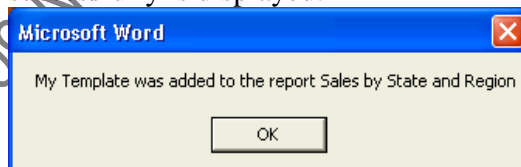
- Click **OK**.

- q. Select Preview > PDF to preview your report and template in Adobe Acrobat.



12. Upload the template.

- Select Oracle BI Publisher > Upload Template As.
- In the Upload as new dialog box, enter **My Template** as the template name.
- Click **OK**.
- Click **OK** when the message indicating that the template was uploaded successfully is displayed.



13. View the BI Publisher report you created from an Answers request with the template you added to it.

- In Answers, select More Products > BI Publisher.
- On the Reports tabbed page of BI Publisher Enterprise, click the **My Folders** link to open the BI Publisher folder.

- c. Click the **View** link below the Sales by State and Region BI Publisher report.



**Sales by State and Region**

This report references a remote Answers Server. The report is located in: /users/administrator/My Sales/Sales by State and Region.

Date

Modified 9/28/07 11:02 AM Mountain Time

**View** Schedule History Edit Configure

- d. Your report should appear in the template as follows:

**ORACLE® BI Publisher Enterprise** Welcome, administrator Dashboards

Reports Schedules Admin

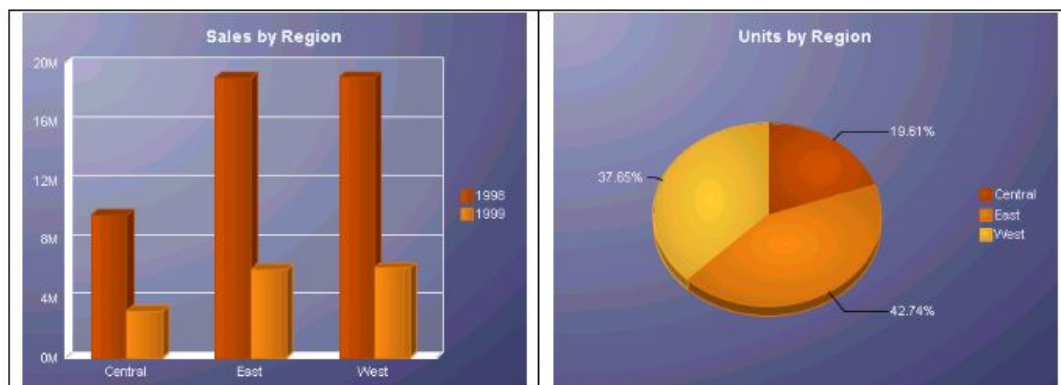
Home > My Folders > Sales by State and Region View

Select a region: All

Template My Template HTML View Export Send Schedule Analyzer

	My Company 123 Market St., San Francisco, CA 94001	9/28/2007
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**Sales by State and Region**

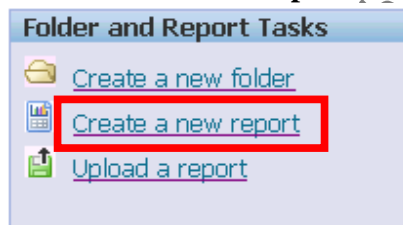


## Practice 15-2: Building a BI Publisher Report Using Oracle Business Intelligence Subject Areas

<b>Goals</b>	To create a BI Publisher report by building a logical query in BI Publisher's Query Builder using a BI Server metadata subject area
<b>Scenario</b>	You create a new report, which uses a BI EE data source, building a logical query based on BI Server metadata using the BI Publisher Query Builder. You then upload an existing template and define a layout for the report so that you can view the results.
<b>Time</b>	15–20 minutes

### Instructions

1. Launch BI Publisher Enterprise and create a new report.
  - a. In Answers, select More Products > BI Publisher.
  - b. Click **My Folders**.
  - c. Click **Create a new report**.



- d. Enter **Units by State and Region** in the Enter Report Name field and click **Create**.
  - e. Click the **Edit** link below the Units by State and Region report.
  - f. In the Edit view, click **Data Model** and click **New** to define the data source for this report. The Data Set page is displayed.
  - g. Select **SQL Query** from the Type drop-down list.

- h. Select **Oracle BI EE** from the Data Source drop-down list.

**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

- i. Click **Query Builder** to create the SQL query. The **Query Builder** displays the SupplierSales subject areas from the BI Server metadata.
- j. Drag the **Customers**, **Periods**, and **Sales Facts** SupplierSales schema objects from the left-hand Schema selection pane onto the Model workspace on the right.

