

Getting Started with Oracle BI Publisher 11g

This tutorial contains the following sections:

[Purpose](#)

[Time to Complete](#)

[Overview](#)

[Prerequisites](#)

[Getting Started with BI Publisher](#)

[Logging in to Oracle BI Publisher and Navigating the Home Page](#)

[Browsing the Catalog and Viewing the Reports](#)

[Setting Preferences](#)

[Configuring the Data Sources](#)

[Types of Supported Data Sources](#)

[Defining a JDBC Connection](#)

[Configuring File Data Location](#)

[Defining a JNDI \(Java Naming and Directory Interface\) Connection](#)

[Creating a Data Model](#)

[Defining Default Data Source, and Output Options](#)

[Creating a SQL Query Data Set](#)

[Viewing the XML Output and Saving the Sample Data](#)

[Creating a Report](#)

[Building a Layout Using Layout Editor](#)

[Launching the Layout Editor and Adding a Grid Layout](#)

[Working with Charts](#)

[Adding a Data Table to the Layout](#)

[Formatting the Data, and Working with the Page Layout Features](#)

[Scheduling a Report](#)

[Confirming that the Scheduler is Configured](#)

[Defining Delivery Destinations](#)

[Creating Scheduled Report Jobs](#)

[Managing Job History and Jobs](#)

[Summary](#)

[Resources](#)

Purpose

This tutorial covers how to get started with Oracle BI Publisher 11g to create simple reports based on Oracle Database. Also, it teaches you how to create report layouts using the Layout Editor online, and how to schedule reports.

Time to Complete

Approximately 1 hour.

Overview

Oracle BI Publisher is a strategic enterprise reporting product from Oracle that provides the ability to create and manage highly formatted reports from a wide range of data sources. Oracle BI Publisher is available as part of the Oracle BI Enterprise Edition Suite and also as a stand alone reporting tool. 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 different types of data sources such as Oracle Database, Files, BI EE, Web services, and Discoverer.

Release 11g of Oracle BI Publisher has enhanced, easy-to-use user interface (UI), many enhanced features, and newly introduced salient features such as - *Data Model Editor* - a graphical user interface for building data models within the BI Publisher interface; and *Layout Editor* - a design tool that enables you to create report layouts within the BI Publisher interface.

In this tutorial you will be guided to create simple reports in BI Publisher based on Oracle Database. You will also be guided to work with the Layout Editor to create the layouts for the reports.

Prerequisites

Before starting this tutorial, you should:

1. Have access to Oracle BI Publisher 11g or installed BI Publisher 11g as stand alone or as part of Oracle BI Enterprise Edition 11g.

Also, it is recommended to use the following versions of browsers - Internet Explorer 7.0 (or above), Mozilla Firefox 3.6.3 (or above).

2. Have access to an Oracle Database 11g (or 10g) with the sample schemas HR and OE installed and unlocked.

The exercises in this tutorial use the HR and OE schemas included in the Oracle Database.

3. Have executed the Repository Creation Utility (RCU) scripts in Oracle Database 11g. This should be done before installing Oracle BI EE. RCU creates the BI Publisher scheduler repository.

Note: BI Enterprise Edition (BI EE) installer comes with these out of the box RCU scripts, that create the necessary schemas and the repositories in the Database for various components of BI EE including BI Publisher. You need an Oracle 11g Database to run these RCU scripts.

However, you can establish a JDBC connection and create data models and reports through BI publisher using both 10g and 11g Databases.

Getting Started with BI Publisher

This topic guides you to login to BI Publisher and get started. It has the following subtopics:

- Logging in to BI Publisher and Navigating the Home Page
- Browsing the catalog and Viewing reports
- Setting Preferences

[Logging in to Oracle BI Publisher and Navigating the Home Page](#)

[Browsing the Catalog and Viewing the Reports](#)

[Setting Preferences](#)

[Configuring the Data Sources](#)

[Types of Supported Data Sources](#)

[Defining a JDBC Connection](#)

[Configuring File Data Location](#)

[Defining a JNDI \(Java Naming and Directory Interface\) Connection](#)

Logging in to Oracle BI Publisher and Navigating the Home Page

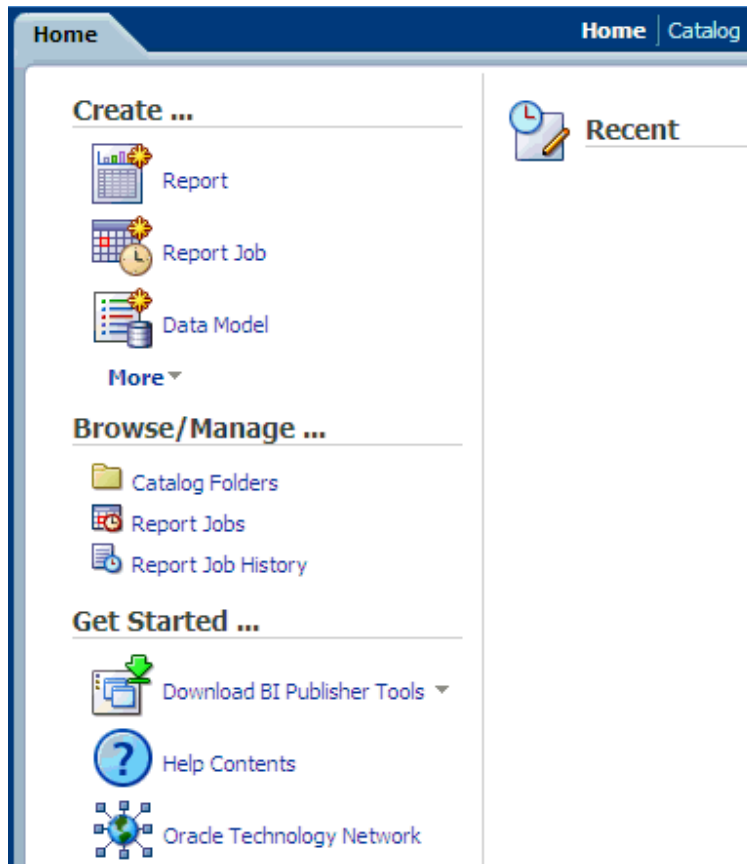
1. Enter the URL for BI Publisher in the browser window, which is of the format- `http://<hostname>: <port >/xmlpserver/`. For example- `http://localhost:9704/xmlpserver/`

This opens the Oracle BI Publisher Enterprise login page-



2. Login as a user with BI Administrator privileges.

When you login to BI publisher, the **Home** page is displayed-



3. The Home page is a task-oriented, centralized workspace combined with a global header, allowing access to Oracle BI Publisher objects, their respective editors, and help documentation.

Observe the various sections of the Home page (greatly enhanced in 11g release to enable the users get started quickly with BI Publisher).

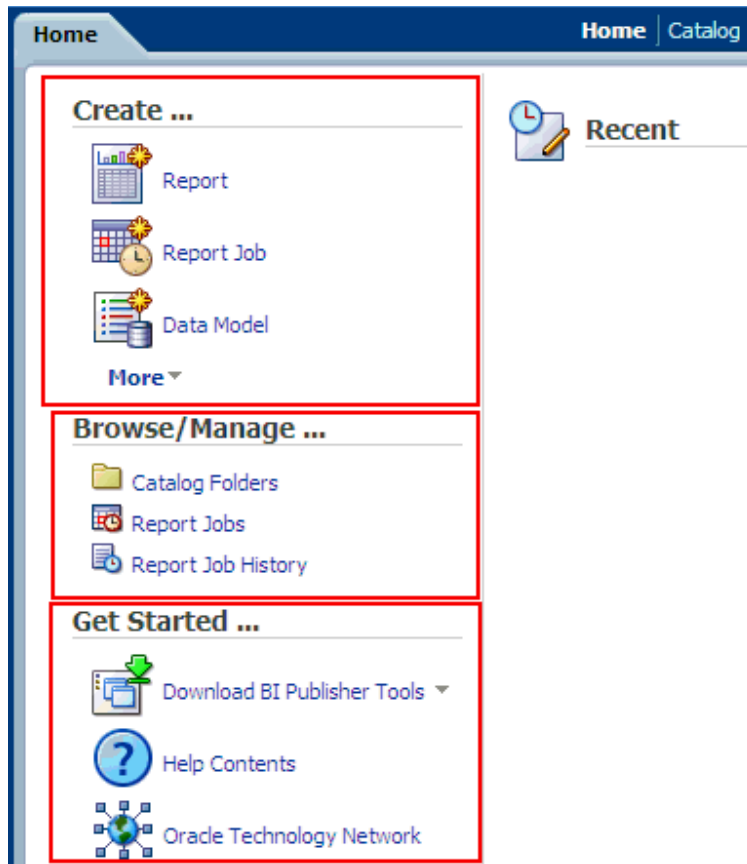
For example you can see -

A Create section on the left that has options to help you create reports, data models, and other objects.

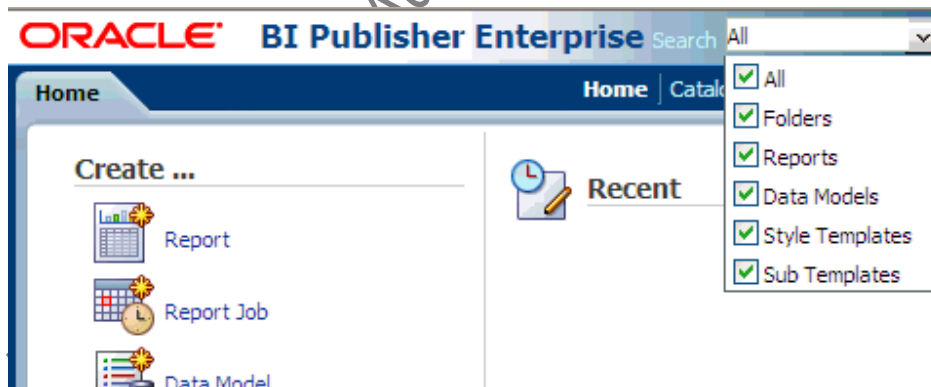
A Browse/Manage section on the left to help you browse and manage the catalog, jobs, and job history.

A Get Started section on the left to help you get started with BI Publisher, with links to various BI Publisher tools, Online Help, and Oracle Technology Network.

A Recent section on the right, personalized to each user so that the users can open/view the reports that have been accessed recently (when you login initially, you may not see any objects listed in the Recent section).



Also, try the enhanced Search capability that enables you to search for objects by type.



4. On the upper right side you can see the links for the **Home** page, **Catalog**, drop-down lists **New**, and **Open**.



Note: All these features make the navigation within BI Publisher easy for report developers and users.

Browsing the Catalog and Viewing the Reports

- 1 . Follow the steps listed here to browse the catalog and open a sample report (predefined).

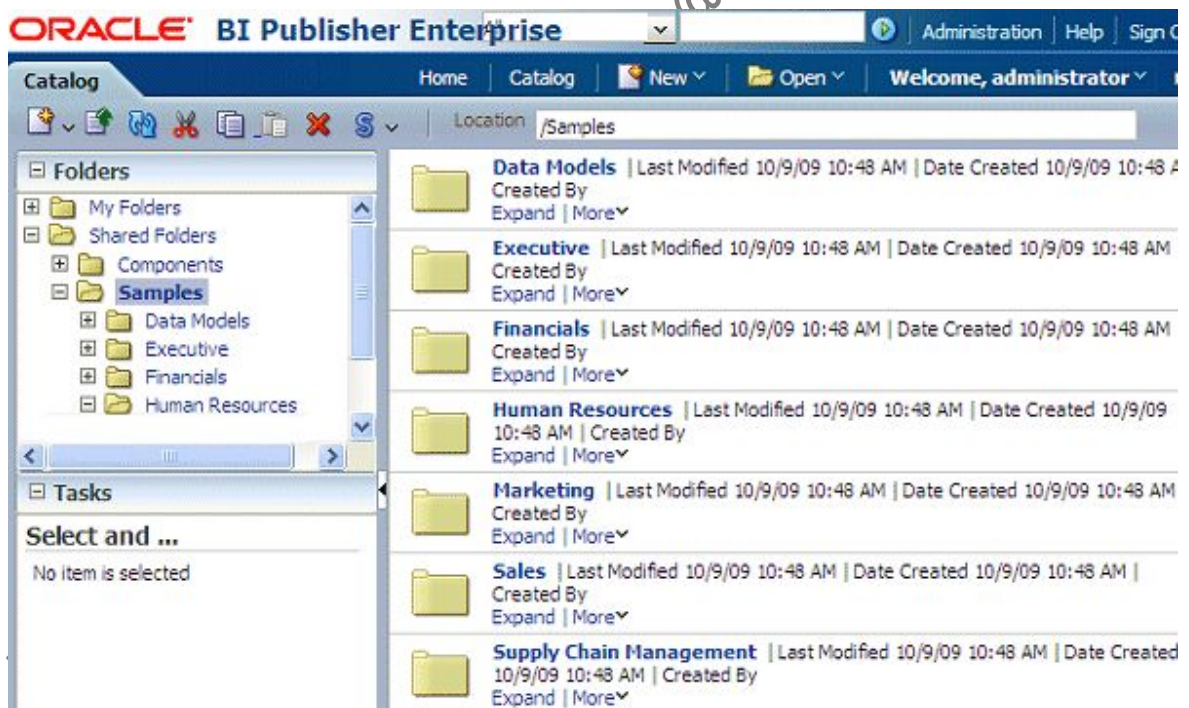
Click the Catalog link in the Browse/ Manage section (or Click the Catalog link found on the right side of the Home page).

Browse/Manage ...



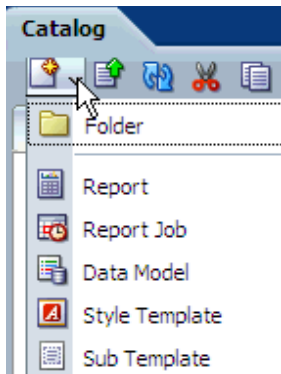
- 2 . The Catalog page is displayed as a tree structure on the left side of the page with the details on the right.

See that the objects such as reports, data models are organized into folders.



Note: The Samples folder found in Shared Folders contains a set of predefined sample reports. You will open one of these reports.

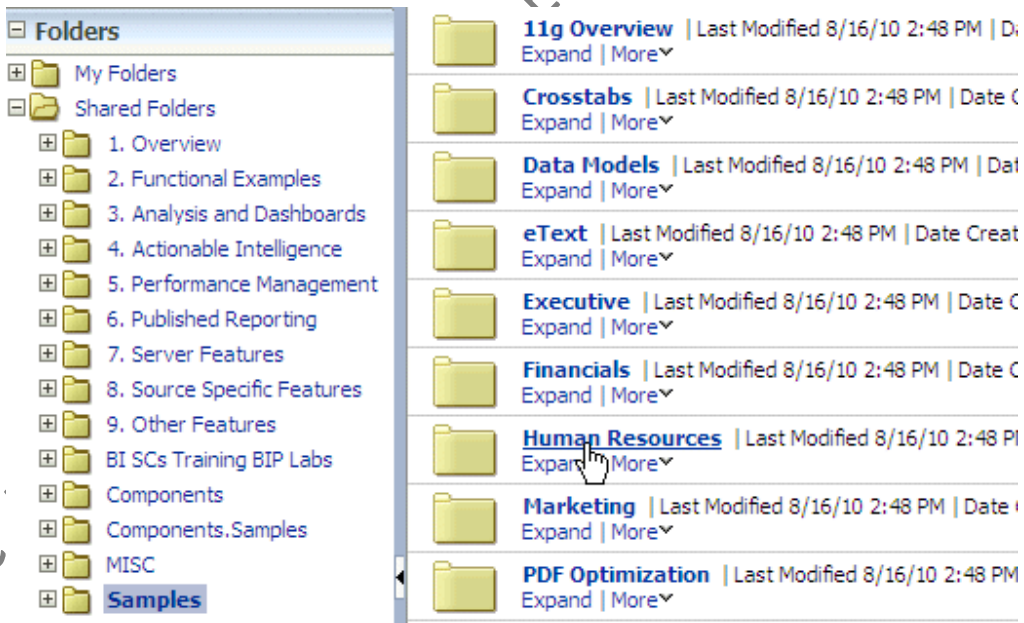
- 3 . Also see the tool bar with New drop-down menu that enables you to create new reports, scheduled jobs, data models and so on.



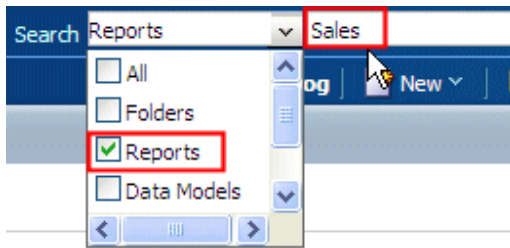
Note that the tool bar also has other options such as copy, cut, paste, and other options that can be used when creating or managing the catalog objects such as data models, and reports.



- 4 . Navigate to the Human Resources folder in Samples. (This displays all the objects in the Human Resources folder.)



You can also search for a report (or other objects) using some key word and view it. For example, in the Catalog page, select the **Reports** check box from the **Search** drop-down list, and enter a key word in the Text field beside it. In the example below, the search results in a list of reports that have "Sales" in name.



- 5 . Click Open link below the **Salary Report**.



- 6 . The Salary Report is opened in view mode. The report data is displayed using the Default layout. All the predefined layouts for the report are displayed as different tabs.

ORACLE BI Publisher Enterprise Search All

Salary Report Home Catalog New Open Signed In As weblogi

Department All Employee All Apply

Financial Style Pivot Table **Default**

Salary Report

Name	Job Title	Manager	Department	Salary
Matthew Weiss	Stock Manager	Steven King	Shipping	8,000.00
Adam Fripp	Stock Manager	Steven King	Shipping	8,200.00
Payam Kaufling	Stock Manager	Steven King	Shipping	7,900.00
Shanta Vollman	Stock Manager	Steven King	Shipping	6,500.00
Kevin Mourgous	Stock Manager	Steven King	Shipping	5,800.00
Gerald Cambrault	Sales Manager	Steven King	Sales	11,000.00
Eleni Zlotkey	Sales Manager	Steven King	Sales	10,500.00
John Russell	Sales Manager	Steven King	Sales	14,000.00
Karen Partners	Sales Manager	Steven King	Sales	13,500.00
Alberto Errazuriz	Sales Manager	Steven King	Sales	12,000.00
Den Raphaely	Purchasing Manager	Steven King	Purchasing	11,000.00
Michael Hartstein	Marketing Manager	Steven King	Marketing	13,000.00

You can also view the report using any of the supported formats. Click View icon displayed on the top of the report viewer towards the right. (Highlighted in the screen below).

Salary Report

Department: Sales Employee: All Apply

Financial Style: Pivot Table Default

Salary Report

Name	Job Title	Manager	Department
John Russell	Sales Manager	Steven King	Sales
Karen Partners	Sales Manager	Steven King	Sales
Alberto Errazuriz	Sales Manager	Steven King	Sales
Gerald Cambrault	Sales Manager	Steven King	Sales

- 7 . Also, note the parameters defined in the report -Department and Employee, that display drop down lists for department names and the employees working in the corresponding departments.

For example, when you select Finance as the Department, and the Employee list shows the employees working in Finance department.

ORACLE BI Publisher Enterprise Search All

Salary Report Home Catalog New Open Signed In As weblogi

Department All Employee All Apply

Financial Style Pivot Table **Default**

Salary Report

Name	Job Title	Manager	Department	Salary
Matthew Weiss	Stock Manager	Steven King	Shipping	8,000.00
Adam Fripp	Stock Manager	Steven King	Shipping	8,200.00
Payam Kaufling	Stock Manager	Steven King	Shipping	7,900.00
Shanta Vollman	Stock Manager	Steven King	Shipping	6,500.00
Kevin Mourgous	Stock Manager	Steven King	Shipping	5,800.00
Gerald Cambrault	Sales Manager	Steven King	Sales	11,000.00
Eleni Zlotkey	Sales Manager	Steven King	Sales	10,500.00
John Russell	Sales Manager	Steven King	Sales	14,000.00
Karen Partners	Sales Manager	Steven King	Sales	13,500.00
Alberto Errazuriz	Sales Manager	Steven King	Sales	12,000.00
Den Raphaely	Purchasing Manager	Steven King	Purchasing	11,000.00
Michael Hartstein	Marketing Manager	Steven King	Marketing	13,000.00

8 . You can click **Financial Style** and **Pivot Table** tabs to view the data in report using these predefined layouts.

The following screens shows data for the Finance department using Financial Style layout:

Salary Report

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

Department: Finance Employee: All Apply

Financial Style Pivot Table Default

1 / 1 75% Find

Brought Forward: .00

Employee Salary Report

Name	Job Title	Manager	Department Name	Salary
Nancy Greenberg	Finance Manager	Neena Kochhar	Finance	12,000.00
Daniel Faviot	Accountant	Nancy Greenberg	Finance	9,000.00
John Chen	Accountant	Nancy Greenberg	Finance	8,200.00
Ismael Sclarra	Accountant	Nancy Greenberg	Finance	7,700.00
Jose Manuel Uman	Accountant	Nancy Greenberg	Finance	7,800.00
Luis Popp	Accountant	Nancy Greenberg	Finance	6,900.00
TOTAL				51,600.00

11.00 x 8.50 in

The following screen displays data for the Sales department using Pivot Table layout.

Salary Report Home | Catalog | New | Open

Department: Sales Employee: All Apply

Financial Style | **Pivot Table** | Default

Average Salary by Title / Department

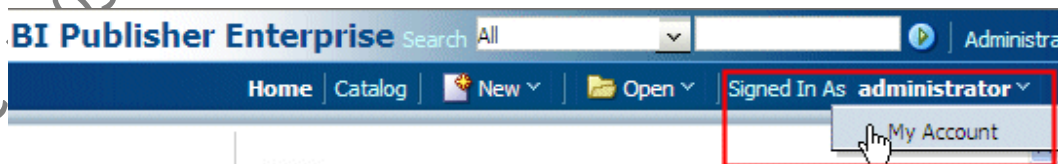
	Sales Manager	Sales Representative	Average
Sales	12,200.00	8,396.55	8,955.88
Average	12,200.00	8,396.55	8,955.88

Total Salary by Title / Department

	Sales Manager	Sales Representative	Average
Sales	61,000.00	243,500.00	304,500.00

Setting Preferences

- 1 . To set the Preferences , Click on the link Signed in as <user>, and select **My Account** from the drop-down list.



- 2 . This displays the **Preferences** screen with the General, My Group tabs/ links as shown in the screen below:

The screenshot shows the 'My Account' dialog box with the 'General' tab selected. The 'User ID' and 'Display Name' are both set to 'administrator'. The 'Report Locale' is set to 'English (United States)', 'UI Language' is 'English (United States)', and 'Time Zone' is '[GMT-08:00] Pacific Time (US & Canada)'. The 'Accessibility Mode' is set to 'Off' (radio button selected). The dialog has 'Help', 'OK', and 'Cancel' buttons at the bottom.

You can set the **Report Locale**, **UI Language**, **Time Zone**, and **Accessibility Mode** in the **General Preferences** section.

Report Locale- A locale is a language and territory combination (for example, English (United States) or French (Canada)). BI Publisher uses the report locale selection to determine the template translation to apply, the number formatting and date formatting to apply to the report data.

UI Language- The UI language is the language that your user interface displays in. The language that you selected at login will be selected as the default. However, you can choose from the languages that are available for your installation through this option.

Time Zone - Select the time zone to apply to your reports. Reports run by you (this user) will display the time according to the time zone preference selected here.

Accessibility Mode- Setting this to "On" will display the report catalog in a tree structure that is accessible via keyboard strokes

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

- 3 . Click the **My Groups** tab to view a list of the application roles to which you are assigned. You cannot modify this list.

The screenshot shows the 'My Account' dialog box with the 'My Groups' tab selected. The 'User ID' and 'Display Name' are both set to 'weblogic'. The 'My Groups' list contains the following roles: 'authenticated-role', 'BIAdministrator', 'BIAuthor', and 'BIConsumer'. The dialog has 'Help' and 'OK' buttons at the bottom.

To change your password, click the **Password** tab of the My Account dialog.

Note: Password tab is visible only when you use BI Publisher Security.

Configuring the Data Sources

Types of Supported Data Sources

Oracle BI Publisher supports various types of Data Sources such as JDBC data sources (Oracle Database, and other Databases), XML Files, BI EE Reports (Answers), JNDI data sources, OLAP data sources, Fusion Application Data sources, Web Services, HTTP data sources, and Discoverer.

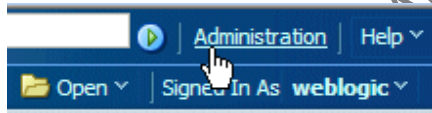
Before you create a data model based on these data sources, you need to configure a connection to these data sources first. In this topic, you will learn how to configure a JDBC connection to an Oracle Database, and also you learn how to define a File data source.

This topic has the following subtopics-

- Defining a JDBC Connection
- Configuring File Data Location
- Defining a JNDI Connection

Defining a JDBC Connection

1. To define a JDBC connection click the **Administration** link found on the right side of the BI Publisher page.



This displays the BI Publisher Administration page as shown below (Observe the Data Sources section in the screen below):

Administration Home Catalog New Open

**Data Sources**

- JDBC Connection
- JNDI Connection
- File
- LDAP Connection
- OLAP Connection

**System Maintenance**

- Server Configuration
- Scheduler Configuration
- Scheduler Diagnostics

**Security Center**

- Security Configuration
- Roles and Permissions
- Digital Signature

**Runtime Configuration**

- Properties
- Font Mappings
- Currency Formats

**Delivery**

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

**Integration**

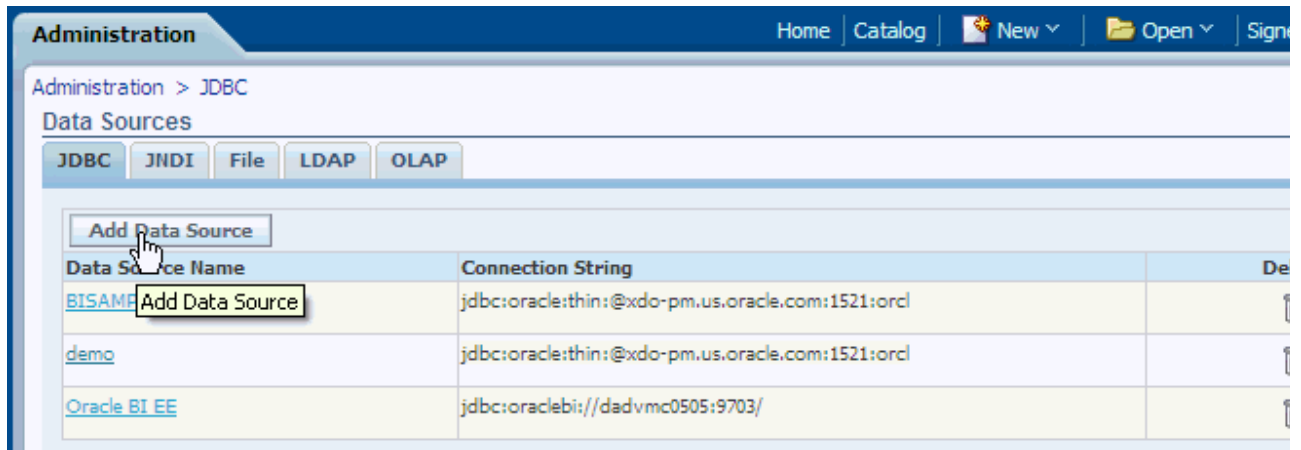
- Oracle BI Presentation Services
- Oracle BI Discoverer

2. Click the **JDBC Connection** link found under the **Data Sources** section in the **Administration** page.

**Data Sources**

- JDBC Connection
- JNDI Connection
- File
- LDAP Connection
- OLAP Connection

3. This displays the **Data Sources** page. In the JDBC section, click **Add Data Source** to create a JDBC connection to your database.



4. In the Add Data Source page that is displayed, enter the details as given below -

Data Source Name - OE

Driver Type - Select a driver type to suit your Database (for example, you can select Oracle 10g or Oracle 11g to suit your Database).

Database Driver Class - oracle.jdbc.driver.OracleDriver (Define a driver class to suit your Database)

Connection String - Provide the database connection details. For example hostname:port:sid.

User name - OE (Database user name)

Password - OE (Database user password)

Do not click **Apply** or **Cancel** after defining the above details. Click **Test Connection**.

The 'Add Data Source' form contains the following fields and values:

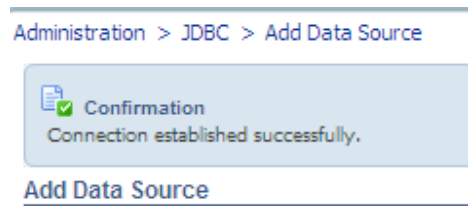
- Data Source Name**: OE
- Driver Type**: Oracle 11g
- Database Driver Class**: oracle.jdbc.OracleDriver
- Connection String**: jdbc:oracle:thin:@myhost:1521:orcl
- Username**: oe
- Password**: (masked with dots)
- Use Proxy Authentication**: ☐
- Test Connection**: Button highlighted with a mouse cursor

Note: To continue with this tutorial exercises, the sample schemas OE, and HR should be installed in your Oracle Database mentioned in the Prerequisites. Else, you will not be able to define this JDBC connection.

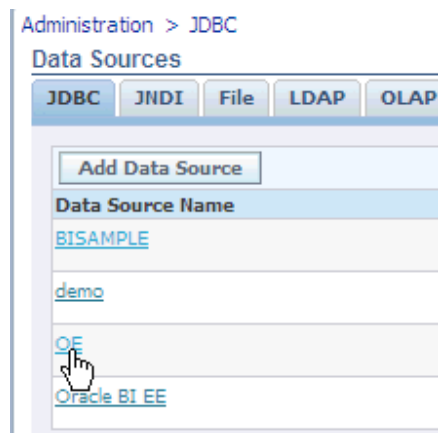
5 If the connection to the database is established, a confirmation message is displayed indicating the success.

(As shown in the screen below).

Then click **Apply**.



6 You can see this newly defined connection (OE) in the list of JDBC Data Sources.



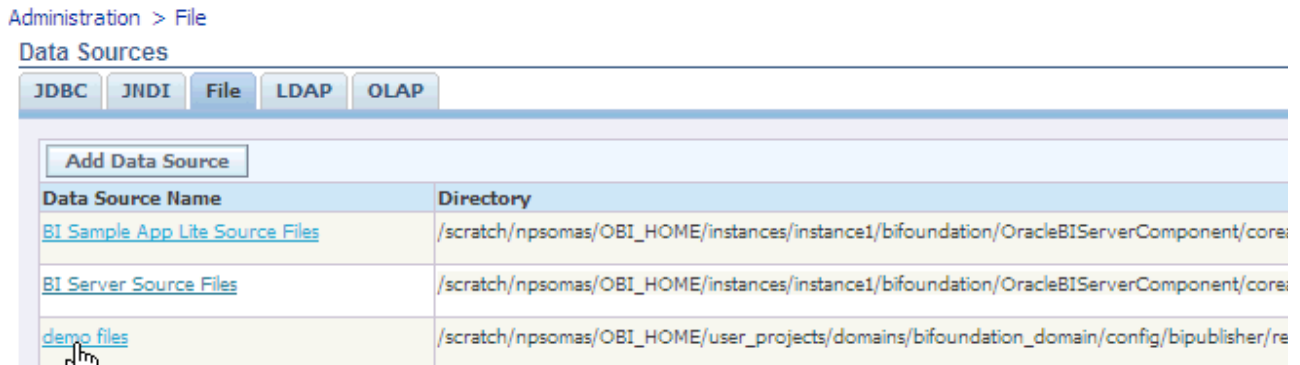
Note: You can also set up the the default connection **demo** to point to OE schema in your database, as the samples use this connection. Then the demo connection can be used as the default data source for this tutorial too.

Configuring File Data Location

1. BI Publisher ships with a repository of various sample files and reports. These are available in BI Publisher home.

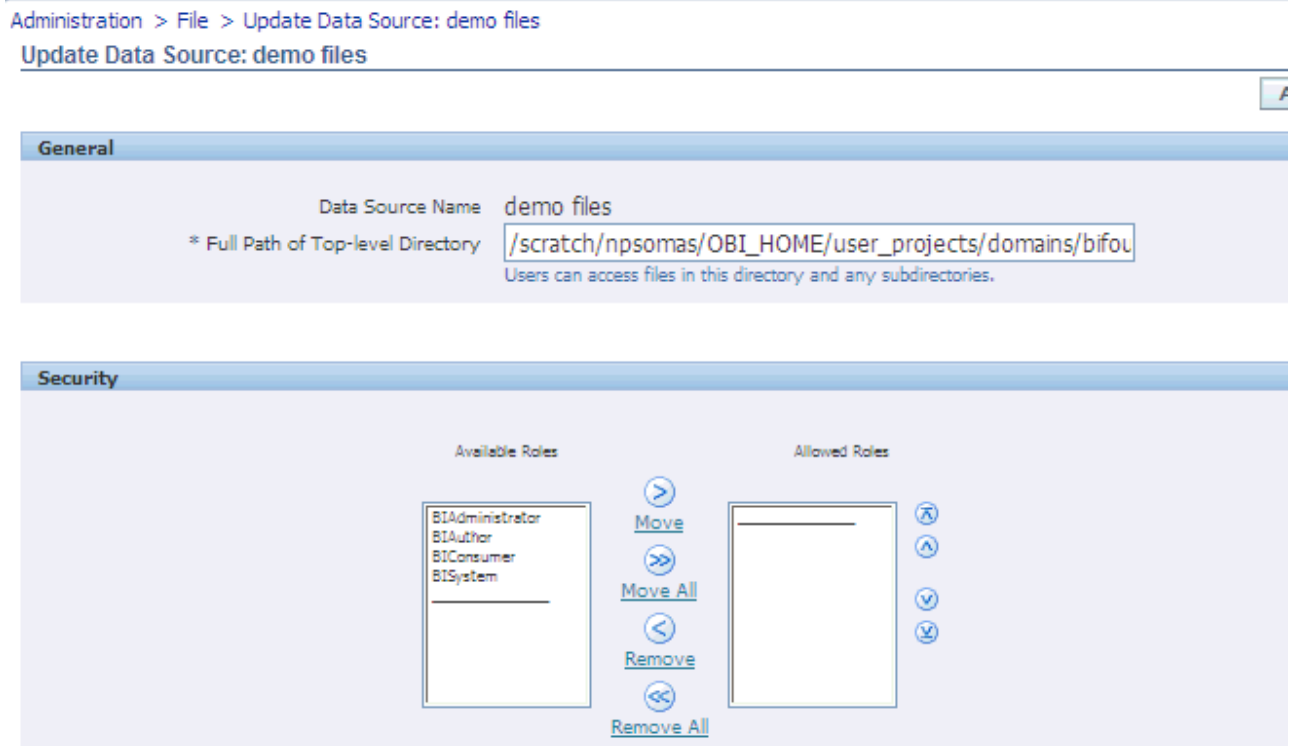
To define a File data source, click the **File** tab in the BI Publisher **Administration** page.

Click the **demo files** link to update the file location.



(If you want to create a File data source with a different name, you can click **Add Data Source**.)

2. Define the top level directory which has all the sample files (repository).



(Using this demo files data source, users can access all the files in the top level directory and also it's subdirectories).

Defining a JNDI (Java Naming and Directory Interface) Connection

BI Publisher supports connecting to a JDBC data source via a connection pool. Using a connection pool increases efficiency by maintaining a cache of physical connections that can be reused. When a client closes a connection, the connection gets placed back into the pool so that another client can use it.

Note: JNDI Connection concept is briefly introduced here, as you need to first set up the connection pool in your application server and access it via Java Naming and Directory Interface (JNDI). Then, you can define the JNDI connection in BI Publisher by entering the required fields in the JNDI connection definition page, so that BI Publisher can utilize the pool to establish connections.

Creating a Data Model

In release 11g, Oracle BI Publisher introduces the Data Model Editor, a graphical user interface for building data models within the BI Publisher interface. It enables you to perform the following tasks:

- *Create Data Sets* - Access data from a wide range of sources: RDBMS, OLAP, WebServices, BI Analyses, XML files, Excel and others.
- *Query data* – Build SQL or MDX queries to extract data from relational or multidimensional (OLAP) data sources.
- *Structure data* – Define master-detail relationships between data sets to group data at multiple levels to optimize document generation.
- *Aggregate data* – Create group level totals and subtotals.
- *Customize data* – Modify data field names to conform to business terms and reporting requirements.
- *Create calculations* – Compute data values that are not stored in the underlying data sources that are required for reporting.
- *Advanced tasks* – Define parameters and lists of values (LOV), triggers, and other advanced elements as required by reports and report users.

In this topic, you are guided to create Data Model based on SQL query using the JDBC connection you defined in the previous topic. Also, you will learn how to add parameters and LOVs to the data model.

[Defining Default Data Source, and Output Options](#)

[Creating a SQL Query Data Set](#)

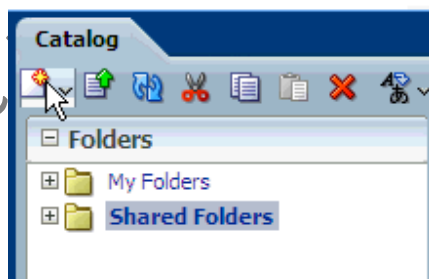
[Viewing the XML Output and Saving the Sample Data](#)

Defining Default Data Source, and Output Options

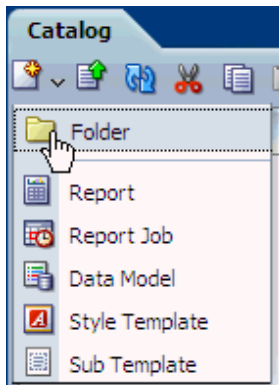
1. Note: Before starting the creation of Data Model, you will first create a folder to save all your objects such as reports, data models and so on.

In the **Home** page, click **Catalog** link under the **Browse/Manage** section.

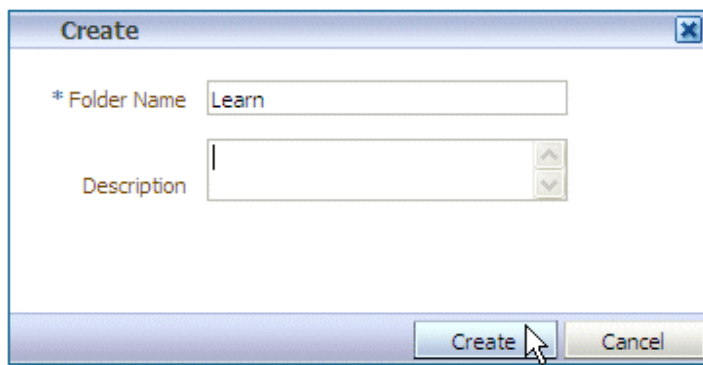
In the **Catalog** page that is displayed, select the **My Folders** node, click the **New** icon on the tool bar.



Select **Folder** from the drop-down menu to create a new folder.



Enter **Learn** as the name of the folder, (optionally enter a description), and click **Create**.

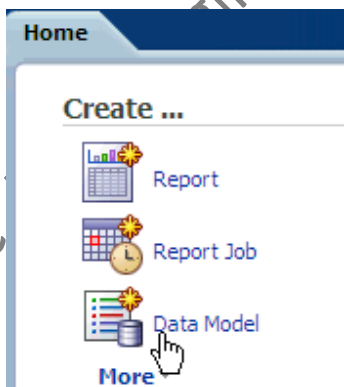


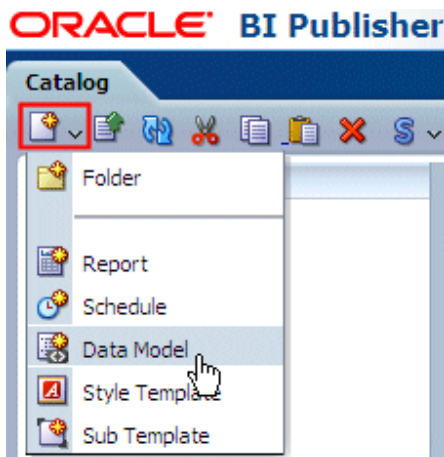
You can see that the folder gets listed in **My Folders**.

2. Now, you can invoke the Data Model editor in one of the following ways-

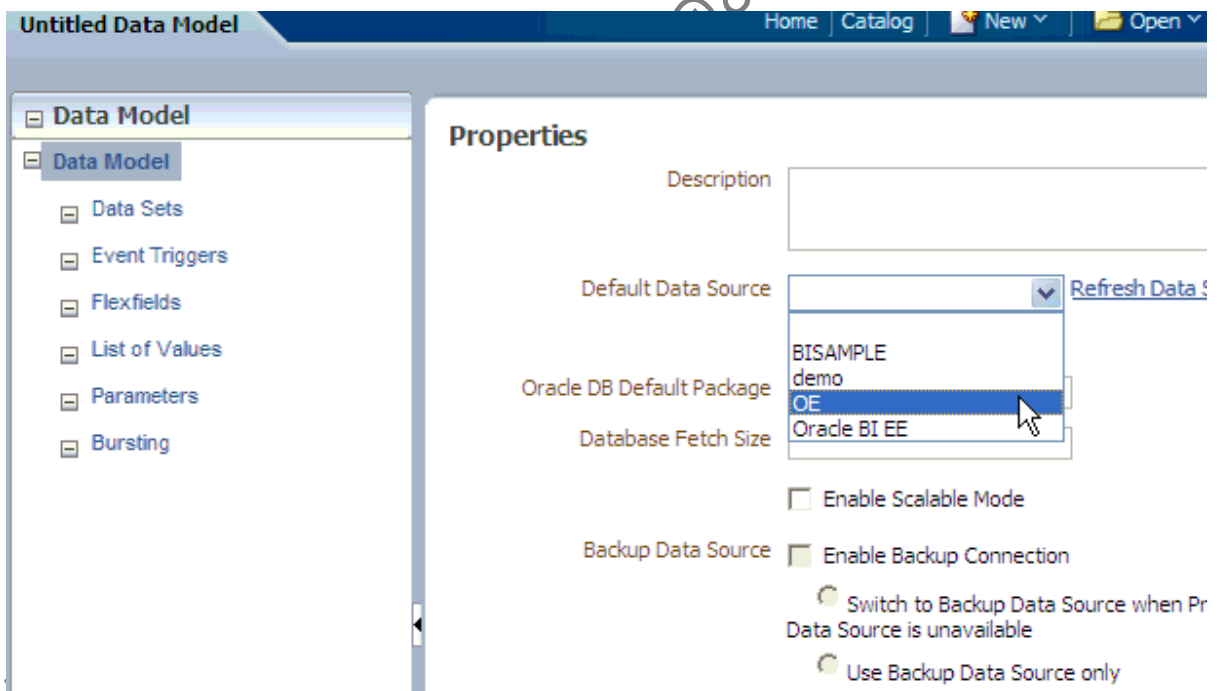
From the Home page **Create** section, select **Data Model**.

From the Catalog page, click **New** icon and select **Data Model** from the drop-down menu.



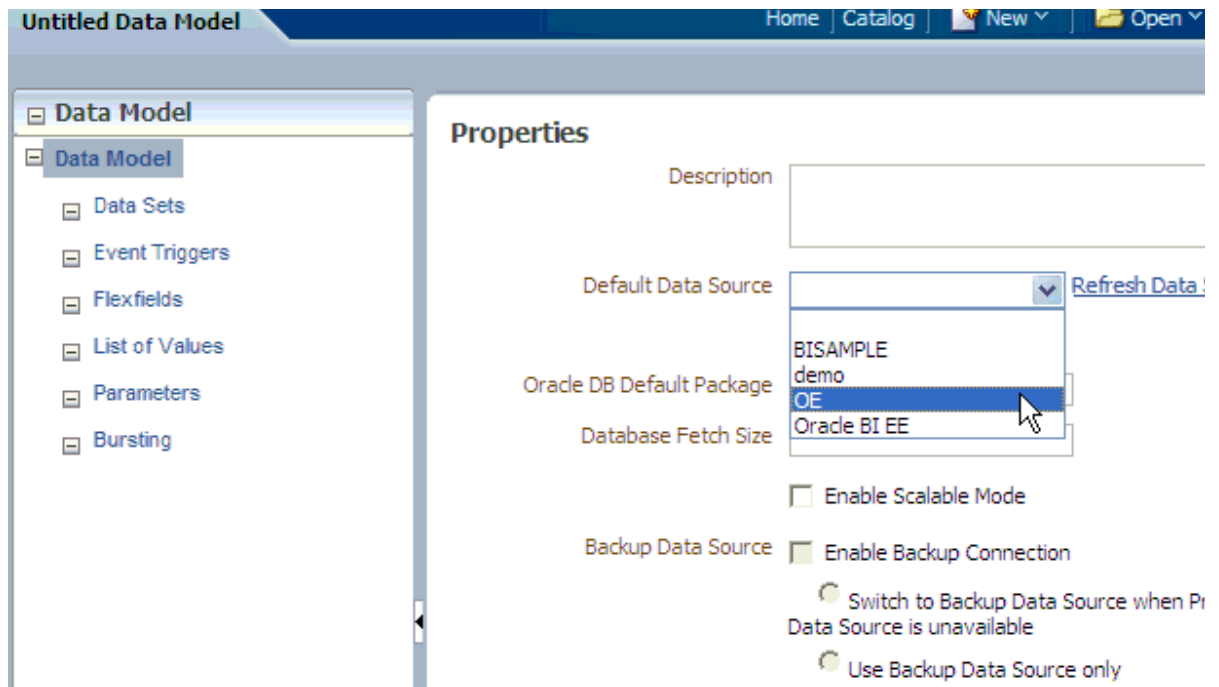


3. Observe the **Data Model Properties** page that is displayed on the right. Select a **Default Data Source** (that points to the OE schema in your database). Optionally, add a description to the data model.



Note:

Ensure that in the XML Output Options, the Include Parameter Tags is checked, and the Include Empty Tags for Null Elements, and Include Group List Tag check boxes are not checked.



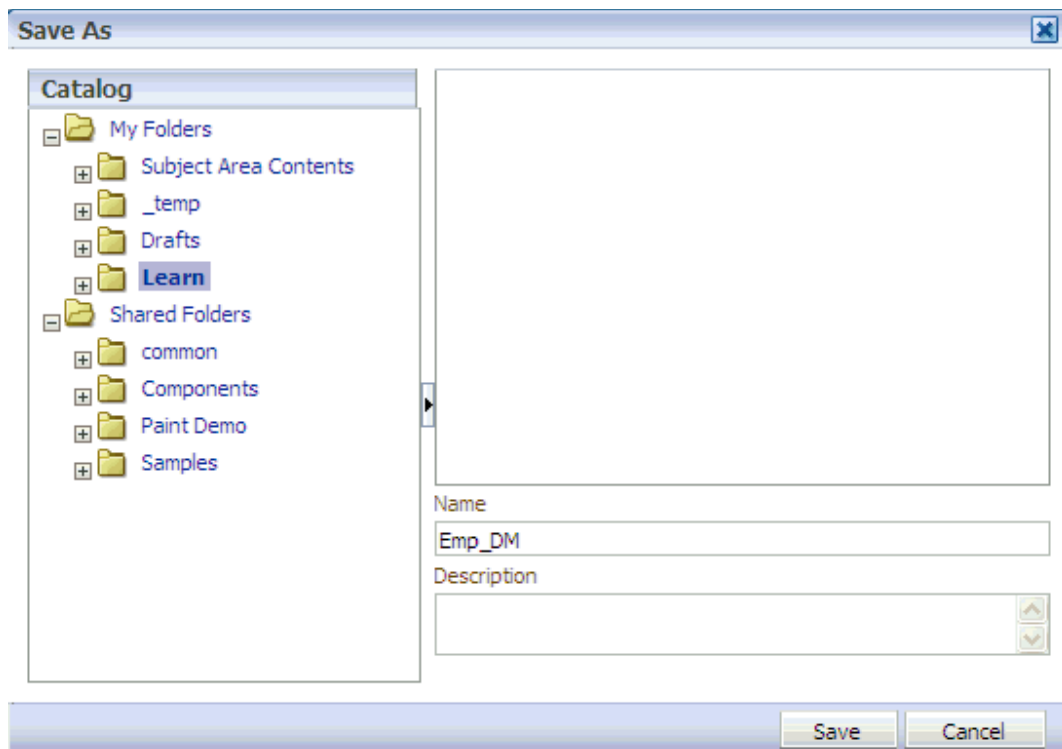
For defining the Default Data Source, you can also edit the default demo data source to point to the OE schema in your Database, and use it.

Also, note that on the Properties page you can set many options in addition to specifying a default data source. For example, you can specify DB default package, and DB fetch size (the data engine's default is 300), XML output options based on what XML tags you require in the resulting XML output.

- 4 . To save the data model with a name, click **Save As** icon found at the top right corner of the page.

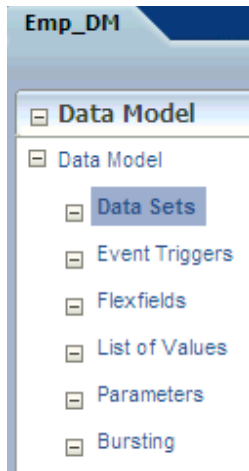


Navigate to the folder that you want to save the data model object (Learn in this example), enter an appropriate name for the Data Model , and click **Save**.

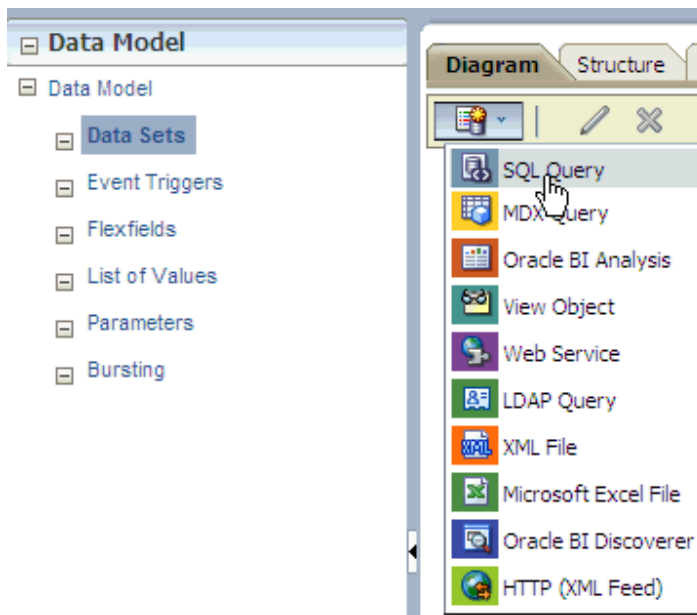


Creating a SQL Query Data Set with Parameters and LOVs

- 1 From the Data Model task pane on the left, select **Data Sets**.



- 2 From the Data Set drop-down menu, select SQL query as the type of data set.



- 3 In the **Create Data set -SQL** dialog box that appears, enter an appropriate name for the data set, accept the default data set option (as you have already defined it in the Data Model), and click **Query Builder** to create a query.

4 The **Query Builder** window appears displaying the **OE** schema objects on the left side.

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

5 Now, define a join between these two tables as follows:

- Click the box beside **DEPARTMENT_ID** column in the **DEPARTMENTS** table. Similarly click the box beside **DEPARTMENT_ID** column in the **EMPLOYEES** table. (These boxes, when marked for joins turn light gray.)
- Also note that a fine line joining the tables appears in the Model canvas.

Model Conditions SQL Results 10 Save Cancel

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

EMPLOYEES	
<input type="checkbox"/> PHONE_NUMBER	A
<input type="checkbox"/> HIRE_DATE	31
<input type="checkbox"/> JOB_ID	A
<input type="checkbox"/> SALARY	789
<input type="checkbox"/> COMMISSION_PCT	789
<input type="checkbox"/> MANAGER_ID	789
<input type="checkbox"/> DEPARTMENT_ID	789

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

Model Conditions SQL Results 10 Save Cancel

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

EMPLOYEES	
<input checked="" type="checkbox"/> FIRST_NAME	A
<input checked="" type="checkbox"/> LAST_NAME	A
<input type="checkbox"/> EMAIL	A
<input type="checkbox"/> PHONE_NUMBER	A
<input checked="" type="checkbox"/> HIRE_DATE	31
<input type="checkbox"/> JOB_ID	A
<input checked="" type="checkbox"/> SALARY	789

- 7 Click the **Conditions** Tab . Change the column names and remove "_" to have more appropriate aliases.
- Change the aliases for the columns as below:

DEPARTMENT_NAME to DepartmentName
FIRST_NAME to FirstName
LAST_NAME to LastName
HIRE_DATE to HireDate

SALARY to Salary

Model	Conditions	SQL	Results	10
Column	Alias			
DEPARTMENT_NAME	DepartmentName			
FIRST_NAME	FirstName			
LAST_NAME	LastName			
HIRE_DATE	HireDate			
SALARY	Salary			

- 8 Also, type "IN (:P_DNAME)" in the **Condition** field for the department name column, as shown in the screen below. This will define a parameter **P_DNAME** on the department name column.

Model	Conditions	SQL	Results	10	Save	Cancel
Column	Alias	Object	Condition			
DEPARTMENT_NAME	DepartmentName	DEPARTMENTS	IN (:P_DNAME)			
FIRST_NAME	FirstName	EMPLOYEES				
LAST_NAME	LastName	EMPLOYEES				
HIRE_DATE	HireDate	EMPLOYEES				
SALARY	Salary	EMPLOYEES				

Note: The *IN condition* is being used here for the parameter to accept All or Multiple values for the department name column.

The aliases and display names can be changed in the Data Model page, either in the Diagram or in the Structure too:

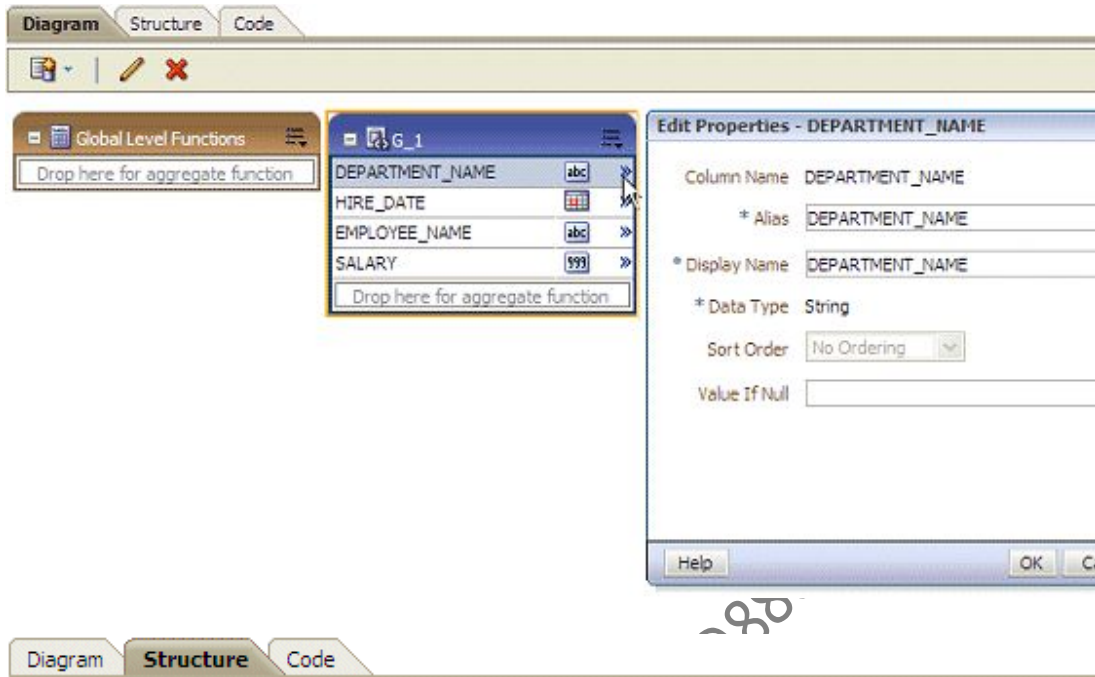
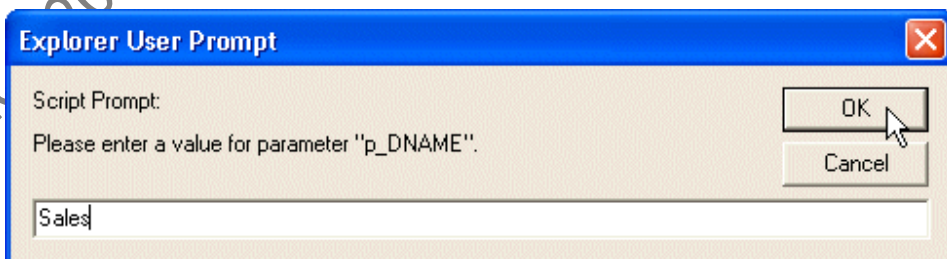


Table View | Output

	XML View			Business View
Data Source	XML Tag Name	Sorting	Value If Null	Display Name
Report Data				
Data Structure	DATA_DS			
Emp_DataSet	G_1			G_1
abc DEPARTMENT_NAME	DEPARTMENT_NAME	↓		DEPARTMENT_NAME
HIRE_DATE	HIRE_DATE	↓		HIRE_DATE
abc EMPLOYEE_NAME	EMPLOYEE_NAME	↓		EMPLOYEE_NAME
999 SALARY	SALARY	↓		SALARY

- 9 Click **Results** to see how the query results appear in Query Builder. This will prompt you to enter a department name for the parameter, enter **Sales** and click OK.



View results. Click **Save** to save the query.

Model	Conditions	SQL	Results	10	Save	Cancel
Department	FirstName	LastName	HireDate	Salary		
Sales	John	Russell	1996-10-01 00:00:00.0	14000		
Sales	Karen	Partners	1997-01-05 00:00:00.0	13500		
Sales	Alberto	Errazuriz	1997-03-10 00:00:00.0	12000		
Sales	Gerald	Cambraut	1999-10-15 00:00:00.0	11000		
Sales	Eleni	Zlotkey	2000-01-29 00:00:00.0	10500		
Sales	Peter	Tucker	1997-01-30 00:00:00.0	10000		
Sales	David	Bernstein	1997-03-24 00:00:00.0	9500		
Sales	Peter	Hall	1997-08-20 00:00:00.0	9000		
Sales	Christopher	Olsen	1998-03-30 00:00:00.0	8000		
Sales	Nanette	Cambraut	1998-12-09 00:00:00.0	7500		

- 1 This takes you back to the **Create Data set -SQL** dialog box, and observe that the query you created is reflected in the **SQL Query** area.
- 0 Enter an appropriate name such as **Emp_DataSet**, and click **OK** to add this data set to your data model.

Create Data Set - SQL

* Name

Emp_DataSet

Data Source

☒ Default Data Source
 ☐ demo
 [Refresh Data Source List](#)

* SQL Query

Query Builder

```

select  "DEPARTMENTS"."DEPARTMENT_NAME" as "DepartmentName",
        "EMPLOYEES"."FIRST_NAME" as "FirstName",
        "EMPLOYEES"."LAST_NAME" as "LastName",
        "EMPLOYEES"."HIRE_DATE" as "HireDate",
        "EMPLOYEES"."SALARY" as "Salary"
from    "OE"."EMPLOYEES" "EMPLOYEES",
        "OE"."DEPARTMENTS" "DEPARTMENTS"

where   "DEPARTMENTS"."DEPARTMENT_ID"="EMPLOYEES"."DEPARTMENT_ID"
and     "DEPARTMENTS"."DEPARTMENT_NAME" IN (:P_DNAME)
          
```

Help

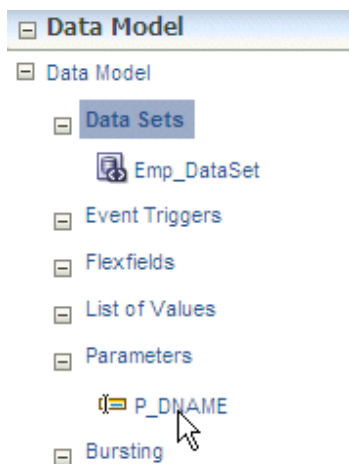
OK Cancel

- 1 A message asks whether you want to create a bind variable. Click OK. to create the parameter

1



Note that the parameter created is listed on the left under Parameters node in Data Model:



Every time you make changes to the Data Model (changes to the data set, adding parameters or any other changes), click **Save** icon (found at the top right corner) to save the Emp_DM data Model .

- 1 In the Data Model pane, click **List of Values** node. In the List of Values pane click the the + sign to
- 2 Create new List of Values.

Select the following Options:

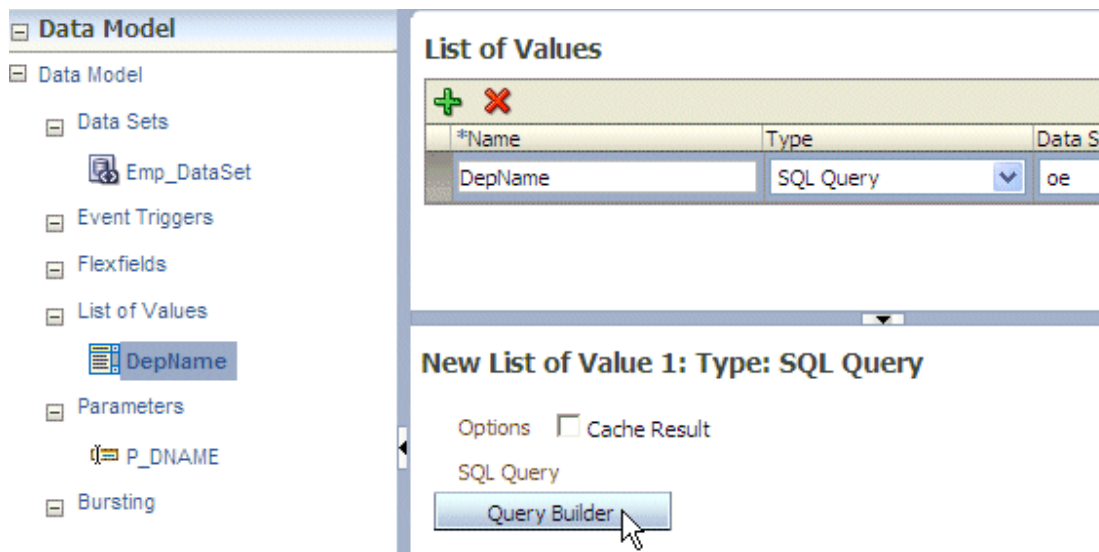
Enter **DepName** as the **Name** of the LOV

Select **SQL Query** as the **Type** from the drop-down list

Ensure that **OE** is selected as the Data Source

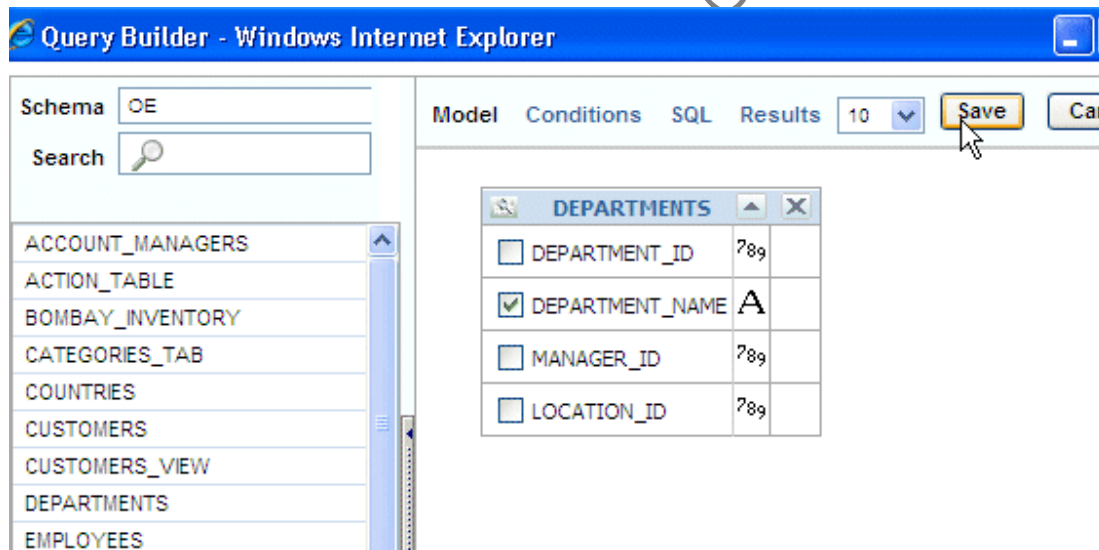
Click **Query Builder** to define the query that returns department names for the LOV

Save the Data Model.

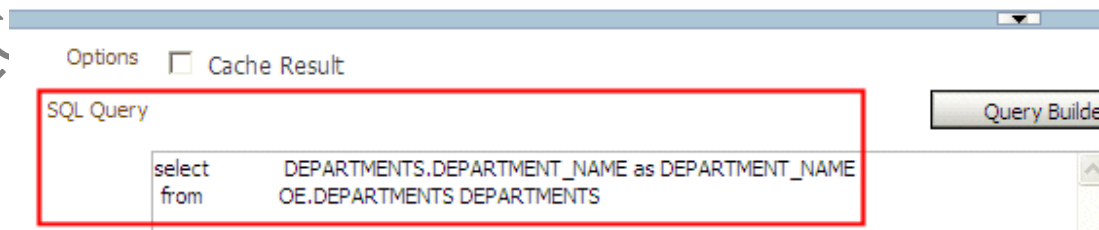


1 In the Query Builder page, select **DEPARTMENT_NAME** from the **DEPARTMENTS** table. Click **Save**.

3



Click **Save** to save the Data Model. The query for the LOV should look like this:



1 Now, set the properties for the P_DNAME parameter to use this LOV:

4

- Select **P_DNAME** parameter listed under the **Parameters** node.

Enter Default value as * (the character star) , and select **Menu** as the **Parameter Type** (the default parameter type is Text).

Parameters

*Name	Data Type	Default Value	Parameter Type
P_DNAME	String	*	Text

Text
Menu
Date
Search

1 Ensure that **DepName** is selected as the **List of Values** for the parameter.

5 Ensure that **Multiple Selection**, **Can select all**, and **All Values Passed** options are selected.

- (These options allow you to select all / multiple values for the department.)

Also, change the Display Label to an appropriate one like- **Department**:

Parameters

*Name	Data Type	Default Value	Parameter Type
P_DNAME	String	*	Menu

P_DNAME

Menu Setting

Display Label

List of Values

Options

☒ Multiple Selection

☒ Can select all

☐ NULL Value Passed ☒ All Values Passed

☐ Refresh other parameters on change

Click **Save** to save the Data Model.

1 You can edit the query manually further to concatenate Last Name and First Name columns as Employee

6 Name. Edit the query to look like this:

```
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 OE.DEPARTMENTS DEPARTMENTS,
OE.EMPLOYEES EMPLOYEES
where DEPARTMENTS.DEPARTMENT_ID=EMPLOYEES.DEPARTMENT_ID
and DEPARTMENTS.DEPARTMENT_ID IN (:P_DNAME)
```

Click OK and save the data model.

The query should look like this in Query Builder:

Edit Data Set

* Name:

* Data Source: ☒ Default Data Source
☐ demo

* SQL 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    "OE"."EMPLOYEES" "EMPLOYEES",
        "OE"."DEPARTMENTS" "DEPARTMENTS"

where   "DEPARTMENTS"."DEPARTMENT_ID"="EMPLOYEES"."DEPARTMENT_ID"
and     "DEPARTMENTS"."DEPARTMENT_NAME" IN (:P_DNAME)
```

Help OK Cancel

Note: Once you edited the query manually, you will not be able to edit in the Query Builder.

Viewing the XML Output and Saving the Sample Data

- 1 . You may have observed that In the current version of the BI Publisher, you can preview the XML data for the data

model.

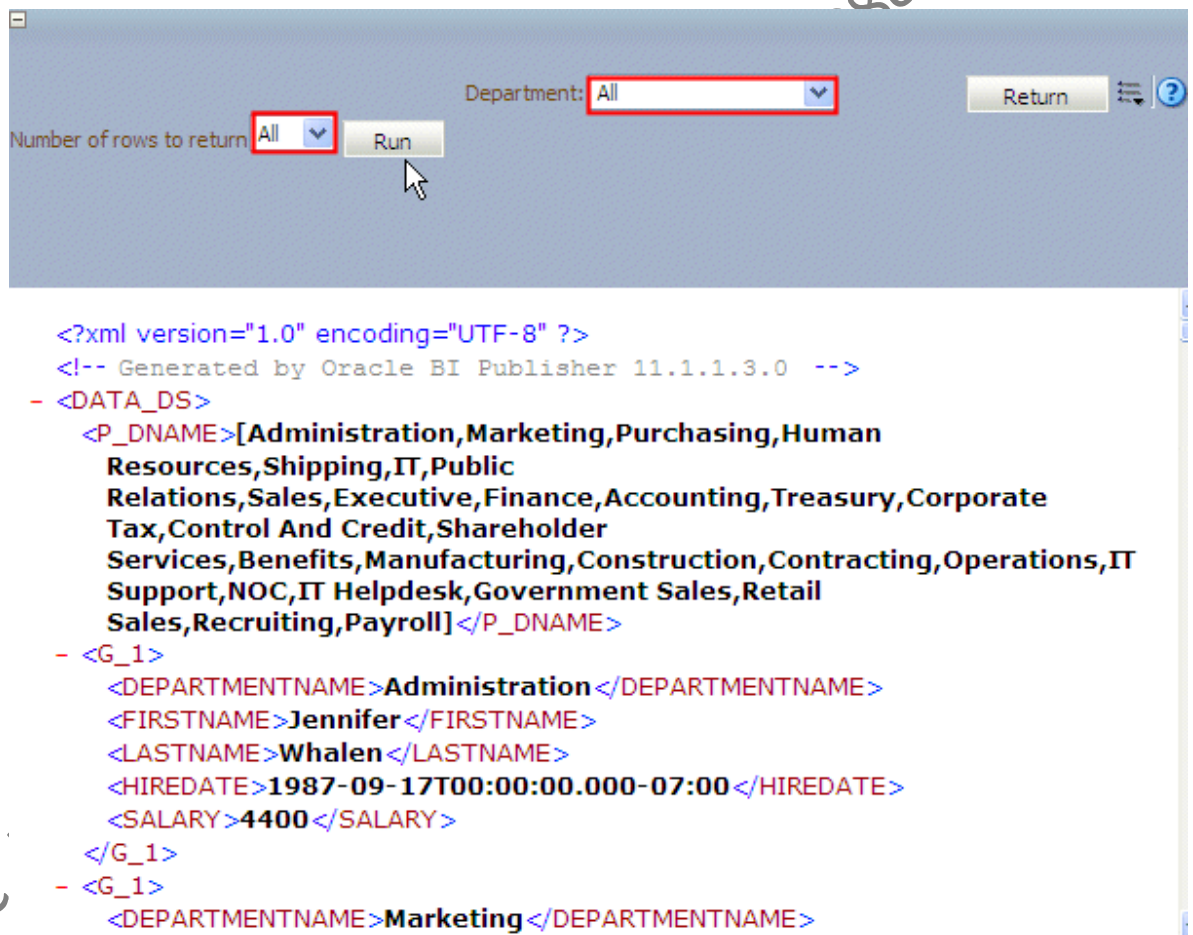
Click the **XML** icon (found at the right top corner of the page), to see the XML output for the data model you defined in previous topic.



Note that **All** is selected for the Department parameter (as this is the default value).

Select **All** for the number of rows, and click **Run** to see the XML data output for all the departments:

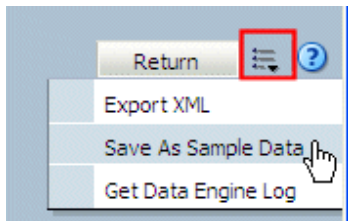
(A portion of the XML data is displayed here in the screen)



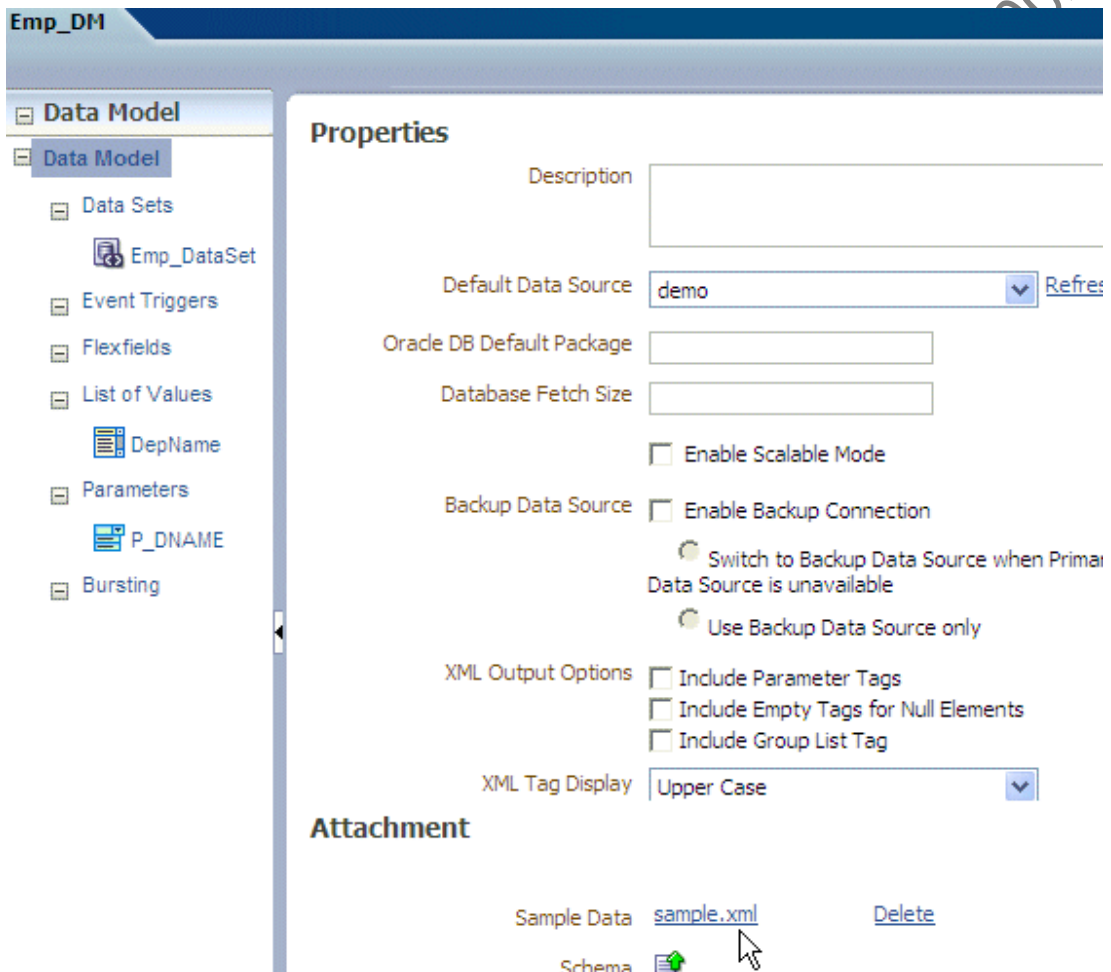
The screenshot shows the Oracle BI Publisher interface. At the top, there is a 'Department' dropdown menu set to 'All' and a 'Return' button. Below it, the 'Number of rows to return' is set to 'All' and a 'Run' button is visible. The XML output is displayed below the controls. The XML starts with a declaration and a comment, followed by a root element <DATA_DS>. Inside this root, there is a list of department names under the <P_DNAME> element. The first department, 'Administration', is expanded under the <G_1> group, showing employee details for Jennifer Whalen, including her hire date and salary. The second department, 'Marketing', is also listed under the <G_1> group.

```
<?xml version="1.0" encoding="UTF-8" ?>
<!-- Generated by Oracle BI Publisher 11.1.1.3.0 -->
- <DATA_DS>
  <P_DNAME>[Administration,Marketing,Purchasing,Human
    Resources,Shipping,IT,Public
    Relations,Sales,Executive,Finance,Accounting,Treasury,Corporate
    Tax,Control And Credit,Shareholder
    Services,Benefits,Manufacturing,Construction,Contracting,Operations,IT
    Support,NOC,IT Helpdesk,Government Sales,Retail
    Sales,Recruiting,Payroll]</P_DNAME>
  - <G_1>
    <DEPARTMENTNAME>Administration</DEPARTMENTNAME>
    <FIRSTNAME>Jennifer</FIRSTNAME>
    <LASTNAME>Whalen</LASTNAME>
    <HIREDATE>1987-09-17T00:00:00.000-07:00</HIREDATE>
    <SALARY>4400</SALARY>
  </G_1>
  - <G_1>
    <DEPARTMENTNAME>Marketing</DEPARTMENTNAME>
```

2 . To save this as sample data, click the Open Menu drop-down list icon, and select **Save as Sample Data**.



You can see that the sample.xml is listed in the Sample Data section of the Data Model (as shown below)



Note: It is very important to save sample data for a data model, else when creating Layouts, the previews do not appear correctly.

You can select various values (multiple/ single) for Department to see the data. You can also restrict the number of rows that you want to see:

Number of rows to return

5

5

10

50

100

All

Department: All

All

Administration

Marketing

Purchasing

Human Resources

Shipping

IT

Public Relations

Sales

Executive

Finance

Accounting

Treasury

Corporate Tax

Control And Credit

Shareholder Services

Benefits

Manufacturing

Construction

Contracting

Operations

IT Support

NOC

IT Helpdesk

Government Sales

Retail Sales

Recruiting

Payroll

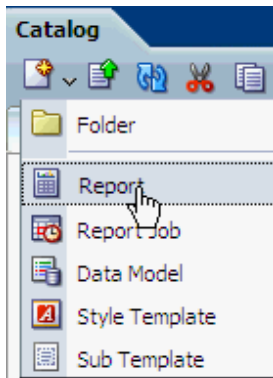
Creating a Report

In this topic, you learn to create a report using the Data Model that you defined in the previous topic. You also create a simple layout using Layout Editor, and edit parameters.

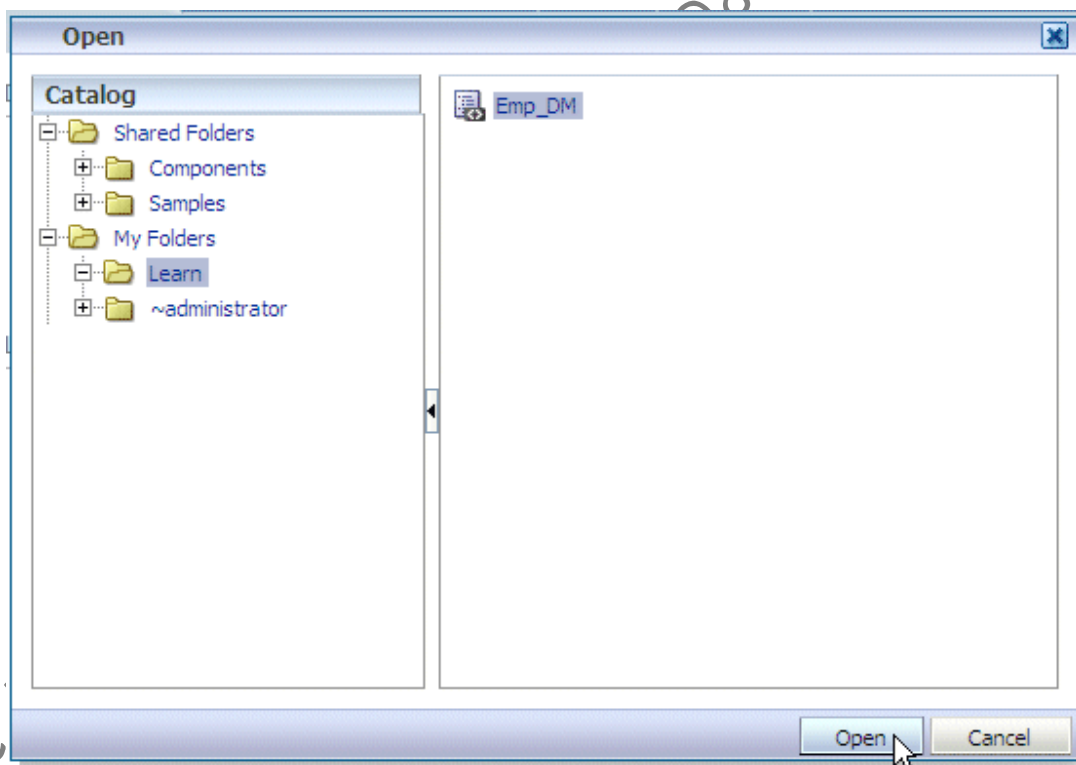
Note: The steps in this topic are all continuous, so do not close any window or logout from BI Publisher unless you are asked to do so.

- 1 . If not logged in, login into BI Publisher, and go to My Folders> Learn folder in Catalog pane.

Click New (found at the top left corner of page) to see the drop-down menu and click Report to create a new report.

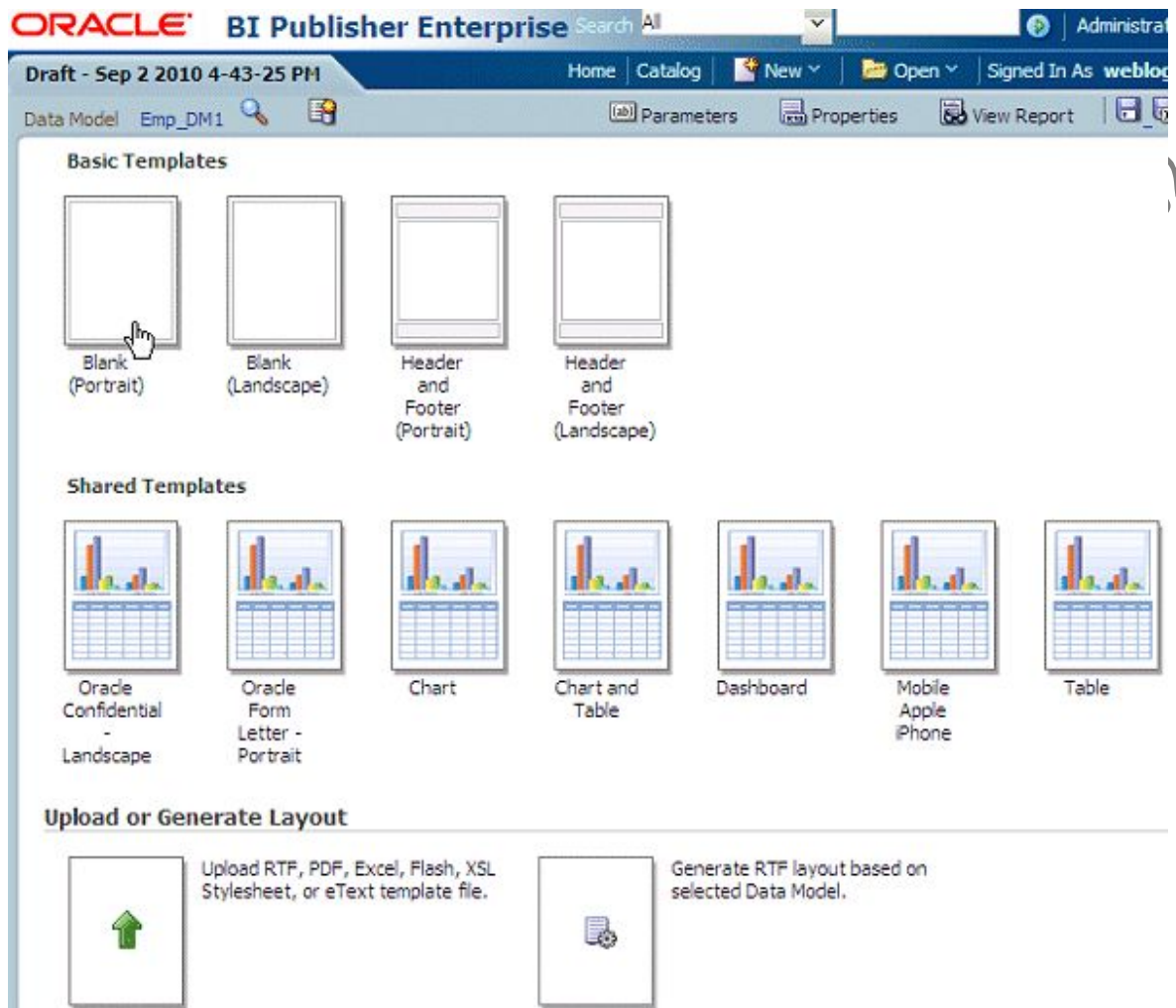


- 2 . Navigate to **My Folders> Learn**. Select **Emp_DM** data model and click **Open**.



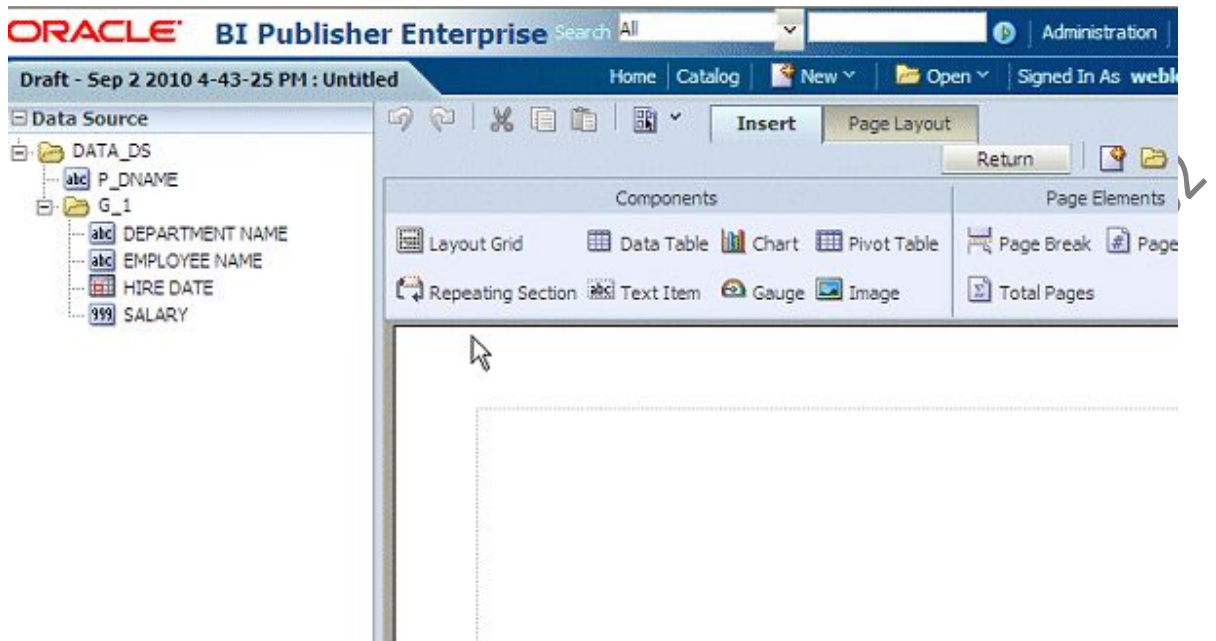
It displays the options to create, use a shared template, or upload a report layout.

Select Blank (Portrait) under the Basic Templates section to create a simple report layout.

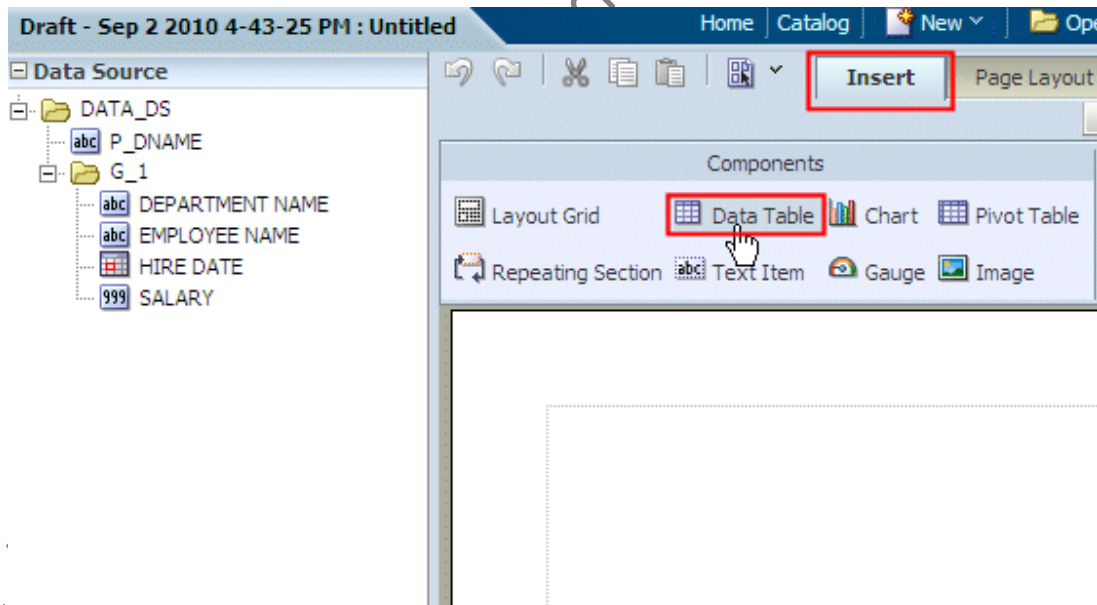


Note: You can define a Layout for the report at the time of creating report, or create it at a later point of time. *Creating report layouts using the Layout Editor is covered in detail in the next topic.*

3. This opens Layout Editor, with a blank page:



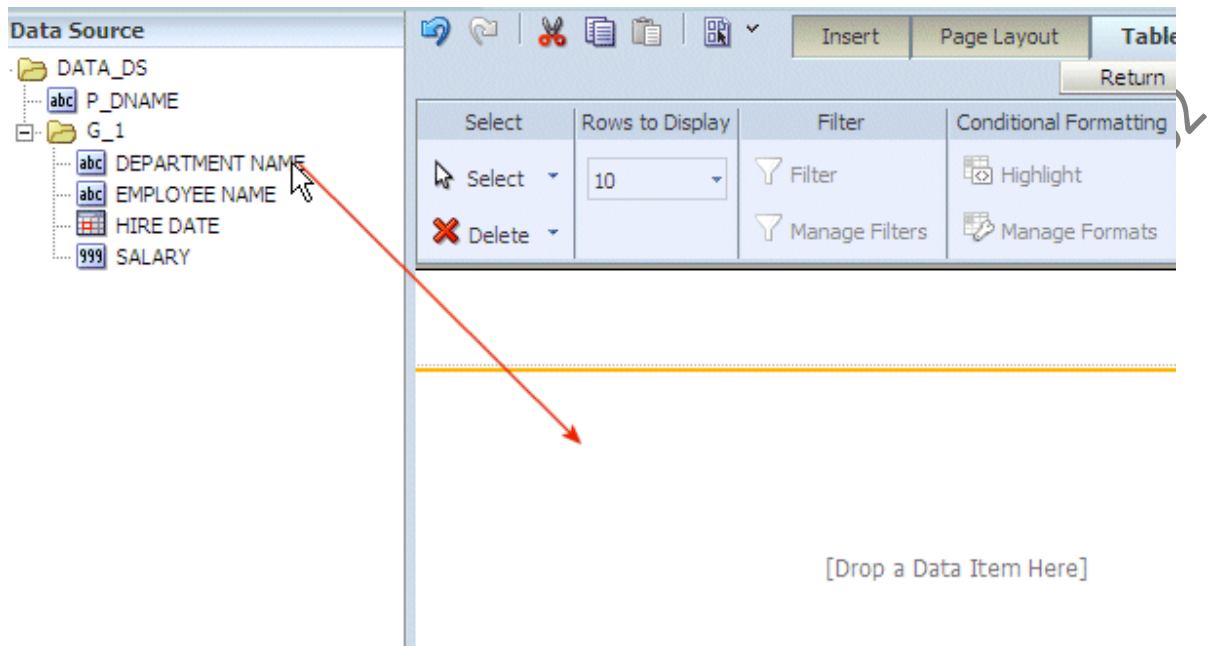
4. Click Insert > Data Table from the menu to insert a data table in the layout page.



5. Select and drag the elements in the following order from the **Data Source** pane to the [Drop a Data Item Here] area of the table:

DEPARTMENT_NAME
EMP_NAME
HIRE DATE

SALARY

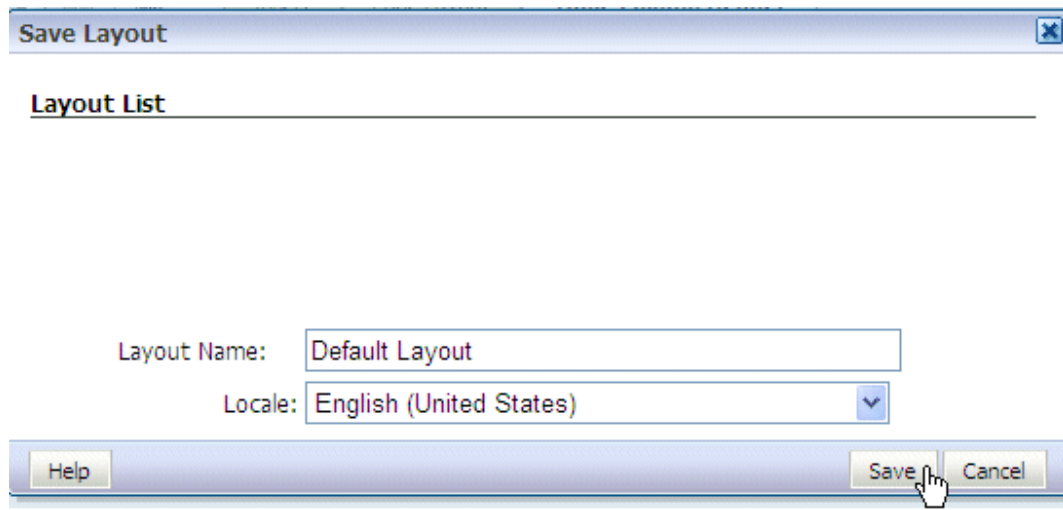


As you drag an element, position each successive item directly to the right of the previous element and release to create each column, so that the data table, after adding all the columns it looks like this:

DEPARTMENT NAME	EMPLOYEE NAME	HIRE DATE	SALARY
Administration	Jennifer Whalen	1987-09-17T00:00:00.000-07:00	4400
Marketing	Michael Hartstein	1996-02-17T00:00:00.000-08:00	13000
Marketing	Pat Fay	1997-08-17T00:00:00.000-07:00	6000
Purchasing	Den Raphaely	1994-12-07T00:00:00.000-08:00	11000
Purchasing	Alexander Khoo	1995-05-18T00:00:00.000-07:00	3100
Purchasing	Shelli Baida	1997-12-24T00:00:00.000-08:00	2900
Purchasing	Sigal Tobias	1997-07-24T00:00:00.000-07:00	2800
Purchasing	Guy Himuro	1998-11-15T00:00:00.000-08:00	2600
Purchasing	Karen Colmenares	1999-08-10T00:00:00.000-07:00	2500
Human Resources	Susan Mavris	1994-06-07T00:00:00.000-07:00	6500
			684400

- Click the **Save** icon found on the top right corner to save this layout.

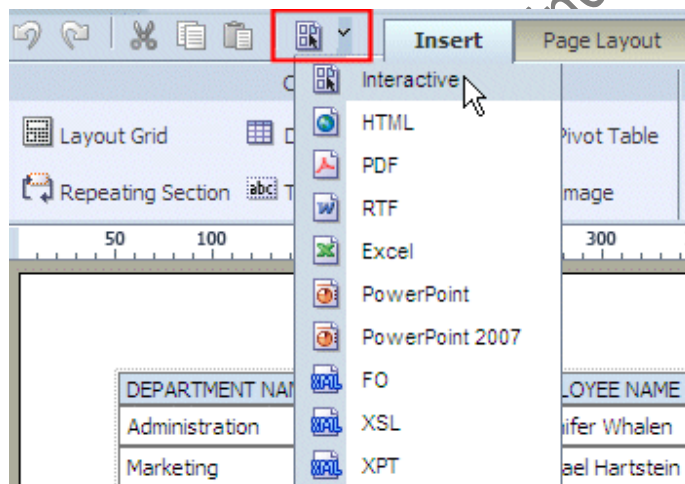
Enter **Default Layout** as the name of the layout, and click **Save**.

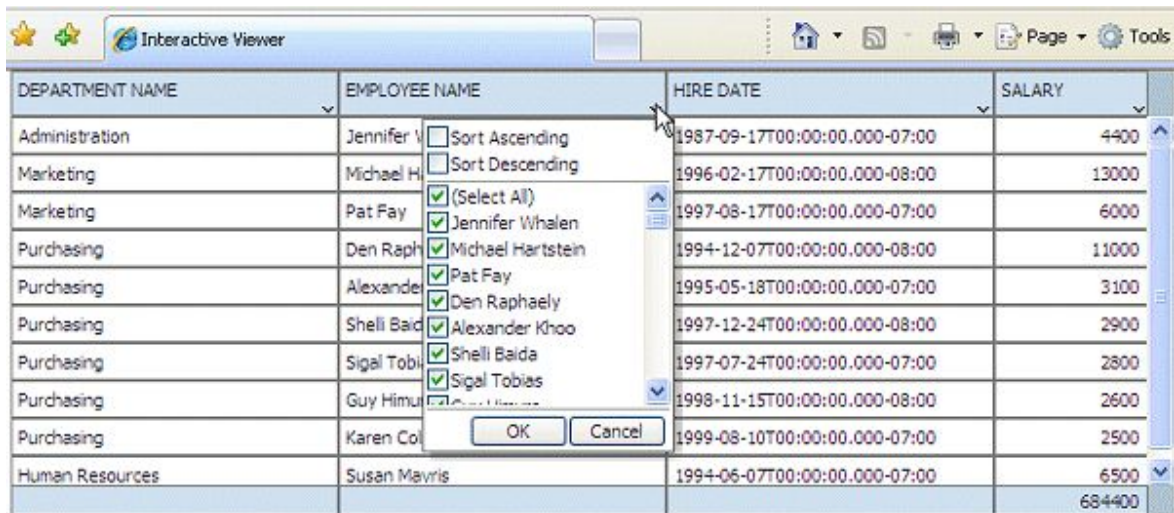


The 'Save Layout' dialog box contains a 'Layout List' section at the top. Below it, there are two input fields: 'Layout Name' with the text 'Default Layout' and 'Locale' with a dropdown menu showing 'English (United States)'. At the bottom, there are three buttons: 'Help', 'Save', and 'Cancel'. A mouse cursor is pointing at the 'Save' button.

7. This brings you back to the Layout Editor.

Click the **Preview** icon drop-down list (highlighted in the screen) to preview the data in Interactive format (this is also the default format).



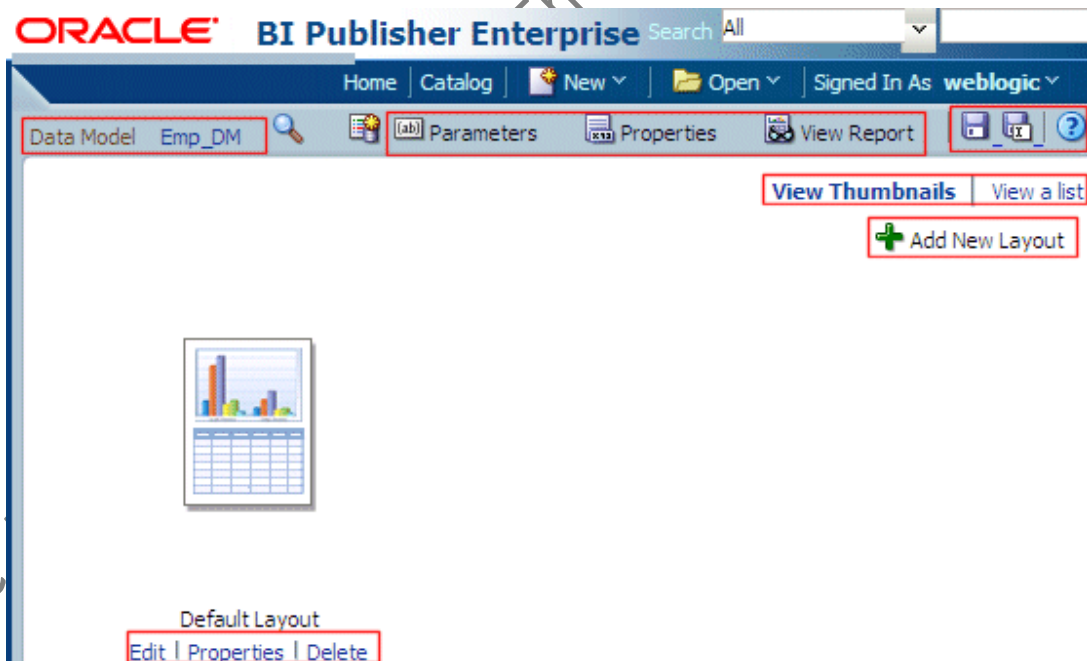


DEPARTMENT NAME	EMPLOYEE NAME	HIRE DATE	SALARY
Administration	Jennifer W	1987-09-17T00:00:00.000-07:00	4400
Marketing	Michael H	1996-02-17T00:00:00.000-08:00	13000
Marketing	Pat Fay	1997-08-17T00:00:00.000-07:00	6000
Purchasing	Den Raph	1994-12-07T00:00:00.000-08:00	11000
Purchasing	Alexander	1995-05-18T00:00:00.000-07:00	3100
Purchasing	Shelli Bal	1997-12-24T00:00:00.000-08:00	2900
Purchasing	Sigal Tob	1997-07-24T00:00:00.000-07:00	2800
Purchasing	Guy Himu	1998-11-15T00:00:00.000-08:00	2600
Purchasing	Karen Col	1999-08-10T00:00:00.000-07:00	2500
Human Resources	Susan Mavris	1994-06-07T00:00:00.000-07:00	6500
			684400

Note: You can perform sorts and selection interactively here. Close the Interactive Viewer.

8. Click **Return** in Layout Editor to return to the **Edit** mode of the report.

Observe the various links on this page that will help you edit the data model, parameters, properties, and layouts for the report. You can also display the layouts as Thumbnails or as a List.

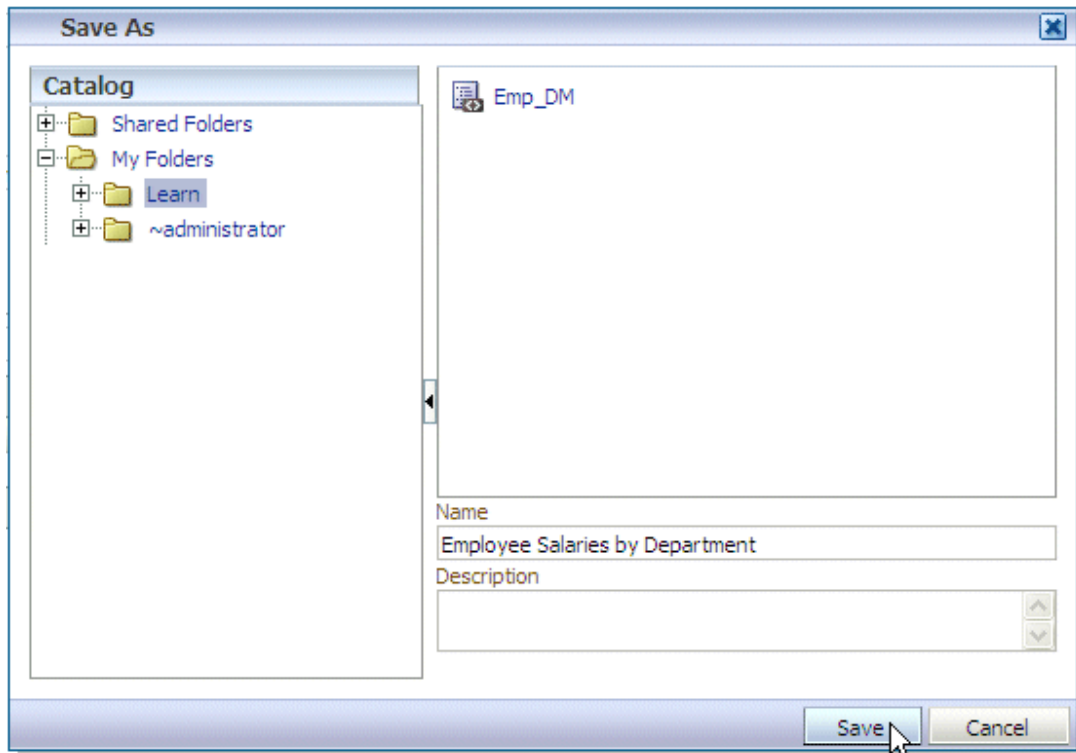


Note: **Parameters** link is displayed, only when the data model you selected for a report has parameters defined.

9. Click **Save** icon (found at the top right corner of the page) to save the report. (You can also click Save As icon).



Navigate to **My Folders> Learn**. Enter **Employee Salaries By Department** as the report name and click **Save**.



- 10 . Click the **Parameters** link and it shows the details for the parameters. You can make changes to the parameter values. Also, you can opt to show or not to show the parameter in the report.

Clear the **Show** check box not to show the parameter.

Note: The report parameters are edited here not to show them in layouts. (This is not mandatory, but this is being done here to depict all the data in the layout graphs that you will create in the next topic.)

Show	Name	Display Label	Default Value	Type	Multiple
<input checked="" type="checkbox"/>	P_DNAME	Department:	All	Menu	False

Parameters Display per line: 3

Building a Layout Using Layout Editor

Release 11g of Oracle BI Publisher introduces an online Layout Editor, a design tool to create and publish report layouts from within BI Publisher interface. The Layout Editor provides an intuitive drag-and-drop interface for adding common components to your report layout from within your web browser. The Layout Editor uses the sample data in the data model to immediately populate your layout components with report data during design-time. It also provides many advanced features to fully customize your reports.

The Layout Editor provides a new Interactive output type in addition to output types like PDF, RTF, Excel, PowerPoint, and HTML. Interactive output enables lightweight interactions with the report data from within the browser such as Excel-like filtering and sorting of tabular data with fixed headers and footers

In this topic, you will design a layout with graphs and using the Layout Editor, for the **Employee Salaries by Department** report that you created in the previous topic.

[Launching the Layout Editor and Adding a Grid Layout](#)

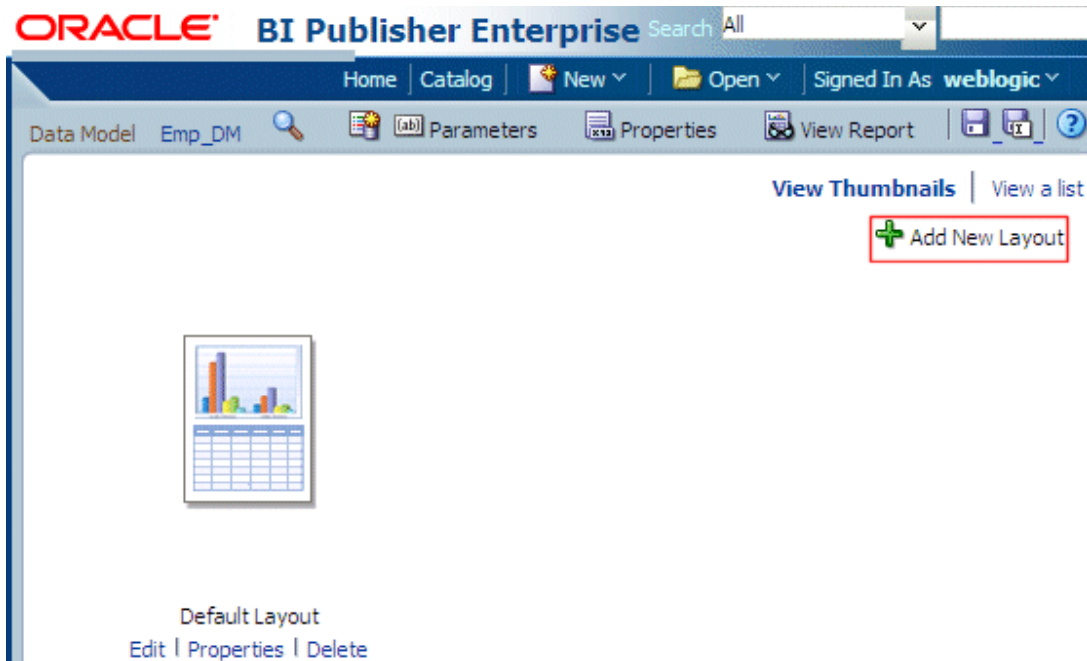
[Working with Charts](#)

[Adding a Data Table to the Layout](#)

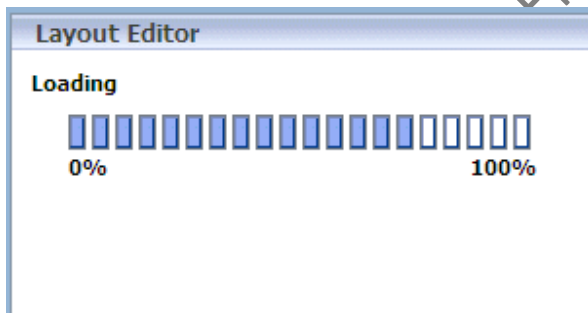
[Formatting the Data, and Working with the Page Layout Features](#)

Launching the Layout Editor and Adding a Grid Layout

1. Click Return to return to the **Edit** mode of the report. (If the report Now, click **Add New Layout** link to create a new layout for the report.

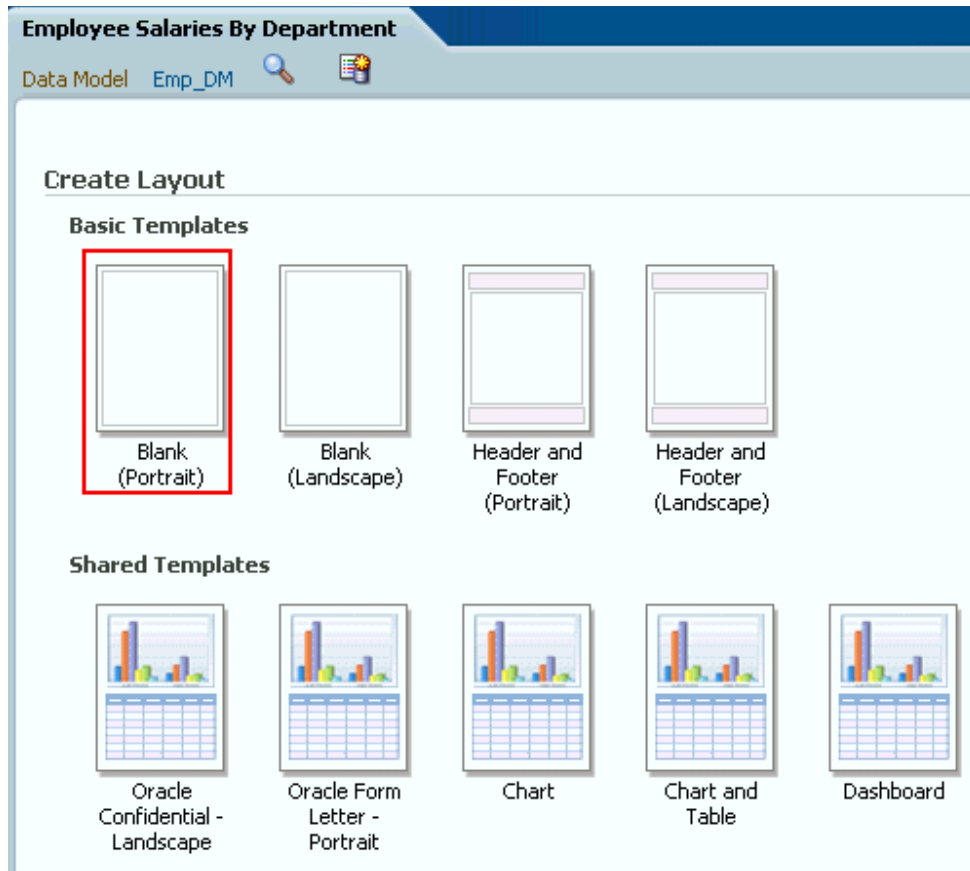


2. The **Layout Editor** is invoked, and displays the available **Basic** and **Shared templates** (templates for report layouts) to choose from.



It displays the options to create, use a shared template, or upload a report layout.

Click **Blank (Portrait)** from the **Basic Templates** section to manually design the layout.

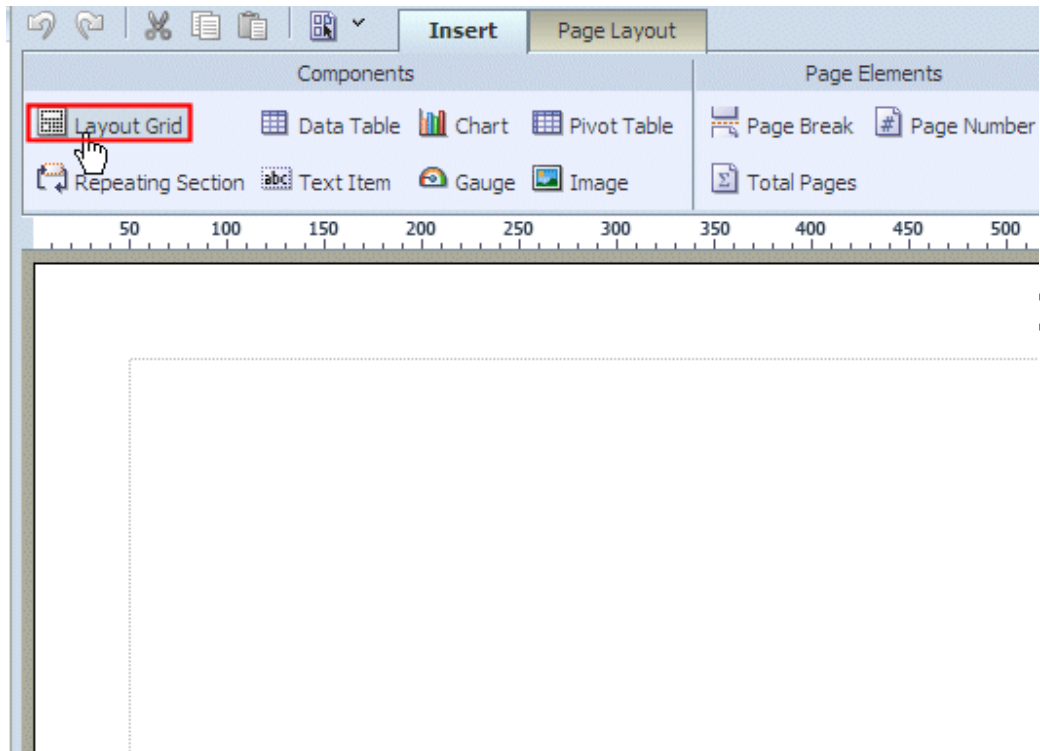


Note: It is a good practice to use Pre-built templates for reports because:

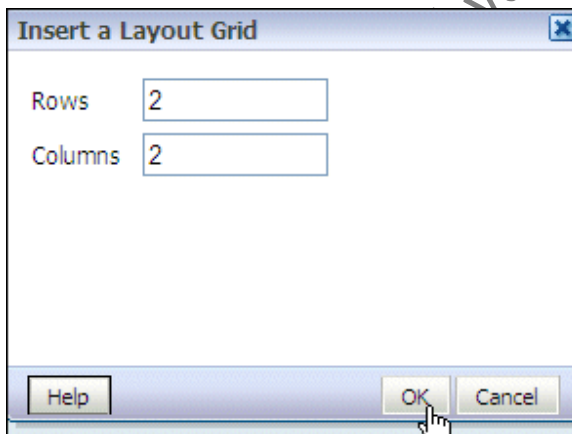
- They encourage consistent look and feel for layouts
- They make report authors much more productive by taking care of elements like headers and footers.

However, here a blank portrait is being used to show how to create a template from scratch.

- 3 . This shows blank page (portrait) in Layout Editor . Click **Layout Grid** to insert a grid.



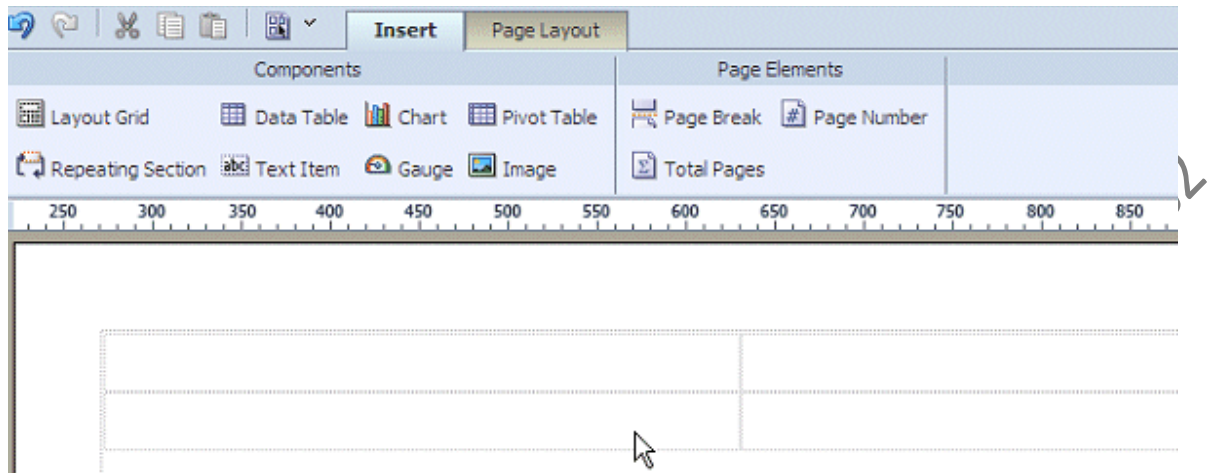
In the **Insert a Layout Grid** screen, enter **2** as the number of rows and **2** as the number of columns for the grid. Click **OK**.



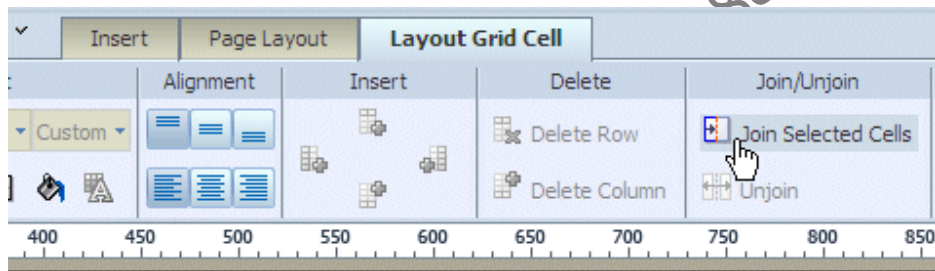
(You will add various report components such as charts, tables, and pivot tables in the the grid rows and columns in the next subtopics.)

Note: Using Layout Grids to control pixel perfect placement of objects in the layout is a best practice.

4. The layout grid with 2 rows and 2 columns is added:

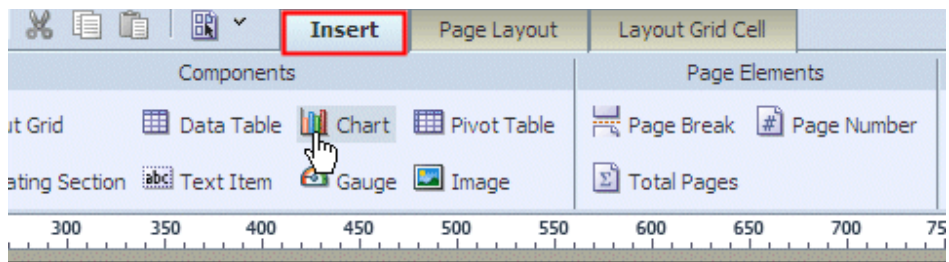


Now, merge the cells in the second row. Use <CTRL> key to select both the cells in the second row of the grid, (when the cells are selected, the color turns yellow) click **Join Selected Cells** option available in the **Layout Grid** menu.

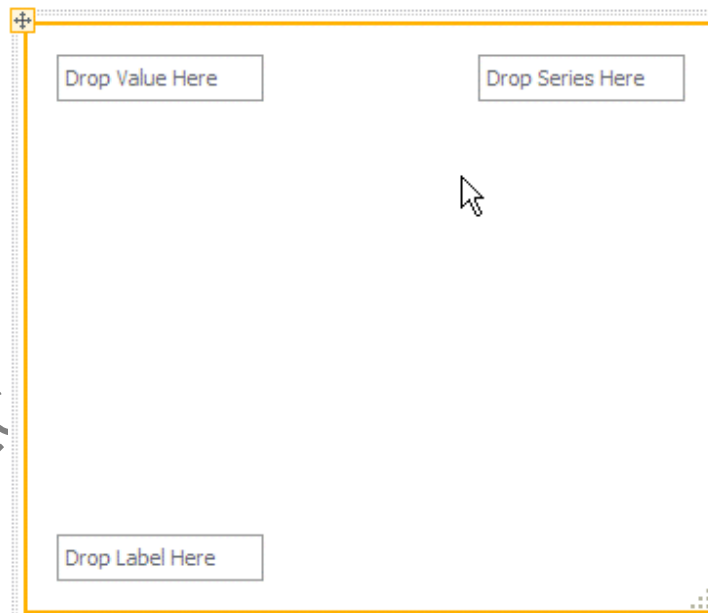
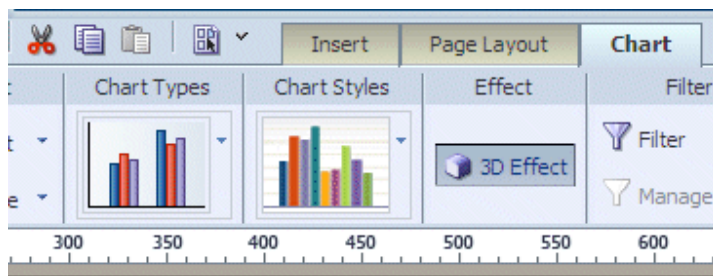


Working with Charts

5. Select the first cell in the first row of the grid layout, and click **Chart** from the **Insert** menu in the ribbon.

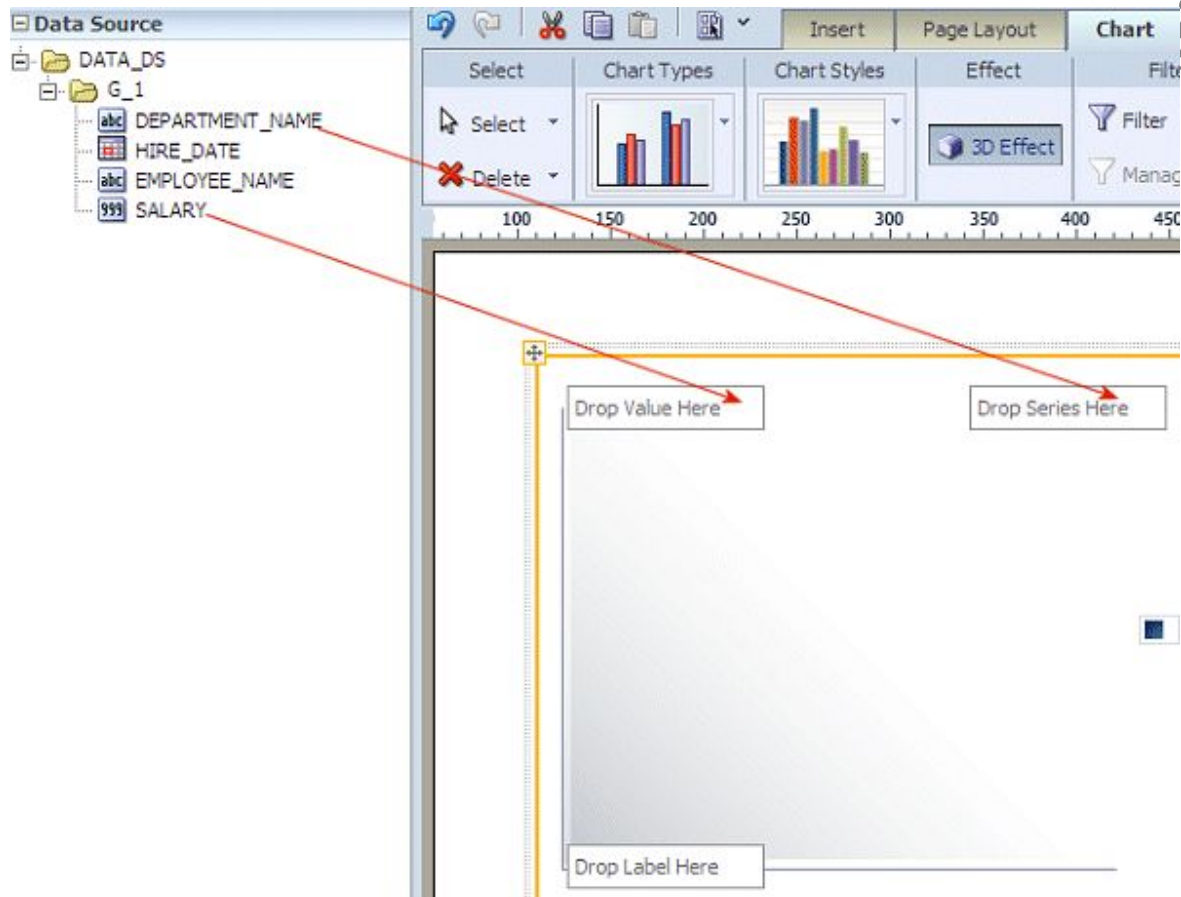


This action inserts a chart template with prompts as shown below:

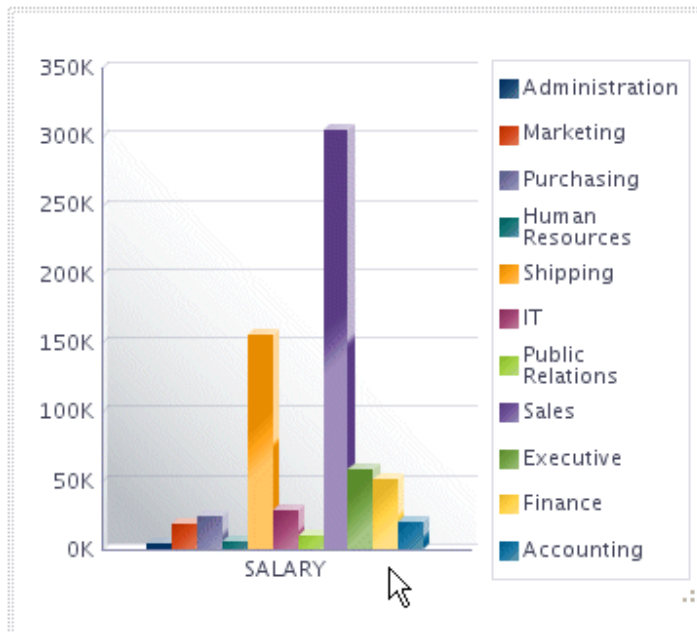


6 . From the **Data Source** pane on the left-

Select and drag the **SALARY** element to the **Drop Value Here** prompt in the empty chart
Next, select and drag the **DEPARTMENT_NAME** element to the **Drop Series Here** prompt.

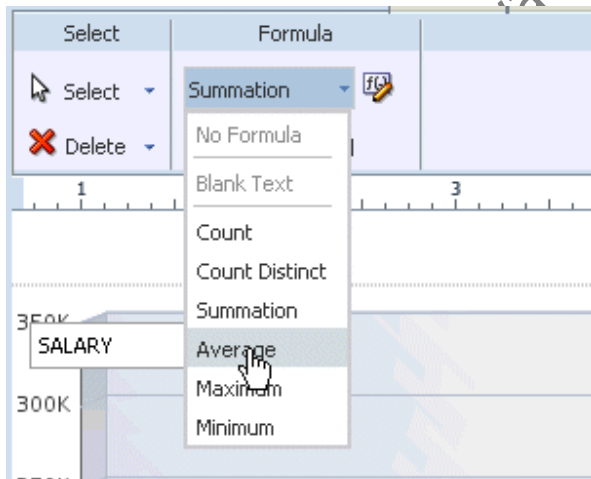


This would populate the chart with some sample data.

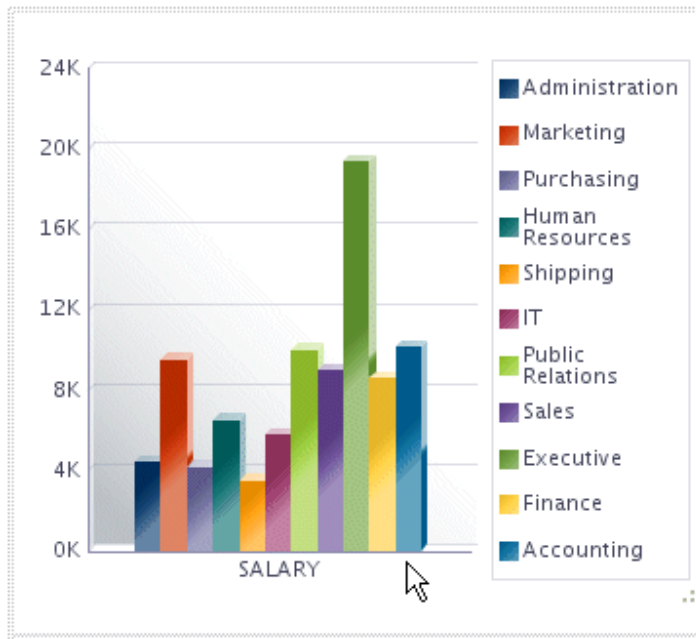


7 . Next, change the **Properties** of the **SALARY** element in the chart to average the value.

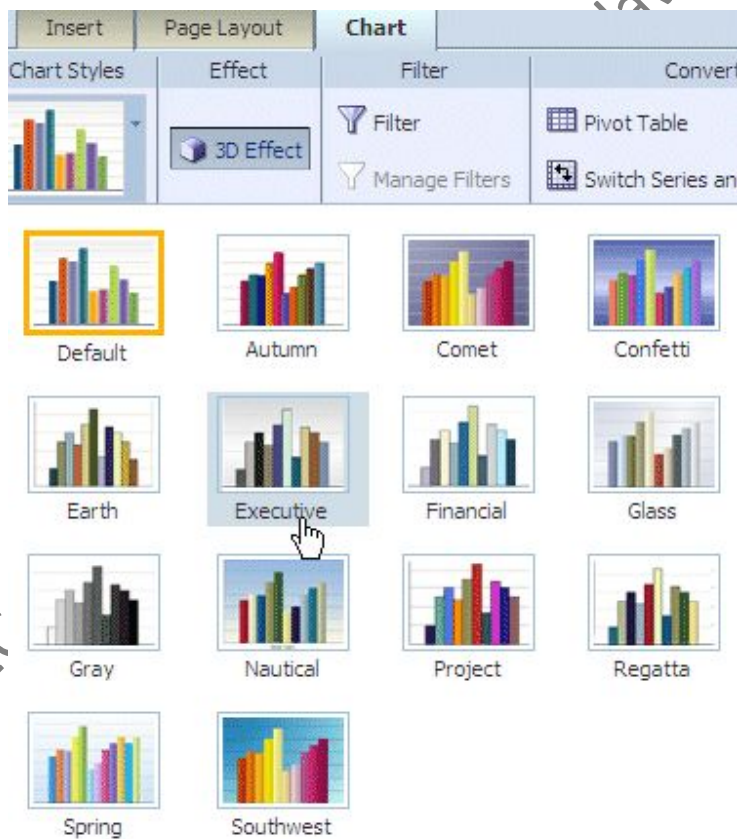
To do this, first select the **SALARY** item in the chart, then click the drop-down menu next to Summation under Formula, and select **Average** from the drop-down menu.



The chart changes to reflect the average salaries by department.

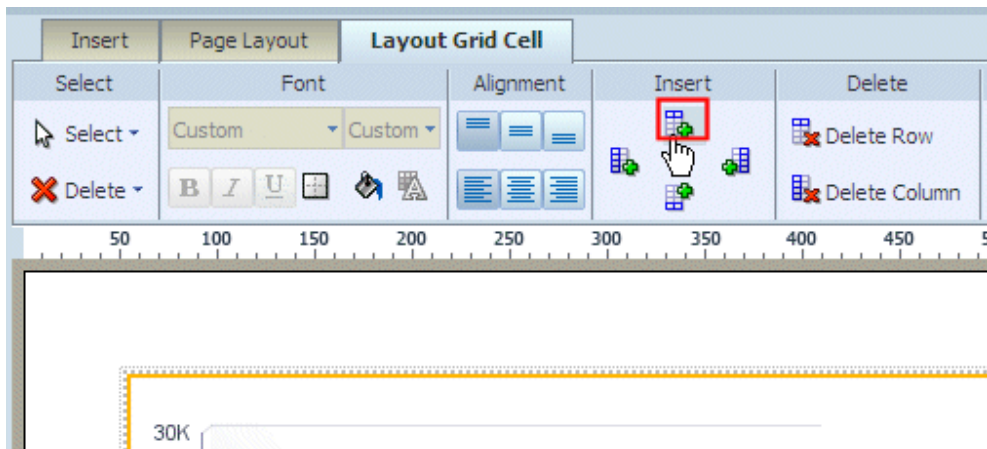


You can leave the default style for the chart or select from the supported chart styles.

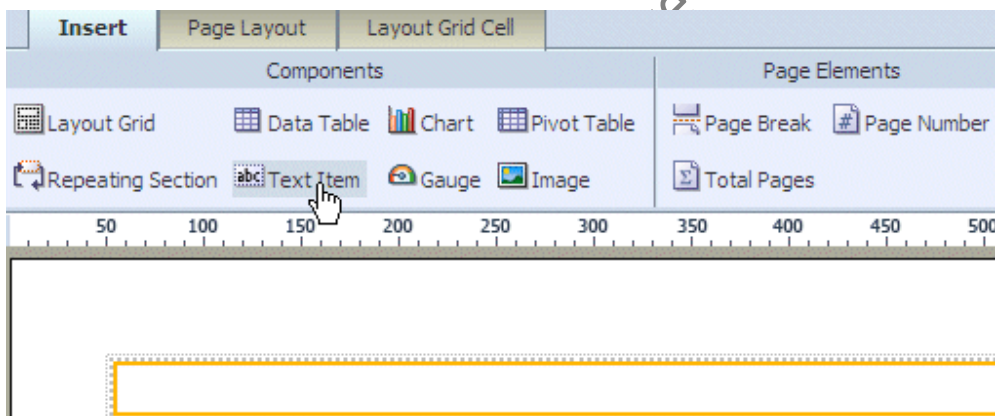


To add a title for the chart, first, Add a row above this chart in the grid layout. Select any of the the grid cells in the first

row, and click the **Add a Row Above** icon.



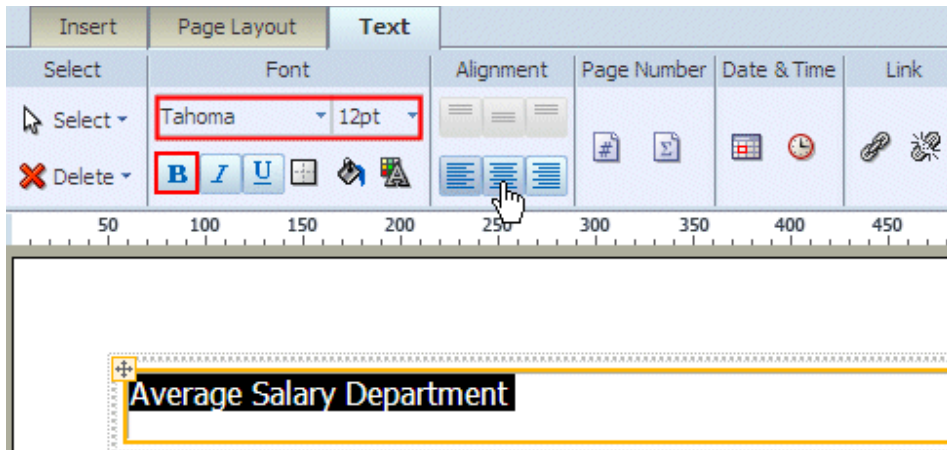
Now select the cell right above the chart, and click **Insert tab** , and then Click **Text Item**.



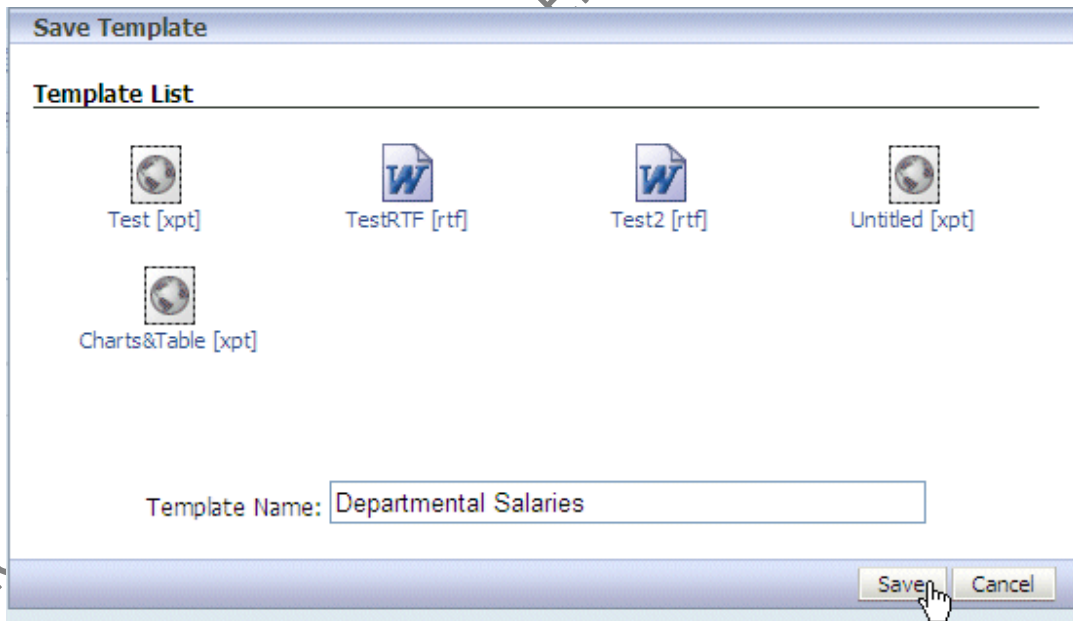
8 . Next, add a title for the chart.

Double-click the text item to select it, then click again to edit it.

Delete the default text and type **Average Salary by Department** as the Title.
Select the text and choose **Tahoma** as font, **12** as the font size, and **Bold** as the style.
Center the title by clicking the **Center Alignment** icon.



9 .Click **Save As** icon in the toolbar, and save the Layout as **Departmental Salaries**.

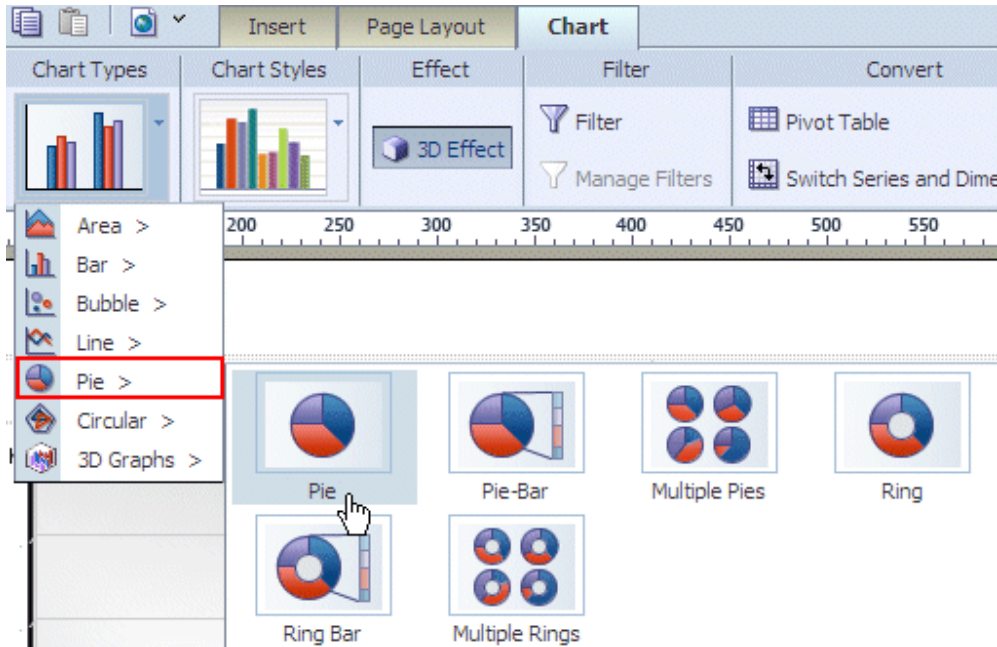


10 Return to complete the layout in the Layout Editor.

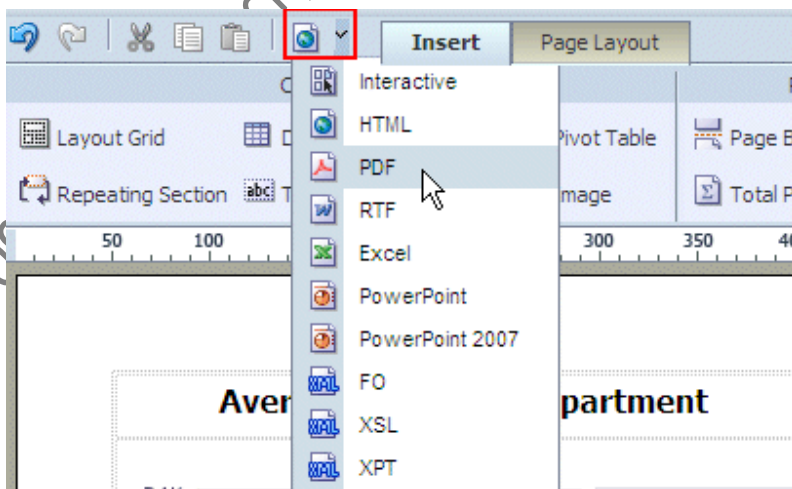
Now, select the cell beside the bar chart that you have inserted. Follow the above steps to insert a **Pie chart**.

The steps are briefly listed here:

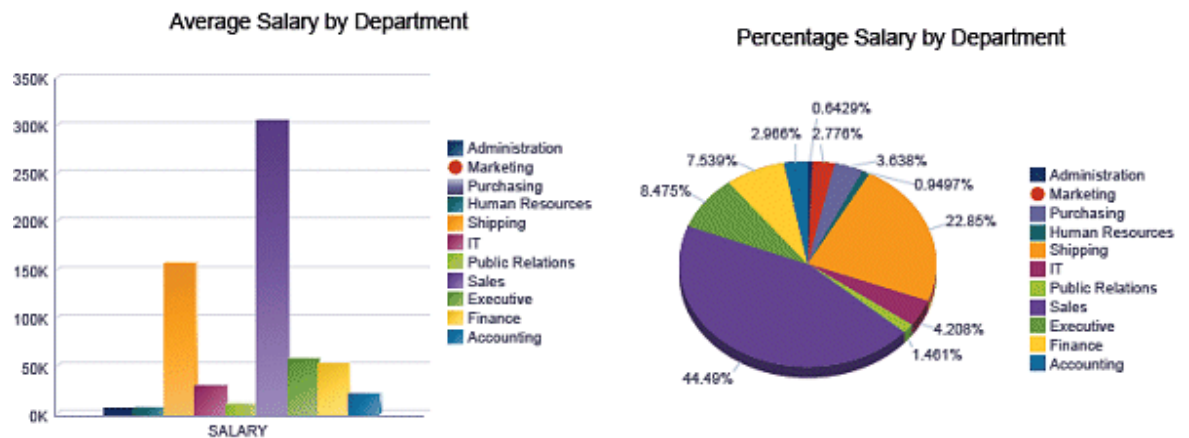
1. Select the cell beside the chart that you have inserted, and then click the **Insert** tab. Click **Chart**.
2. To change the chart type to a pie chart, expand the **Chart Types** menu.
3. Select the **Pie** chart to insert an empty pie chart with prompts in the grid cell.



4. To populate your pie chart: From the **Data Source** pane, select and drag SALARY to **Drop Value Here**, and select and drag DEPARTMENT_NAME to **Drop Series Here**
5. Add **Percentage Salary by Department** as the Title.
6. Use **Tahoma** as the font, **12** as the size, and **Bold** as the style. Align the title in the center.
7. Click **Preview** icon, and select **PDF** from the drop down list to preview your chart :



The preview should now look like this:

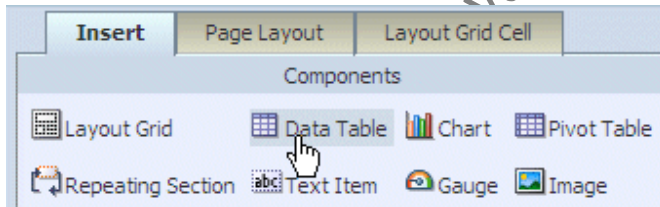


Click **Save** icon in the toolbar to save the changes to the **Departmental Salaries** layout.

Adding a Data Table to the Layout

1. Select the lower row (which has the cells merged).

Click **Insert** tab. Click **Data Table** to insert the data table component into the layout.



2. Select and drag the elements in the following order from the **Data Source** pane to the [Drop a Data Item Here] area of the table:

DEPARTMENT_NAME
EMP_NAME
HIRE DATE
SALARY

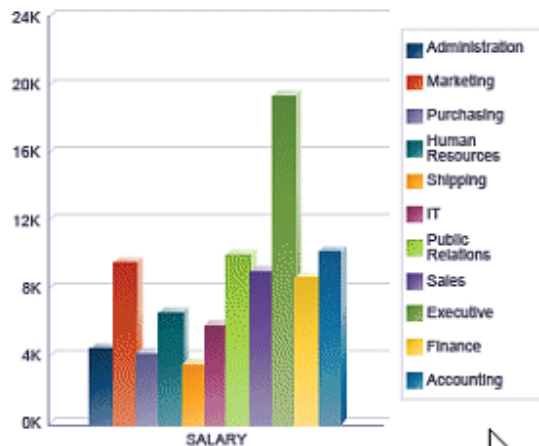
As you drag an element, position each successive item directly to the right of the previous element and release to create each column.

After you insert all the columns notice that a Grand Total row is automatically inserted .

DEPARTMENT NAME	EMPLOYEE NAME	HIRE DATE	SALARY
Administration	Jennifer Whalen	1987-09-17T00:00:00.000+05:30	4400
Marketing	Michael Hartstein	1996-02-17T00:00:00.000+05:30	13000
Marketing	Pat Fay	1997-08-17T00:00:00.000+05:30	6000
Purchasing	Den Raphaely	1994-12-07T00:00:00.000+05:30	11000
Purchasing	Karen Colmenares	1999-08-10T00:00:00.000+05:30	2500
Purchasing	Alexander Khoo	1995-05-18T00:00:00.000+05:30	3100
Purchasing	Shelli Baida	1997-12-24T00:00:00.000+05:30	2900
Purchasing	Sigal Tobias	1997-07-24T00:00:00.000+05:30	2800
Purchasing	Guy Himuro	1998-11-15T00:00:00.000+05:30	2600
Human Resources	Susan Mavris	1994-06-07T00:00:00.000+05:30	6500
			684400

3 . Click **Preview in PDF** icon in the toolbar to preview the layout -

Average Salary by Department



Percentage Salary by Department



DEPARTMENT NAME	EMPLOYEE NAME	HIRE DATE	SALARY
Administration	Jennifer Whalen	1987-09-17T00:00:00.000-07:00	4400
Marketing	Michael Hartstein	1996-02-17T00:00:00.000-08:00	13000
Marketing	Pat Fay	1997-08-17T00:00:00.000-07:00	6000
Purchasing	Den Raphaely	1994-12-07T00:00:00.000-08:00	11000
Purchasing	Alexander Khoo	1995-05-18T00:00:00.000-07:00	3100
Purchasing	Shelli Baida	1997-12-24T00:00:00.000-08:00	2900
Purchasing	Sigal Tobias	1997-07-24T00:00:00.000-07:00	2800
Purchasing	Guy Himuro	1998-11-15T00:00:00.000-08:00	2800
Purchasing	Karen Colmenares	1999-08-10T00:00:00.000-07:00	2500
Human Resources	Susan Mavris	1994-06-07T00:00:00.000-07:00	6500

Click **Save** to save the **Departmental Salaries** layout.

Note: You can edit the layout that is saved in one of the following ways:

1. Click **Actions** and select **Edit Layout** in the view mode of the report or
2. Open the report in **Edit mode** (click **Edit** link below the report in catalog page) and select the layout to be edited in the **Layout** section, and click **Edit** (pencil icon)

Formatting the Data, and Working with the Page Layout Features

Layout Editor enables you perform many formatting tasks such as -

- Change the back ground, text colors, and other text attributes
- Apply number formats
- Define groups/totals/ subtotals, and sorts

- Apply conditional formats
- Define page layout using headers, footers and page breaks.

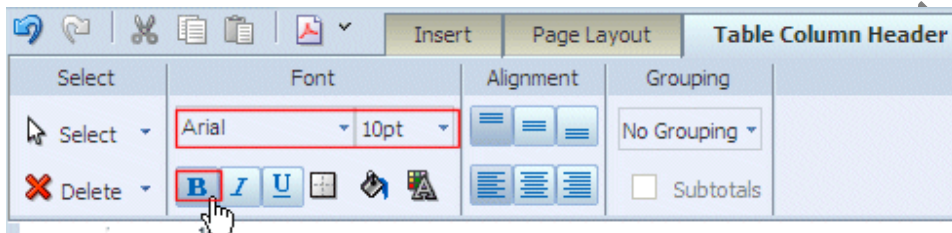
Note: Most of the above formatting tasks can be done using the options in the menu ribbons. The most commonly used formatting properties are found in the context sensitive menu ribbons on the tool bar. For more fine grained properties, you can use the property pane on the left.

1 . Changing Background, Text colors, and other Attributes :

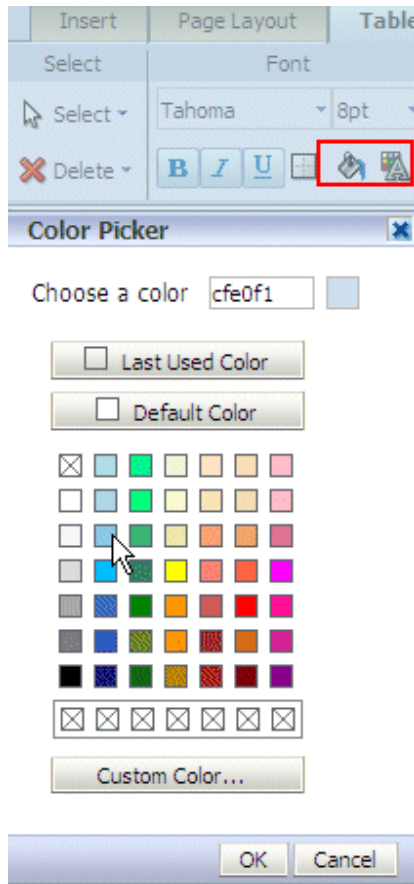
In the table select a column header, for example **DEPARTMENT NAME**.

From the menu ribbon, change the properties as below:

Font to **Arial**, **Font Size** to 10, and **Font Weight** to **Bold**.



- 2 . Click **Background Color** icon from the properties listed in the **Appearance** section. Select a color (light blue is selected in the example here) from the **Color Picker** screen and click **OK**.



Similarly, click the Font color icon (highlighted in the screen) to change the text color for this column header. Select a color (like Dark blue) from the **Color Picker**.

Change the background and text colors for all the column headers in-line with the DEPARTMENT_NAME.

Hint: Use the <CTRL> and <SHIFT> keys to select the remaining columns headers, and change the background and text colors to the same colors you used for the **DEPARTMENT NAME** column header. Similarly, select the column footers (totals) and change the colors .

Note that the Properties pane (on the left) changes accordingly:

Properties

Font

Color

Font Family Arial

Font Size 10pt

Font Style Normal

Font Weight Bold

Text Decoration None

Appearance

Background Color

Border Bottom 1px solid #777777

Border Left 1px solid #777777

Border Right 1px solid #777777

Border Top 1px solid #777777

Padding 2px 4px 2px 4px

Text Alignment Left

Vertical Alignment Top

Misc

Label

Similarly, apply same formats as above to the footer row (Totals row).

- 3 . Change the all the column (data cells) fonts to **Arial** with size **10**.

Click **Save** to to save the **Departmental Salaries** layout.

The table should appear like this after the above formatting changes:

DEPARTMENT NAME	EMPLOYEE NAME	HIRE DATE	SALARY
Administration	Jennifer Whalen	1987-09-17T00:00:00.000+05:30	4400
Marketing	Michael Hartstein	1996-02-17T00:00:00.000+05:30	13000
Marketing	Pat Fay	1997-08-17T00:00:00.000+05:30	6000
Purchasing	Den Raphaely	1994-12-07T00:00:00.000+05:30	11000
Purchasing	Karen Colmenares	1999-08-10T00:00:00.000+05:30	2500
Purchasing	Alexander Khoo	1995-05-18T00:00:00.000+05:30	3100
Purchasing	Shelli Baida	1997-12-24T00:00:00.000+05:30	2900
Purchasing	Sigal Tobias	1997-07-24T00:00:00.000+05:30	2800
Purchasing	Guy Himuro	1998-11-15T00:00:00.000+05:30	2600
Human Resources	Susan Mavris	1994-06-07T00:00:00.000+05:30	6500
			684400

You can also modify the other properties such as Text Alignment. Ensure that the data in the numeric columns - such as SALARY is justified to the right .

- 4 . Adding Number Formats:

You can add appropriate formats to the numeric or date columns such as SALARY, YEAR, HIRE DATE etc. To change the format for SALARY, click anywhere below the column header in the data area to select SALARY column. From the **Data Formatting** drop down list, that is displayed in the ribbon, select **\$1,234.57 (Currency)** as the format.

HIRE DATE	SALARY
17T00:00:00.000+05:30	\$4,400.00
17T00:00:00.000+05:30	\$13,000.00
17T00:00:00.000+05:30	\$6,000.00
07T00:00:00.000+05:30	\$11,000.00
10T00:00:00.000+05:30	\$2,500.00
18T00:00:00.000+05:30	\$3,100.00
24T00:00:00.000+05:30	\$2,900.00

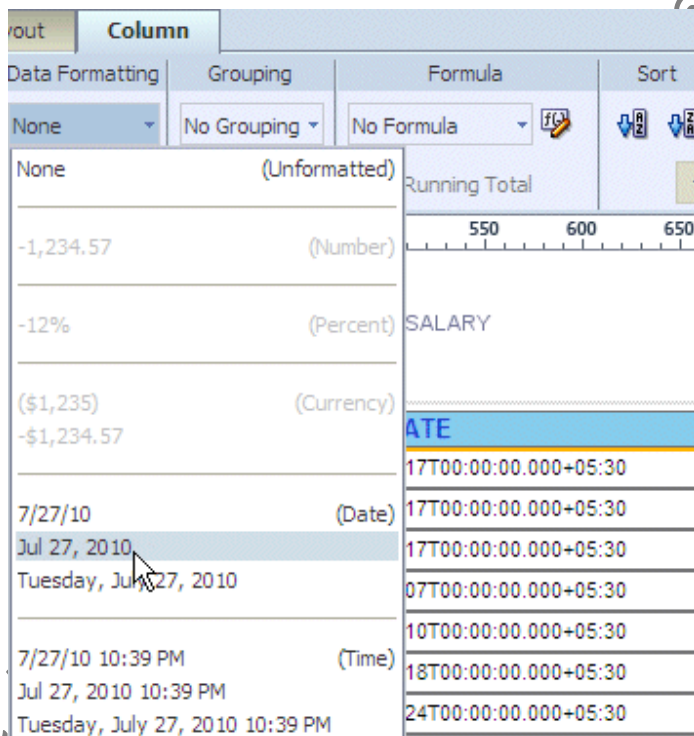
Similarly, select the same format for the Salary Total (last row). Click Save icon to save the changes to the Layout.

Now, adjust the decimal places to the right. Click **Move Right** twice to remove the decimals in Salary column and the Totals.

The table should now look like this (observe the formats for Salary column):

DEPARTMENT NAME	EMPLOYEE NAME	HIRE DATE	SALARY
Administration	Jennifer Whalen	1987-09-17T00:00:00.000+05:30	\$4,400
Marketing	Michael Hartstein	1996-02-17T00:00:00.000+05:30	\$13,000
Marketing	Pat Fay	1997-08-17T00:00:00.000+05:30	\$6,000
Purchasing	Den Raphaely	1994-12-07T00:00:00.000+05:30	\$11,000
Purchasing	Karen Colmenares	1999-08-10T00:00:00.000+05:30	\$2,500
Purchasing	Alexander Khoo	1995-05-18T00:00:00.000+05:30	\$3,100
Purchasing	Shelli Baida	1997-12-24T00:00:00.000+05:30	\$2,900
Purchasing	Sigal Tobias	1997-07-24T00:00:00.000+05:30	\$2,800
Purchasing	Guy Himuro	1998-11-15T00:00:00.000+05:30	\$2,600
Human Resources	Susan Mavris	1994-06-07T00:00:00.000+05:30	\$6,500
			\$684,400

5. Similarly, click HIRE DATE column and apply the appropriate date formats:



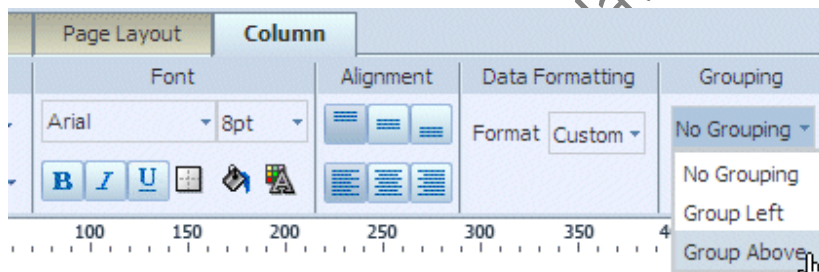
The table looks like this:

DEPARTMENT NAME	EMPLOYEE NAME	HIRE DATE	SALARY
Administration	Jennifer Whalen	Sep 16, 1987	\$4,400
Marketing	Michael Hartstein	Feb 16, 1996	\$13,000
Marketing	Pat Fay	Aug 16, 1997	\$6,000
Purchasing	Den Raphaely	Dec 6, 1994	\$11,000
Purchasing	Karen Colmenares	Aug 9, 1999	\$2,500
Purchasing	Alexander Khoo	May 17, 1995	\$3,100
Purchasing	Shelli Baida	Dec 23, 1997	\$2,900
Purchasing	Sigal Tobias	Jul 23, 1997	\$2,800
Purchasing	Guy Himuro	Nov 14, 1998	\$2,600
Human Resources	Susan Mavris	Jun 6, 1994	\$6,500
			\$684,400

6 . Defining Groups/Totals, and Sorts:

In the table you can add groups, totals, and sorts.

Click the data in the **DEPARTMENT NAME** column to select the same, and select **Group Above** from the **Grouping** drop-down list that appears in the **Column** menu.



The screenshot shows the 'Column' menu with the 'Grouping' dropdown set to 'Group Above'. The menu options are: No Grouping, No Grouping, Group Left, and Group Above. Below the menu, a table is shown with the 'DEPARTMENT NAME' column highlighted in blue. The table data is as follows:

DEPARTMENT NAME	EMPLOYEE NAME	HIRE DATE
Purchasing	Den Raphaely	Dec 6, 1994
Purchasing	Alexander Khoo	May 17, 1995
Purchasing	Shelli Baida	Dec 23, 1997
Purchasing	Sigal Tobias	Jul 23, 1997
Purchasing	Guy Himuro	Nov 14, 1998
Purchasing	Karen Colmenares	Aug 9, 1999
Grand Total		

Note: Instead of using menu options, you can also drag DEPARTMENT NAME out of the table and drop it just above the table to add a repeating group.

A total for the grouped column is automatically added at the end of the group in the table:

Change the font, style, background and text colors as appropriate for DEPARTMENT NAME from the menu options in the ribbon.

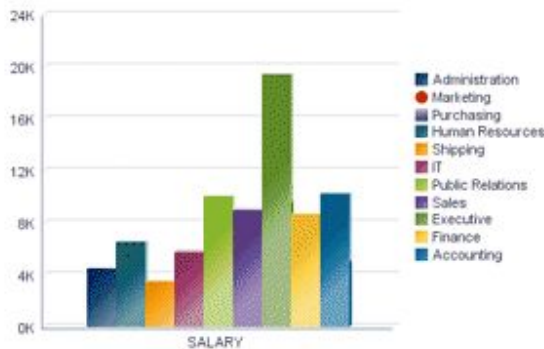
The table should appear like this after you defined a group on DEPARTMENT NAME column, and applied appropriate formats:

▼ Start Grouping - DEPARTMENT_NAME		
DEPARTMENT NAME	DEPARTMENT NAME	
EMPLOYEE NAME	HIRE DATE	SALARY
Den Raphaely	Dec 06, 1994	\$11,000
Alexander Khoo	May 17, 1995	\$3,100
Shelli Baida	Dec 23, 1997	\$2,900
Sigal Tobias	Jul 23, 1997	\$2,800
Guy Himuro	Nov 14, 1998	\$2,600
Karen Colmenares	Aug 09, 1999	\$2,500
	Grand Total	\$24,900
End Grouping - DEPARTMENT_NAME		

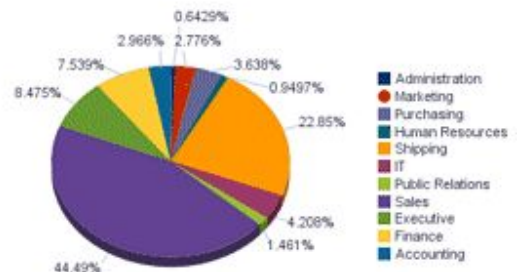
Note: Every time you make changes, do not forget to click **Save** and save the changes to the template.

- 7 . Click Preview in HTML icon to see the data in HTML

Average Salary by Department



Percentage Salary by Department



DEPARTMENT NAME	Administration	
EMPLOYEE NAME	HIRE DATE	SALARY
Jennifer Whalen	Sep 16, 1987	\$4,400
	Grand Total	\$4,400

Scroll down to see the table:

DEPARTMENT NAME **Administration**

EMPLOYEE NAME	HIRE DATE	SALARY
Jennifer Whalen	Sep 16, 1987	\$4,400
	Grand Total	\$4,400

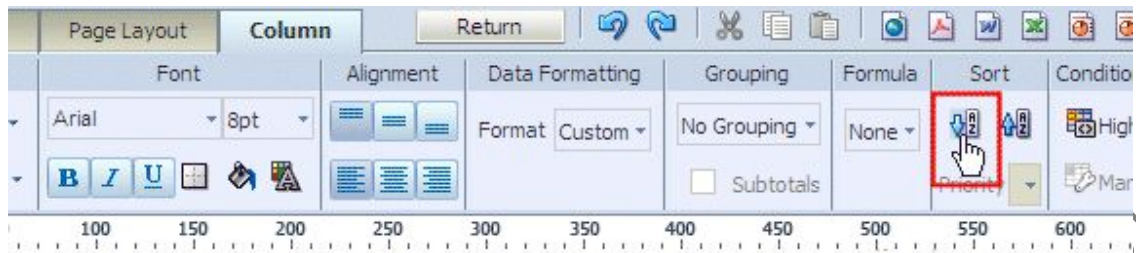
DEPARTMENT NAME **Marketing**

EMPLOYEE NAME	HIRE DATE	SALARY
Michael Hartstein	Feb 16, 1996	\$13,000
Pat Fay	Aug 16, 1997	\$6,000
	Grand Total	\$19,000

DEPARTMENT NAME **Purchasing**

EMPLOYEE NAME	HIRE DATE	SALARY
Den Raphaely	Dec 06, 1994	\$11,000
Karen Colmenares	Aug 09, 1999	\$2,500
Alexander Khoo	May 17, 1995	\$3,100
Shelli Baida	Dec 23, 1997	\$2,900
Sigal Tobias	Jul 23, 1997	\$2,800
Guy Himuro	Nov 14, 1998	\$2,600
	Grand Total	\$24,900

- 8 . You can also define sorts on the columns in the table. You can define an ascending or descending sorts on columns. Select the data in **EMPLOYEE NAME** column and click **Ascending Order** (A-Z) icon in the **Sort** menu. The products are arranged in alphabetical order.



▼ Start Grouping - DEPARTMENT NAME

DEPARTMENT NAME	DEPARTMENT NAME
EMPLOYEE NAME	SALARY
Den Raphaely	\$11,000
Alexander Khoo	\$3,100
Shelli Baida	\$2,900
Sigal Tobias	\$2,800
Guy Himuro	\$2,600
Karen Colmenares	\$2,500
Grand Total	\$24,900

A portion of the data table, the data for the Purchasing department is shown below, note that the data is sorted by Employee Name:

DEPARTMENT NAME	Purchasing
EMPLOYEE NAME	SALARY
Alexander Khoo	\$3,100
Den Raphaely	\$11,000
Guy Himuro	\$2,600
Karen Colmenares	\$2,500
Shelli Baida	\$2,900
Sigal Tobias	\$2,800
Grand Total	\$24,900

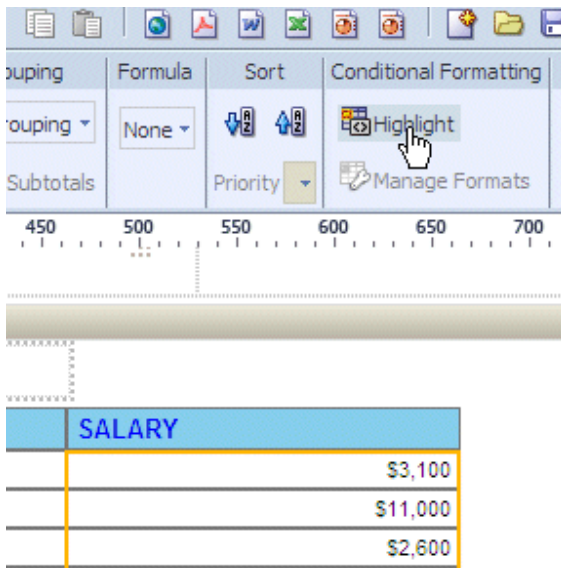
(You can also sort by salary, in which case a numeric sort is applied as appropriate.)

9. Applying Conditional Formats:

Conditional formats help you to highlight the data in fields based on a condition. For example, you may want to do a pay revision to reduce attrition rates, and may want to see which employees are earning very good salaries, and which employees are not earning so well (say less than 3000 USD).

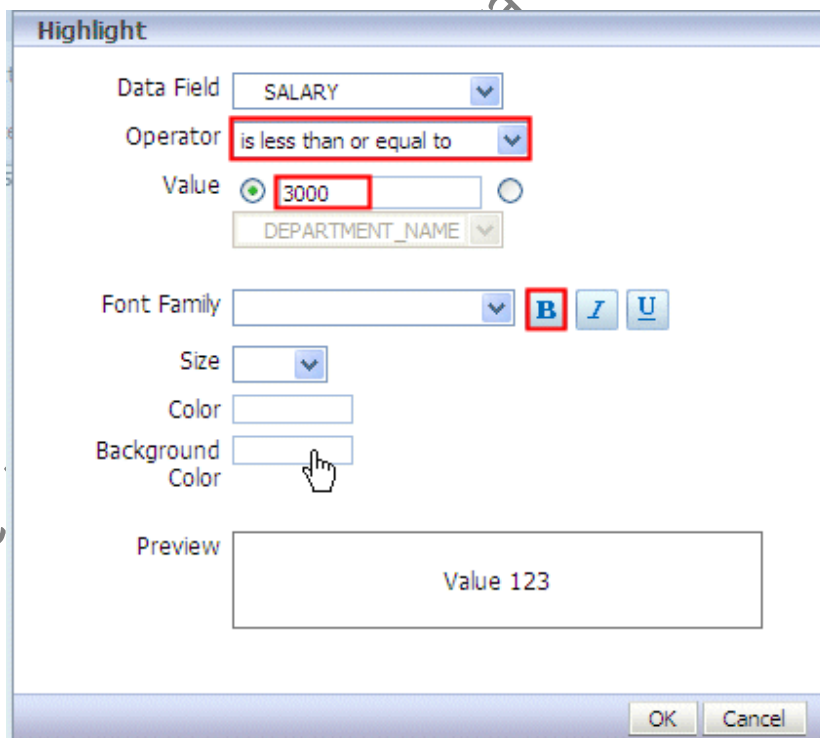
To apply simple conditional formats on **SALARY** select the data in the column and from the **Conditional Formatting**

menu, click **Highlight**.

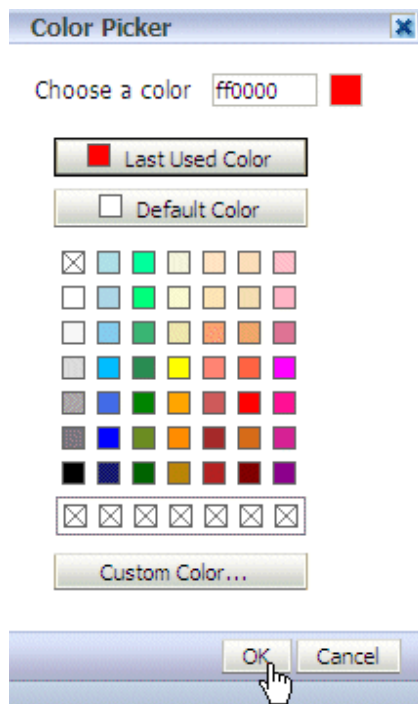


10. In the Highlight screen that appears, select **is less than or equal to** from the **Operator** drop-down list. Enter **3000** as the Value. Set **Bold** as the Text style.

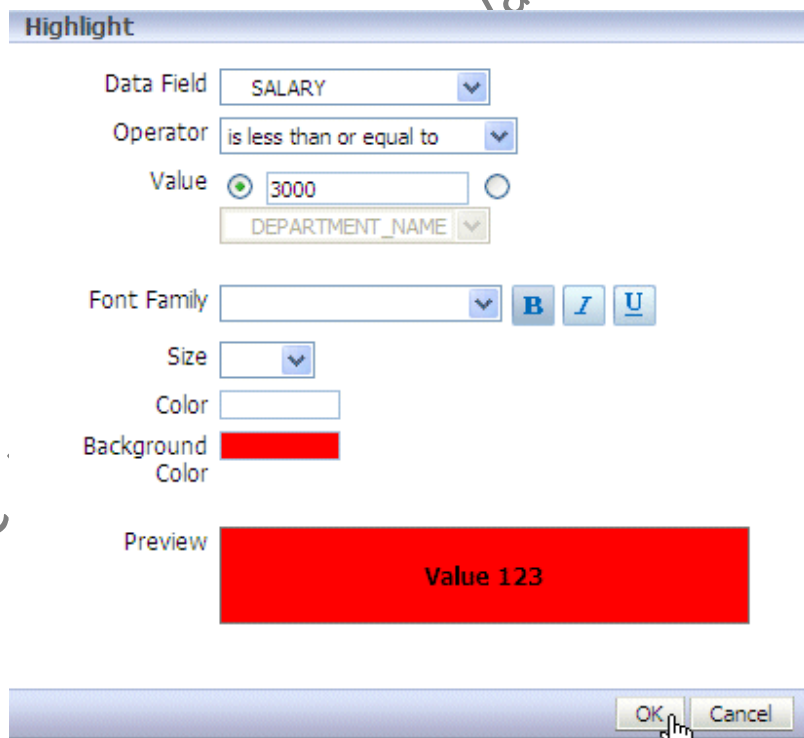
Click the box beside the Background Color field.



In the Color Picker, select Red as the background color. Click **OK**.

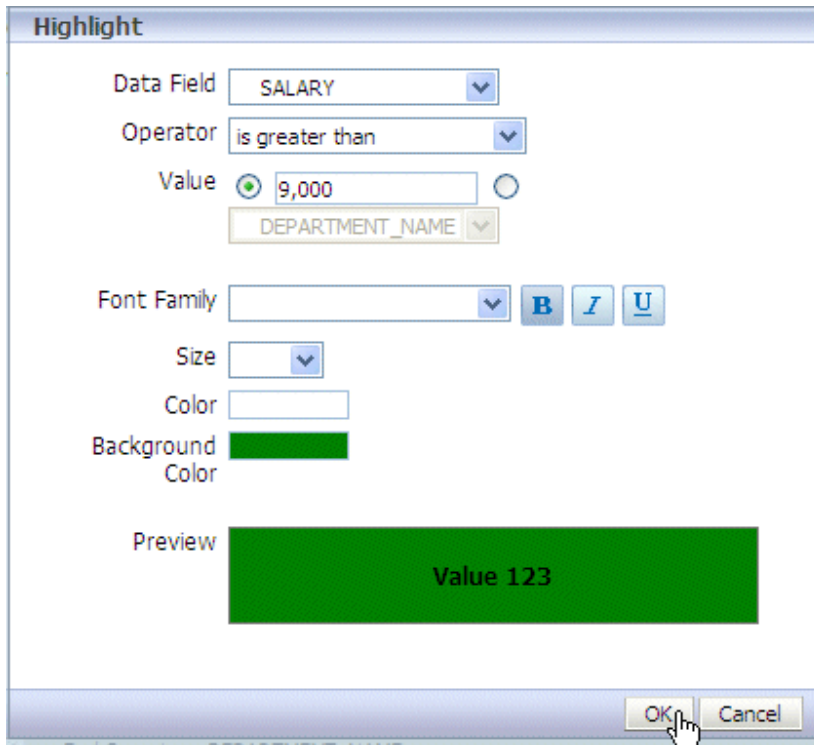


This takes you back to the **Highlight** definition dialog, preview how conditional format looks like and click **OK**.



11 . Define two more conditional formats as given below:

1. One with the Operator - **is greater than**, and enter the **Value** as **9000**. Apply **Green** as the back ground color, and set **Bold** as font style. (See the screens below).
Click OK.



The screenshot shows the 'Highlight' dialog box in Microsoft Excel. The 'Data Field' is set to 'SALARY'. The 'Operator' is 'is greater than'. The 'Value' is '9,000'. The 'Background Color' is set to green. The 'Preview' shows a green box with the text 'Value 123'. The 'OK' button is highlighted.

2. Also define a conditional format with the Operator - **is between**, and enter the Values as **3000** and **5000**. Apply **yellow** as the background color, and **Bold** as font style. (See the screen below).
Click OK.

Highlight

Data Field

Operator

Value ☒ ☐

and

☒ ☐

Font Family **B** *I* U

Size

Color

Background

Color

Preview

Value 123

Click **Save** icon to save the **Departmental Salaries** template.

- 12 . Click **Preview in HTML** icon to see the data in HTML (a portion of the table data is shown below, note that all the three conditional formats that you defined are applied on the SALARY column) .

DEPARTMENT NAME **Administration**

EMPLOYEE NAME	HIRE DATE	SALARY
Jennifer Whalen	Sep 16, 1987	\$4,400
Grand Total		\$4,400

DEPARTMENT NAME **Marketing**

EMPLOYEE NAME	HIRE DATE	SALARY
Michael Hartstein	Feb 16, 1996	\$13,000
Pat Fay	Aug 16, 1997	\$6,000
Grand Total		\$19,000

DEPARTMENT NAME **Purchasing**

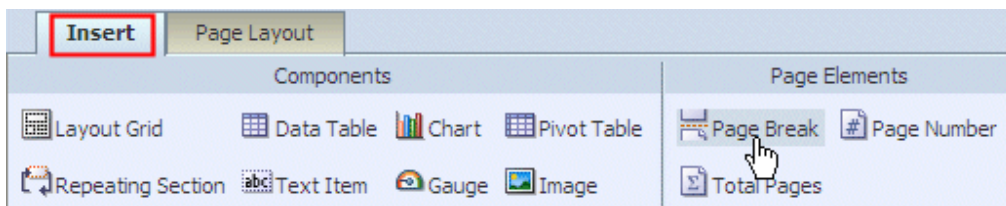
EMPLOYEE NAME	HIRE DATE	SALARY
Alexander Khoo	May 17, 1995	\$3,100
Den Raphaely	Dec 06, 1994	\$11,000
Guy Himuro	Nov 14, 1998	\$2,600
Karen Colmenares	Aug 09, 1999	\$2,500
Shelli Baida	Dec 23, 1997	\$2,900
Sigal Tobias	Jul 23, 1997	\$2,800
Grand Total		\$24,900

Note: Some of the salient features of Layout Editor that are helpful in creating report templates are briefly covered here. If you have time, try experimenting with other components , and other features such as section, pivot table, gauges, images, and Group Left with subtotals.

13 . Working with Page Layout Features:

In the layout that you have created with the report components such as charts and table, you may want to add page breaks after each component, and in the table after each year. The next few steps guide you to add page breaks, headers , and/or footers to the report layout.

In the grid layout , select the second row which has charts. Click **Insert**, and select **Page Break** from the **Page Elements** section in the menu.



Similarly, add a page break in the next row before the end of the section for **DEPARTMENT NAME** (group). Click inside the table just before the end of the section.

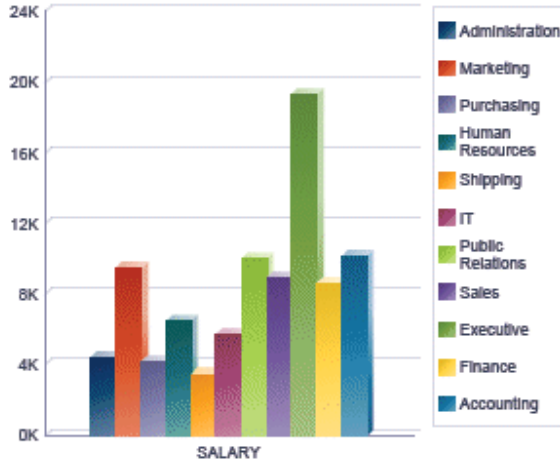
Select **Insert > Page break** from the **Page Elements** section in the menu. (This inserts a page break after each department data in the table.)

▼ Start Grouping - DEPARTMENT_NAME		
DEPARTMENT NAME	DEPARTMENT NAME	
EMPLOYEE NAME	HIRE DATE	SALARY
Adam Fripp	Apr 9, 1997	\$8,200
Alana Walsh	Apr 23, 1998	\$3,100
Alberto Errazuriz	Mar 9, 1997	\$12,000
Alexander Hunold	Jan 2, 1990	\$9,000
Alexander Khoo	May 17, 1995	\$3,100
Alexis Bull	Feb 19, 1997	\$4,100
Allan McEwen	Jul 31, 1996	\$9,000
Alyssa Hutton	Mar 18, 1997	\$8,800
Amit Banda	Apr 20, 2000	\$6,200
Anthony Cabrio	Feb 6, 1999	\$3,000
		\$684,400
End Grouping - DEPARTMENT_NAME		

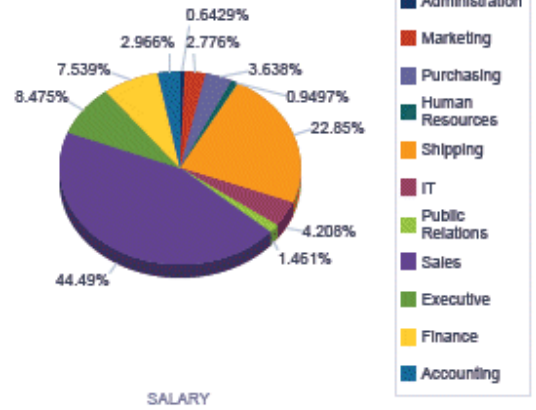
14 . To see if the page breaks are inserted at right places, preview the layout in PDF. Click **Preview in PDF** icon.

Notice the page breaks in the PDF file:

Average Salary by Department



Percentage Salary by Department



DEPARTMENT NAME

Administration

EMPLOYEE NAME	HIRE DATE	SALARY
Jennifer Whalen	Sep 16, 1987	\$4,400
		\$4,400

Scroll down to see the second page. Note that a page break is inserted after each department data:

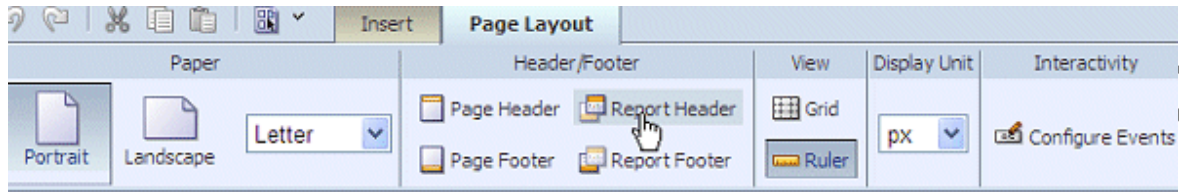


DEPARTMENT NAME

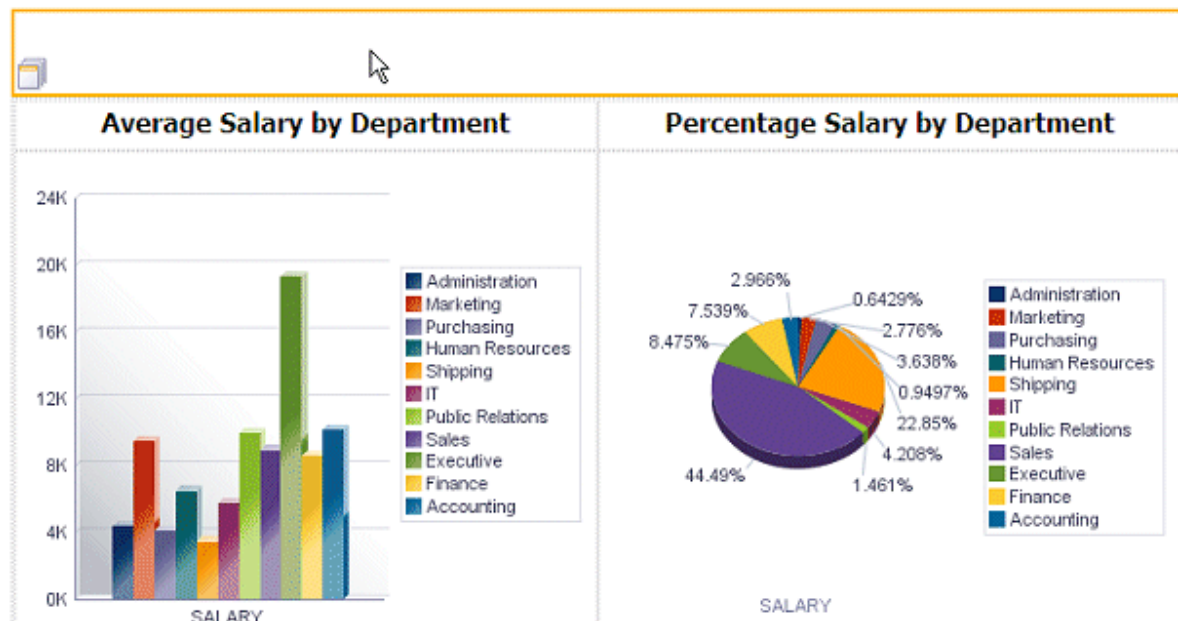
Marketing

EMPLOYEE NAME	HIRE DATE	SALARY
Michael Hartstein	Feb 16, 1996	\$13,000
Pat Fay	Aug 16, 1997	\$6,000
		\$19,000

- 15 . To insert page/report header and footers, click **Page Layout**. This displays all the menu options for Page Layout in the ribbon. Click **Report Header**.

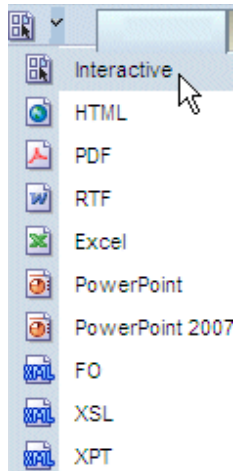


A report header (place holder) is inserted into the layout.



Insert a Text Item in the header, and double click the text item to edit it. Enter **Employee Salary Analysis by Department** as the report header. Apply appropriate formats for the report header.

Preview the output in Interactive viewer.

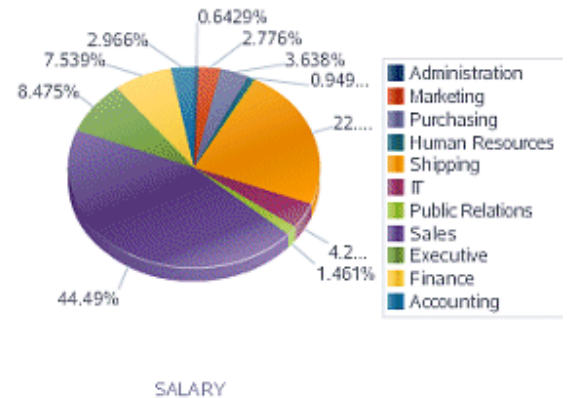


Employee Salary Analysis by Department

Average Salary by Department



Percentage Salary by Department



DEPARTMENT NAME		DEPARTMENT_NAME
		Accounting
EMPLOYEE NAME	HIRE DATE	
Shelley Higgins	Jun 6, 1994	
William Gietz	Jun 6, 1994	

Observe that you can interactively select a department to view the data.

Also, when you click the interactive 'v' shaped icon for each column you can see the MS Excel like, interactive filtering and sorting features.

DEPARTMENT_NAME		Accounting
EMPLOYEE NAME	HIRE DATE	SALARY
Shelley H.	Jun 6, 1994	\$12,000
William Gi.	Jun 6, 1994	\$8,300
		\$20,300

Page 1 of 1 Confidential Sep 02, 2010 22:12 PM

16 . Similarly click **Page Footer** to insert a footer in the layout. An icon for the page footer at the end of the grid.

Insert elements such as page numbers, simple text, time and date into these columns. An example is given here:

1. First, select the page footer, and insert a Grid of a single row with 3 columns. Insert text items into each of these columns.
2. Edit the first column in the Grid in the page footer item so that the text is in the format - " <page no> of <total no. of pages>".
3. Double click this text item in the first column, and click **Page Number** icon from the **Text** menu in the ribbon
4. Beside the page number icon that is inserted into the Page Header, type "of "
5. Now, click **Page Total** icon from the **Text** menu.
6. Similarly, insert simple Text such as "Confidential" in the second Grid column, and Date and Time in the third column of the footer.

The footer should look like this:

Page 1 of 1	Confidential	
-------------	--------------	--

The report with the headers and footers defined should look like this in PDF:

Employee Salary Analysis by Department

Average Salary by Department



Percentage Salary by Department



DEPARTMENT NAME

Administration

EMPLOYEE NAME	HIRE DATE	SALARY
Jennifer Whalen	Sep 16, 1987	\$4,400
		\$4,400

DEPARTMENT NAME

Marketing

EMPLOYEE NAME	HIRE DATE	SALARY
Michael Hartstein	Feb 16, 1996	\$13,000
Pat Fay	Aug 16, 1997	\$6,000
		\$19,000

DEPARTMENT NAME

Purchasing

EMPLOYEE NAME	HIRE DATE	SALARY
Alexander Khoo	May 17, 1995	\$3,100
Den Raphaely	Dec 6, 1994	\$11,000
Guy Himuro	Nov 14, 1998	\$2,600
Karen Colmenares	Aug 9, 1999	\$2,500
Shelli Baida	Dec 23, 1997	\$2,900
Sigal Tobias	Jul 23, 1997	\$2,800
		\$24,900

Note: If you have time, you can experiment with various elements such as gauges, images etc.

Scheduling a Report

This topic guides you through the following subtopics:

- Confirming that the scheduler is configured
- Defining Delivery Destinations
- Creating Scheduled Report Jobs
- Managing Job History and Jobs

[Confirming that the Scheduler is Configured](#)

[Defining Delivery Destinations](#)

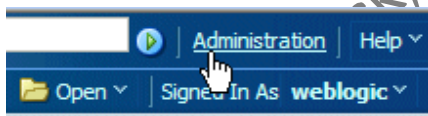
[Creating Scheduled Report Jobs](#)

[Managing Job History and Jobs](#)

Confirming that the Scheduler is Configured

Oracle BI Publisher Enterprise enables you to schedule reports, and deliver the executed output to various destinations. BI Publisher Scheduler is configured as a part of Oracle BI Enterprise Edition installation process. However, ensure that the scheduler is configured properly, before you start scheduling the reports.

- 1 Log in (if not logged in) to **BI Publisher (Web)** as a user with BI Administrator privileges.
• Click **Administration** link (found at the right top corner of the BI Publisher page):



In the **Administration** page, click the **Scheduler Configuration** link in the **System Maintenance** section



2 In the **Scheduler Configuration** page that appears, click **Test Connection** in the Database Connection section to check if the scheduler is configured properly.

The screenshot shows the Oracle BI Publisher Enterprise Administration interface. The top navigation bar includes 'Administration', 'Home', 'Catalog', 'New', 'Open', and 'Signed In As weblogic'. The main content area is titled 'System Maintenance' and contains three tabs: 'Server Configuration', 'Scheduler Configuration' (selected), and 'Scheduler Diagnostics'. Below the tabs are 'Apply' and 'Cancel' buttons. The 'Scheduler Configuration' section has a 'Scheduler Selection' area with a 'Scheduler' dropdown set to 'Quartz' and a 'Quartz Clustering' checkbox. Below this is the 'Database Connection' section, which includes a 'Database Connection Type' dropdown set to 'jndi' and a 'JNDI Name' text field containing 'jdbc/bip_datasource'. At the bottom of this section are 'Test Connection' and 'Install Schema' buttons. A mouse cursor is pointing at the 'Test Connection' button. The 'JMS Configuration' section is partially visible at the bottom.

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

The screenshot shows a confirmation message in the Oracle BI Publisher Enterprise Administration interface. The message is titled 'Confirmation' and states 'Connection established successfully.' Below the message is a 'System Maintenance' link. A mouse cursor is pointing at the 'System Maintenance' link.

Now, you are ready to schedule your reports.

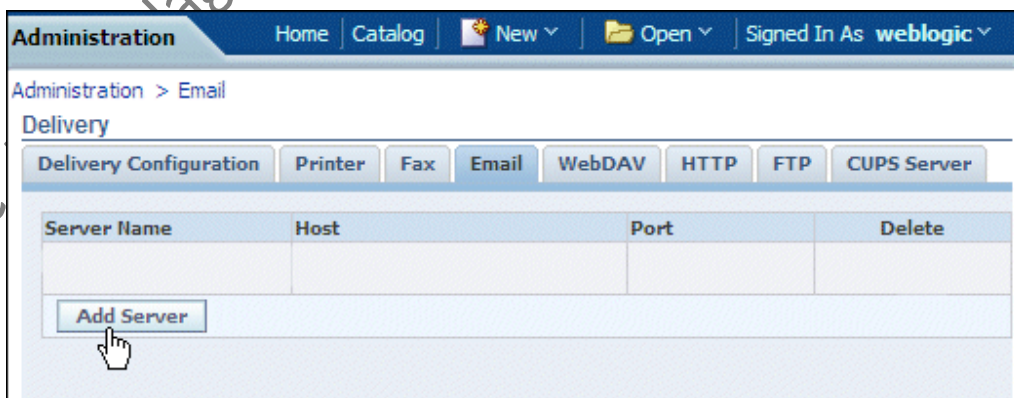
Defining Delivery Destinations

Oracle BI Publisher enables you to setup different delivery destinations such as - Email, Printer, Fax, WebDAV, HTTP, and other destinations, so that you can deliver your reports to these destinations. This topic guides you how to set up your Email and WebDAV destinations using BI Publisher Administration page.

1. In the BI Publisher **Administration** page, (you need to login to BI Publisher with BI Administrator privileges to access this page) you see a list of destinations in the **Delivery** section.
Click **Email** link in the **Delivery** section.



2. In the Email configuration page that appears, Click **Add Server**.



3. In the Add Server page that appears,

Enter an appropriate name for the mail server in the **Server Name** field

Enter the Email server in the **Host** field

Enter the values in the following fields if applicable—

- › General field: Port
- › Security fields: User Name and Password

Click **Apply**.

The screenshot shows the 'Add Server' page in the Administration console. The page has a navigation bar at the top with 'Home', 'Catalog', 'New', 'Open', and 'Signed In As weblogic'. Below the navigation bar, the breadcrumb 'Administration > Email > Add Server' is displayed. The main content area is titled 'Add Server' and contains two tabs: 'General' and 'Security'. The 'General' tab is active and shows three input fields: '* Server Name' with the value 'Oracle Mail', '* Host' with the value 'mail.oracle.com', and 'Port' with the value '25'. The 'Security' tab is also visible and shows two input fields: 'Username' and 'Password'. There are 'Apply' and 'Cancel' buttons at the top right of the form.

Important Note: You must enter a unique name for each server regardless of the type (printer, fax, email, WebDAV, or FTP).

4. Similarly, you can add a WebDAV server as one of the delivery destinations. Click **WebDAV** link in the Administration page, and click **Add Server**.

Enter An Appropriate name in the **Server Name** field, and **Host** for the WebDAV server

Enter the following fields if applicable—

- › General fields: Port
- › Security fields: Authentication Type (None, Basic, Digest) and Encryption Type (None, SSL).
- › Proxy Server fields: Host, Port, User Name, Password, Authentication Type (None, Basic, Digest)

Administration > WebDAV > Add Server

Add Server

Apply Cancel

General

* Server Name * Host

Port

Security

Username Password

Authentication Type Encryption Type

Proxy Server

Host Port

Username Password

Authentication Type

Creating Scheduled Report Jobs

1. Login (If not logged in) to BI Publisher and go to My Folders> Learn folder in Catalog.

Click **Schedule** link found under the **Employee Salaries by Department** report.

Location

Employee Salaries by Department | Last Modified 6/25/10 11:26 AM | Modified By weblogic | Created By weblogic
Open | Schedule | Jobs | Job History | Edit | More▼

Test1 | Last Modified 6/25/10 3:03 AM | Date Created 6/25/10 3:03 AM | Created By weblogic
Open | Schedule | Jobs | Job History | Edit | More▼

Emp_DM | Last Modified 6/25/10 11:24 AM | Date Created 6/25/10 11:24 AM | Created By weblogic
Open | Schedule | Jobs | Job History | Edit | More▼

Note: If you do not see the Schedule link it is likely that you do not have Scheduler privileges or that the Scheduler is not configured properly.

2. This displays the **Schedule Report Job** page.

In the **General** tabbed page, you can select report name and parameter values (select **All** as the value for the Department report parameter).

Schedule Report Job Home Catalog New

Overview

General Created by weblogic Outputs Output1

Report Name /~weblogic/Learn/Employee Salaries by Department.xdo Destination

Schedule Start immediately Notification

General Output Schedule Notification

Report /~weblogic/Learn/Employee Salaries by D

Parameters

Department: All

- All
- Administration
- Marketing
- Purchasing
- Human Resources
- Shipping
- IT
- Public Relations
- Sales
- Executive
- Finance
- Accounting
- Treasury
- Corporate Tax
- Control And Credit

3. Click **Output** tab to define the output options. Ensure that "Use Bursting Definition to Determine Output& Delivery Destination" check box is **not** selected.

Select the following options:

- Enter **DeptSal** as the Name, Select **Departmental Salaries** from the Layout drop-down list, and select an appropriate output format as **PDF**
- Accept default values for locale, calendar, and select an Appropriate time zone from the drop-down list
- Ensure that the **Save Output** check box is selected

Name	Layout	Format	Locale	Timezone	Calendar	Save
DeptSal	DepartmentalSalaries	PDF	English (United States)	[GMT +05:30] India Standard Time	Gregorian	<input checked="" type="checkbox"/>

4. Also, ensure that the **Make Output Public** option is not selected (if you select this option, all users can see the output of your scheduled report) , and **Save Data for Republishing** option is selected (so that you can later republish the report with a different layout and output types).

You can also add a delivery destination for the scheduled report. In the Destination Section, select **Email** as the **Destination Type** and click **Add Destination**.

☐ Make Output Public
☒ Save Data for Republishing

Name	Layout	Format	Locale
DeptSal	Departmental Salaries	PDF	English (United States)

Destination

There are five destination types: Email, Printer, Fax, FTP and Web folder. You can add multiple destinations as you need.

Destination Type: Email

This shows an Email section below the Destination section. Add the mail ids in the To, CC, and Reply To fields as required, add a Subject to the mail, and type the message.

Destination

There are five destination types: Email, Printer, Fax, FTP and Web folder. You can add multiple destinations as you need.

Destination Type

Email		Output <input type="text" value="All"/>
To	<input type="text" value="user1@oracle.com"/>	Message Hi, Attached pls find the employee salary report department...
Cc	<input type="text"/>	
Reply to	<input type="text" value="me@oracle.com"/>	
Subject	<input type="text" value="Employee Salary Report"/>	

Note:

For adding destinations for scheduled reports, you should have first configured them in the Administration page.

You can define multiple outputs for a single scheduled job and deliver each to separate destinations. For example, you might want to deliver a PDF output as an attachment to an email to a list of managers. You might also want to deliver the Excel output of the same report to a content management server (via WebDAV) at the same time.

- 5 . Click **Schedule** tab to define the scheduling options.

Select **Run Now** option to run the job immediately. Select the **Frequency** as **Once** from the drop-down list.

Overview
General Created by weblogic
Report Name /~weblogic/Learn/EmpSalRep.xdo
Schedule Start immediately
Outputs Output1
Destination
Notification

Define Schedule Time
Frequency
Run Now ☒

You can also add Email Notification options, (as you have already defined Email delivery destination).

The screenshot shows the 'Notification' tab of a configuration window. It has four sub-tabs: 'General', 'Output', 'Schedule', and 'Notification'. The 'Notification' tab is active. It contains two main sections for notification methods: 'Email' and 'HTTP'. The 'Email' section is selected with a checked checkbox. It includes an 'Email Address' field with the value 'mymail@oracle.com'. Below it, there are three 'When' options: 'Report completed' (unchecked), 'Report completed with warnings' (unchecked), and 'Report failed' (checked). The 'HTTP' section is unselected. It includes an 'HTTP Server' dropdown menu set to 'HTTPServer', and 'User Name' and 'Password' text boxes. Below these, there are three 'When' options: 'Report completed' (unchecked), 'Report completed with warnings' (unchecked), and 'Report failed' (unchecked).

Click **Submit** to submit the schedule.

- 6 . Enter **Employee Salaries by Department-Sched** as the Job Name and click Submit again.

The screenshot shows a 'Submit Job' dialog box. It has a title bar with 'Submit Job' and standard window controls. The main area contains the following text: 'Report /~weblogic/Learn/Employee Salaries By Department.xdo', 'Parameters P_DNAME:*', 'Schedule Start immediately', 'Output DeptSal', and 'Notification'. At the bottom, there is a 'Report Job Name' field with the value 'Employee Salaries by Department-Sched'. Below this field are three buttons: 'Help', 'Submit', and 'Cancel'. A mouse cursor is pointing at the 'Submit' button.

A message is displayed indicating that the job is submitted successfully. Click OK.



7 . Scheduling a Report Job to run Weekly:

Follow the steps 1 – 3 listed above to create this job. In step 4, click **Schedule** tab, and select the following options—

Select **Weekly** from the Frequency drop-down list

Ensure that you have entered option to run the report Every week

Select Monday to run the report on every Monday

In the Start and End fields enter the start and end dates for the report, and make sure that the time is 8 am

A screenshot of the 'Schedule' tab in a software interface. The tab is selected among 'General', 'Output', 'Schedule', and 'Notification'. Below the tabs, there is a section titled 'Define Schedule Time'. Under this section, the 'Frequency' is set to 'Weekly' in a dropdown menu. Below that, it says 'Every 1 week(s)'. Then, there is a list of days with checkboxes: 'Monday' (checked), 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday'. At the bottom, there are two text boxes: 'Start' with the value 'Oct 11, 2010 8:00:00 AM' and 'End' with the value 'Oct 25, 2010 8:00:00 AM'.

Click Submit to submit the job, and after specifying a name for the job click Submit again.

Select some of the different Frequency patterns available for scheduling the jobs. Note that the **Specific Dates** option allows you to create a completely custom pattern to meet whatever calendar requirements you have.

General Output **Schedule** Notification

Define Schedule Time

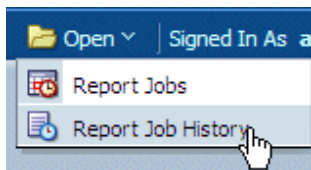
Frequency: Once (dropdown menu open showing: Once, Hourly/Minute, Daily, Weekly, Monthly, Annually, Specific Dates)

Run Now

Start: 4:46:33 PM

Managing Job History and Jobs

1 Click **Open** (found at the top right corner of the page) and select **Report Job History**.



The **Report Job History** page displays information about running and completed report jobs. You can see the report job that you created in the list as shown in the screen below. (Note that the job status indicates success). Click the job name link (Employee Salaries by Department -Sched) .

Report Job History Home | Catalog | New | Open | Signed In As weblogic

last Refreshed Wed Jun 30, 2010 08:47:54 AM Pacific Standard Time

Time Zone used for filters and display [GMT-11:00] Midway Island, Samoa

Filters

Report Job Name Contains Start Processing Equals Or Later Jun 23, 2010 8:47:48 AM

Report Path Contains End Processing Equals Or Earlier

Status All

Search Reset

Report Job Histories

[4 Total Report Output]						
Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
Employee Salaries by Department-Sched	Employee Salaries by Department.xdo	Success	06-30-2010 08:26:40 AM	06-30-2010 08:26:43 AM	weblogic	Private
Sched-TestJob	Employee Salaries by Department.xdo	Success	06-30-2010 03:19:16 AM	06-30-2010 03:19:19 AM	weblogic	Private
EmpSalRep-Sched	EmpSalRep.xdo	Success	06-29-2010 06:08:12 AM	06-29-2010 06:08:15 AM	weblogic	Private
Testing with Salary	Draft - Jun 26 2010 2-45-03 AM.xdo	Success	06-28-2010 03:42:19 PM	06-28-2010 03:42:23 PM	weblogic	Private

You can also enter appropriate Search criteria to search for reports or search for the job history for a specific report. Observe the various search criteria that you can use.

2 General job information and other job execution details are displayed for the specific report. Click **DeptSal** (in the Output . Name column) , to see the scheduled report output using the Departmental Salaries layout that you created.

Report Job History Home Catalog New Open Signed In As weblog

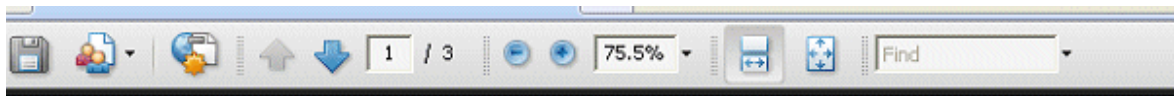
General Information		Report Job Execution Information	
Report Job ID	1054	Report Job Status	
Report Job Name	Employee Salaries by Department-Sched	Start Processing Time	6/30/10 8:26:40 AM PDT
Owner	weblogic	End Processing Time	6/30/10 8:26:43 AM PDT
Report Name	Employee Salaries by Department	Time Elapsed	3.346 Seconds
Report Scope	Private		
Report Job Schedule	6/30/10 8:26:38 AM PDT		
Active Start Date	6/30/10 8:26:38 AM PDT		
Active End Date			

No parameters available

Output & Delivery

XML Data Republish

Status	Output Name	Template	Format	Locale	Time Zone	Cale...	Sta...	Send
All	DeptSal	Departmental Salaries	PDF	English (United States)	[GMT-11:00] Midway Island, Samoa	Greg...		



Average Salary by Department



Percentage Salary by Department

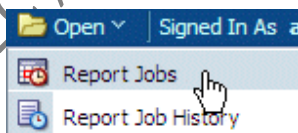


DEPARTMENT NAME	EMPLOYEE NAME	HIRE DATE	SALARY
Administration	Jennifer Whalen	1987-09-17T00:00:00.000-07:00	4400
Marketing	Michael Hartstein	1998-02-17T00:00:00.000-08:00	13000
Marketing	Pat Fay	1997-08-17T00:00:00.000-07:00	6000
Purchasing	Den Raphaely	1994-12-07T00:00:00.000-08:00	11000
Purchasing	Alexander Khoo	1995-05-18T00:00:00.000-07:00	3100
Purchasing	Shelli Baida	1997-12-24T00:00:00.000-08:00	2900
Purchasing	Sigal Tobias	1997-07-24T00:00:00.000-07:00	2800
Purchasing	Guy Himuro	1998-11-15T00:00:00.000-08:00	2600
Purchasing	Karen Colmenares	1999-08-10T00:00:00.000-07:00	2500

Click **Return** in BI Publisher.

Note: You can also click the **Republish** option to republish the scheduled job with a different layout and output options.

3 Similarly, click **Report Jobs** to see the **Manage Report Jobs** page. This page displays information about jobs that are scheduled for future dates, and also recurring report jobs. You can pause, resume, edit, or delete report jobs from this page.



Manage Report Jobs
Home | Catalog | New | Open | Signed In As weblogic

Last Refreshed Wed Oct 13, 2010 12:30:03 AM Eastern European Time

Select time zone to view jobs [GMT-08:00] Pacific Time (US & Canada)

Filters

Report Job Name Contains Start Time Equals Or Later Than
Report Name Contains End Time Equals Or Earlier Than
Status All
Search Reset

Report Jobs

Report Job Name	Report Name	Status
MySalRep-Weekly	/~weblogic/Learn/Employee Salaries By Departm...	Active
EmpSalRep-Sched-Daily	/~weblogic/Learn/Employee Salaries By Departm...	Active
Quarterly Income Statement	/6. Published Reporting/Executive/Quarterly I...	Active

4 Click in the column beside a job name to select that job .Click **Pause** to suspend the job. (Observe that the job status . changes to Paused.)

Last Refreshed Wed Oct 13, 2010 12:43:52 AM Eastern European Time

Select time zone to view jobs [GMT-08:00] Pacific Time (US & Canada)

Filters

Report Job Name Contains Start Time Equals Or Later Than

Report Name Contains End Time Equals Or Earlier Than

Status All

Search Reset

Report Jobs

Report Job Name	Report Name	Status
MySalRep-Weekly	/~weblogic/Learn/Employee Salaries By Departm...	Active
EmpSalRep-Sched-Daily	/~weblogic/Learn/Employee Salaries By Departm...	Active
Quarterly Income Statement	/6. Published Reporting/Executive/Quarterly I...	Active

If you want to resume the same, click **Resume**. Similarly, click **Delete** if you would like to delete the job.

Manage Report Jobs Home Catalog New Open Signed In

Last Refreshed Wed Oct 13, 2010 12:49:25 AM Eastern European Time

Select time zone to view jobs [GMT-08:00] Pacific Time (US & Canada)

Filters

Report Job Name Contains Start Time Equals Or Later Than

Report Name Contains End Time Equals Or Earlier Than

Status All

Search Reset

Report Jobs

Report Job Name	Report Name	Status
MySalRep-Weekly	/~weblogic/Learn/Employee Salaries By Departm...	Active
EmpSalRep-Sched-Daily	/~weblogic/Learn/Employee Salaries By Departm...	Paused
Quarterly Income Statement	/6. Published Reporting/Executive/Quarterly I...	Active

Summary

In this tutorial, you have learned how to:

- Configure Data Sources
- Create Data Model based on SQL query
- Create and view simple reports
- Build layouts using Layout Editor
- Schedule Report Jobs
- Manage Job History and Jobs

Resources

- To learn more about BI Publisher, refer to additional OBEs on the [OTN](#) Web site (can link to a specific set of OBEs on the subject)

Credits (Optional)

- **Lead Curriculum Developer:** Padmaja Mitravinda K.
- **Technical Contributors/ Reviewers :** Mike Donohue, Nikos Psomas, Pradeep Sharma , Klaus Fabian, Kasturi Shekhar

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