**Query Builder - Microsoft Internet Explorer**

Schema: SupplierSale... Search: [Search]

**Model** Conditions SQL Results 10 Cancel

Table	Column	Selected
Customers	Region	<input type="checkbox"/>
	Sales District	<input type="checkbox"/>
	Sales Rep	<input type="checkbox"/>
	Customer	<input type="checkbox"/>
	Address	<input type="checkbox"/>
	Phone	<input type="checkbox"/>
	City	<input type="checkbox"/>
Periods	Month	<input type="checkbox"/>
	Year	<input type="checkbox"/>
	MonthCode	<input type="checkbox"/>
	Day	<input type="checkbox"/>
	Date	<input type="checkbox"/>
	Month in Year	<input type="checkbox"/>
SalesFacts	Dollars	<input type="checkbox"/>
	Units Shipped	<input type="checkbox"/>
	Units Ordered	<input type="checkbox"/>
	Net Weight Shipped	<input type="checkbox"/>
	Cuts	<input type="checkbox"/>
	CutsP	<input type="checkbox"/>
	CutsW	<input type="checkbox"/>

- k. Select the following columns for the query from objects (select the check boxes for each column):
- Customers.Region
  - Customers.State
  - Periods.Year
  - SalesFacts.Units Shipped

**Model** Conditions SQL Results 10

**Customers**

<input checked="" type="checkbox"/>	Region	A
<input type="checkbox"/>	Sales District	A
<input type="checkbox"/>	Sales Rep	A
<input type="checkbox"/>	Customer	A
<input type="checkbox"/>	Address	A
<input type="checkbox"/>	Phone	A
<input type="checkbox"/>	City	A
<input checked="" type="checkbox"/>	State	A

**Periods**

<input type="checkbox"/>	Month	A
<input checked="" type="checkbox"/>	Year	789
<input type="checkbox"/>	MonthCode	789
<input type="checkbox"/>	Day	789
<input type="checkbox"/>	Date	
<input type="checkbox"/>	Month in Year	789

**SalesFacts**

<input type="checkbox"/>	Dollars	789
<input checked="" type="checkbox"/>	Units Shipped	789
<input type="checkbox"/>	Units Ordered	789
<input type="checkbox"/>	Net Weight Shipped	789
<input type="checkbox"/>	Cuts	789
<input type="checkbox"/>	CutsP	789
<input type="checkbox"/>	CutsW	789

- l. Click the **Conditions** link and explore the grouping, sorting, and alias options you can use. Accept the defaults.
- m. Click the **Results** link to run the query and view the results.

**Model** Conditions SQL Results 10

Region	State	Year	Units Shipped
West	CA	1998	509371
Central	IN	1998	28454
Central	NE	1998	67892
Central	LA	1998	24251
West	ID	1999	4976
East	DC	1998	77200
Central	TX	1998	125094
East	VA	1998	238
West	NM	1999	24436
East	GA	1999	2281

- n. Click **Save**.
- o. In the Data Set page, note that the logical SQL query is displayed. This query uses the logical names for the metadata objects and is interpreted by the BI



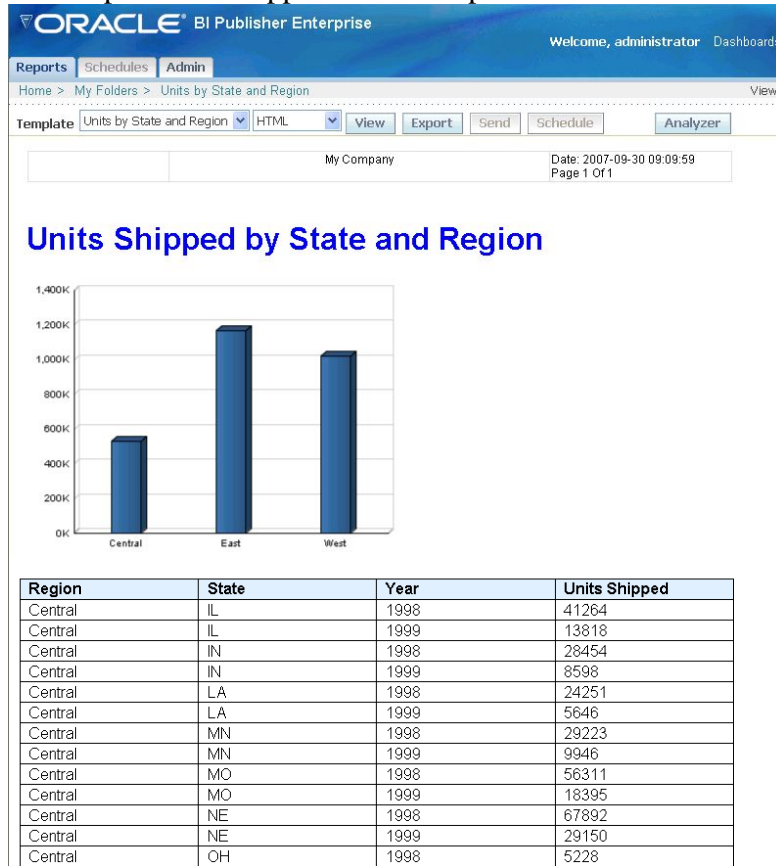
Server, which provides the result set.

- p. Click **Save** to save the report's data set.
2. Create a layout and upload a template for the report.
  - a. Click **Layouts** and click **New** to define a layout for the report.
  - b. On the Layout page, enter **Units by Region and State** in the Name field.
  - c. Click **Layouts** and, in the Manage Template Files area of the Create Layouts page, click **Browse**.
  - d. In the Choose File dialog box, select the **Units by State and Region.rtf** file from D:\labs. This is a rich text format template that has been prepared for the BI Publisher report you have created.
  - e. Click **Upload** to upload the template file.

- f. Select the Units by Region and State layout you created and verify that the Units by State and Region.rtf file appears in the Template drop-down list.
- g. Click **Save**.



- h. Click the **View** link to view the report in the template.
- i. Your report should appear in the template as follows:




## Practice 15-3: Publishing BI Publisher Reports in Interactive Dashboards

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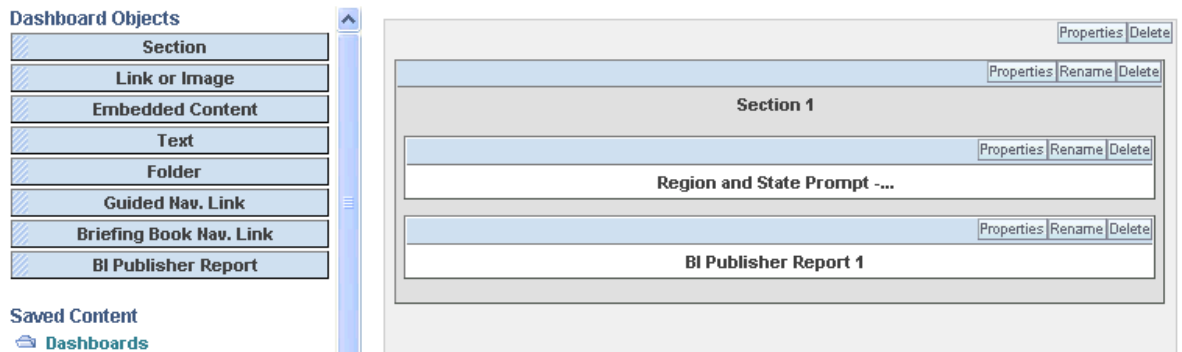
<b>Goals</b>	To add a BI Publisher report to a new Interactive Dashboard page
<b>Scenario</b>	You create a new dashboard page and then use the Dashboard Editor to add a dashboard prompt and a BI Publisher report to the page.
<b>Time</b>	10–15 minutes

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### Instructions

1. Create a dashboard prompt for the region and state to filter the BI Publisher report results on the dashboard.
  - a. In Answers, open **Region and State Prompt**.
  - b. In the Set Variable column, select **None** from the drop-down list.
  - c. Save the prompt in the My Sales folder as **Region and State Prompt - No Variable**.
2. Click the **Dashboards** link.
3. Select Page Options > Edit Dashboard to open the Dashboard Editor.
4. Create a new Interactive Dashboard page.
  - a. Click the **Add Dashboard Page** button . The Add Dashboard Page dialog box is displayed.
  - b. Enter **BI Publisher Page** in the Page Name field.
  - c. Click **OK**.
5. Add the dashboard prompt to the section.
  - a. Expand the **My Sales** folder.
  - b. Drag the **Region and State Prompt - No Variable** prompt onto the default column.

- c. Drag the **BI Publisher Report** object onto the section below the prompt.



- d. Click the **Properties** button in the BI Publisher Report 1 object.  
 e. In the Folder Properties dialog box, click the **Browse** button.  
 f. In the BI Publisher Report Properties dialog box, click **Browse**.  
 g. In the Pick BI Publisher Report dialog box, navigate to the My Folders BI Publisher folder, select the **Sales by State and Region** report, and click **OK**.  
 h. Click **OK** to close the BI Publisher Report Properties dialog box.  
 i. Click the **Save** button in the upper-right corner. Your dashboard page should appear as follows:



- j. Select **Central** and **TX** in the respective drop-down lists in the dashboard prompt and click **Go**. Your dashboard page should appear as follows:

