

Oracle® Fusion Middleware

User's Guide for Oracle Business Intelligence Publisher

Release 11g (11.1.1)

Part No. E18861-01

April 2011

Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher, Release 11g (11.1.1)

Part No. E18861-01

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Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher, Release 11g (11.1.1)

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- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

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Preface

Intended Audience

Welcome to Release 11g (11.1.1) of the *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher*.

This book is intended for the following users:

- report consumers who will be viewing and scheduling reports in Oracle BI Publisher

See Related Information Sources on page ix for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/us/corporate/accessibility/>

Structure

- 1 Introduction to Using Oracle Business Intelligence Publisher
- 2 Getting Started
- 3 Viewing a Report
- 4 Creating Report Jobs
- 5 Viewing and Managing Report Jobs
- 6 Viewing and Managing Report History
- 7 Managing Objects in the BI Publisher Catalog

Related Information Sources

For more information, see the following documents in the Oracle Business Intelligence Enterprise Edition 11g Release 1 (11.1.1) documentation set:

- The Oracle Business Intelligence chapter in the *Oracle Fusion Middleware Release Notes* for your platform
- *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*
- *Oracle Fusion Middleware Developer's Guide for Oracle Business Intelligence Publisher*
- *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*
- *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher*
- *Oracle Fusion Middleware Installation Guide for Oracle Business Intelligence*
- *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*

System Requirements and Certification

Refer to the system requirements and certification documentation for information about hardware and software requirements, platforms, databases, and other information. Both of these documents are available on Oracle Technology Network (OTN).

The system requirements document covers information such as hardware and software requirements, minimum disk space and memory requirements, and required system libraries, packages, or patches:

http://www.oracle.com/technology/software/products/ias/files/fusion_requirements.htm

The certification document covers supported installation types, platforms, operating systems, databases, JDKs, and third-party products:

http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle **STRONGLY RECOMMENDS** that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, you

may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

Introduction to Using Oracle Business Intelligence Publisher

Introduction to Oracle Business Intelligence Publisher

Oracle BI Publisher is an enterprise reporting solution for authoring, managing, and delivering all your highly formatted documents, such as operational reports, electronic funds transfer documents, government PDF forms, shipping labels, checks, sales and marketing letters, and much more.

The *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher* describes how report consumers use BI Publisher to view and schedule reports. See these other guides for more information about using the product for other business roles:

Role	Sample Tasks	Guide
Administrator	Configuring Security Configuring System Settings Diagnosing and Monitoring System Processes	<i>Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher</i>
Application developer or integrator	Integrating BI Publisher into existing applications using the application programming interfaces	<i>Oracle Fusion Middleware Developer's Guide for Oracle Business Intelligence Publisher</i>
Data Model developer	Fetching and structuring the data to use in reports	<i>Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher</i>

Role	Sample Tasks	Guide
Report designer	Creating report definitions Designing layouts	<i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i>

Overview for Report Consumers

A report consumer may perform the following tasks:

- Run and view reports in real-time from the BI Publisher catalog
- Schedule reports to run at selected intervals and to various destinations such as printer, fax, or e-mail
- View report history
- Create an ad hoc analysis of report data using BI Publisher's Analyzer feature
- Open and manipulate reports in Microsoft Excel using BI Publisher's Analyzer for Microsoft Excel

The tasks that are available to you will depend on the permission assigned to you by your administrator.

The topics in this book that describe performing report consumer tasks are:

- Browsing the Catalog, page 2-8
- Viewing a Report, page 3-1
- Using the Online Analyzer, page 3-8
- Using the BI Publisher Analyzer for Excel, page 3-14
- Scheduling a Report, page 4-1
- Scheduling a Report To Be Burst, page 4-9
- Managing Your Scheduled Reports, page 5-1
- Viewing Report History and Republishing Reports, page 6-1

New Features for Oracle Business Intelligence Publisher 11g Release 1 (11.1.1)

This preface describes new features in Oracle Business Intelligence Publisher 11g Release 1 (11.1.1). If you are upgrading from a previous release, read the following for information about new features, tools, and procedures.

This section includes the following topics:

- New Features for Oracle BI Publisher 11g Release 1 (11.1.1.5)
- New Features for Oracle BI Publisher 11g Release 1 (11.1.1.3)

New Features for Oracle BI Publisher 11g Release 1 (11.1.1.5)

New features in Oracle BI Publisher 11g Release 1 (11.1.1.5) include:

Access Report History from the Manage Report Jobs Page

The **Manage Report Jobs** page now includes a **History** link for each job to enable you to quickly view the completed runs of a job. For more information, see *About the Manage Report Jobs Page*, page 5-1.

Monitor Running Report Jobs

While a scheduled report job is in running status, you can now monitor the stages of the report processing in the **Report Job History** page. For more information, see *Monitoring Running Jobs*, page 6-6.

Cancel Running Jobs

When a scheduled report job is in running status, you can now cancel the running job from the **Report Job History** page. For more information, see *Canceling a Running Job*, page 6-8.

Excel 2007 Output Type

Excel 2007 is a new output type available for reports. When selected, BI Publisher will generate the output in Excel XML format (.xlsx). If you have Excel 2007 or later installed, this option provides the best preservation of layout and formatting. For more information see *Using the Report Viewer Options*, page 3-2.

New Features for Oracle BI Publisher 11g Release 1 (11.1.1.3)

New features in Oracle BI Publisher 11g Release 1 (11.1.1.3) include:

Major User Interface Improvements

The user interface has undergone major improvements in several areas, including a new Home page and redesigned editors and panes. These improvements are intended to make working with Oracle BI Publisher easier and more consistent. This guide provides detailed information on working with the various pieces of the user interface.

Shared Oracle BI Presentation Catalog

For installations of BI Publisher with the Oracle BI Enterprise Edition, BI Publisher now shares the same catalog with Oracle BI Presentation services.

Interactive Viewer

For reports created with the new BI Publisher layout editor, a new interactive output type is available. The interactive viewer enables pop-up chart details, scrollable tables, table filtering, table sorting, and propagated filtering across different components of the report. This interactivity is achieved simply by designing the report in the layout editor, no additional coding is necessary.

Enhanced Scheduling Options

A single report job can now produce multiple outputs, each with a different layout applied, and each sent to a different destination. The scheduling options have been enhanced to enable more recurrence pattern options.

Getting Started

This chapter covers the following topics:

- Accessing Oracle Business Intelligence Publisher
- Setting My Account Preferences and Viewing My Groups
- About the Home Page
- About the Catalog
- About the Global Header
- Searching the Catalog

Accessing Oracle Business Intelligence Publisher

Logging in with credentials:

1. Navigate to the URL provided by your administrator (for example: <http://example.com:9704/xmlpserver>).

Sign In

Please enter username and password

Username
operations

Password
●●●●●●●

Accessibility Mode

Sign In

Guest

English (United States)

Oracle BI Publisher
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2. Select the language you prefer for the user interface.
3. Enter your credentials to sign in to BI Publisher.
4. Click **Sign In**.

Note: Accessibility Mode renders the catalog in a tree structure for users requiring keyboard navigation.

Logging in as Guest:

If your administrator has enabled guest access, a **Guest** button will display on the log in page.

A guest user does not require credentials and has privileges only to view reports available in the folder set up for guest access.

1. Select the language you prefer for the user interface.
2. Click **Guest**.

To view reports, see *Viewing a Report*, page 3-1.

What's Next

To set user preferences, see *Setting My Account Preferences*, page 2-3.

To view reports, see *Viewing a Report*, page 3-1.

To browse the catalog, see *Browsing the Catalog*, page 2-8.

To schedule reports, see *Creating Report Jobs*, page 4-1.

Setting My Account Preferences and Viewing My Groups

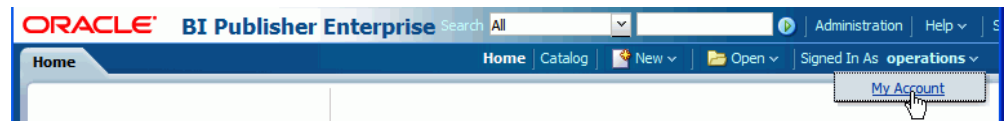
Note: Your preferences may be inherited from another Oracle product. If this is true for your work environment, you cannot update your preferences from within BI Publisher. If you are not sure where to update your preferences, ask your administrator.

Use the **My Account** dialog to:

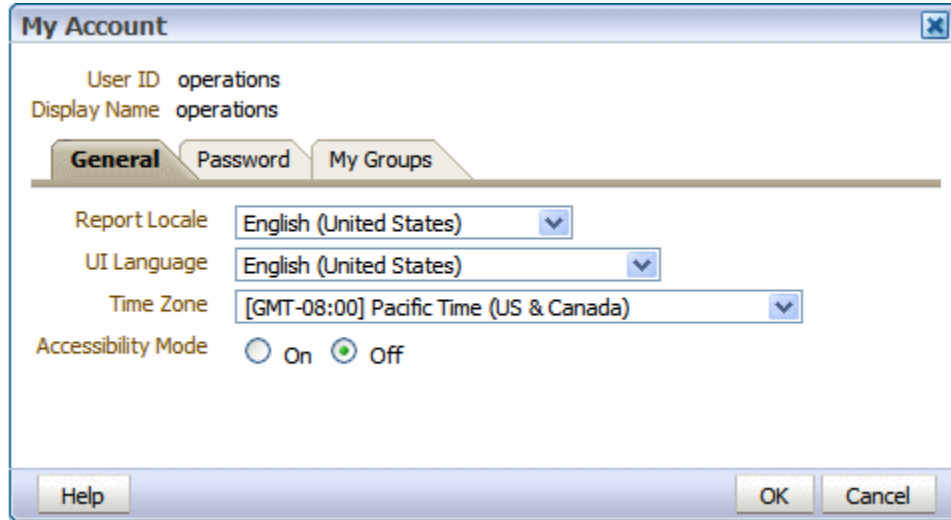
- Set general preferences
- Change your password
- View assigned roles

To Access the My Account dialog:

- In the global header, click your user name displayed after **Signed In As** and then select **My Account** as shown in the following figure:



The **My Account** dialog will display as shown:



To Set General Preferences

Use the **General** tab to set the following:

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 following:

- the translation to apply to a report layout
- the number, date, and currency formatting to apply to the report data

Note that if a particular report does not have a translation for the selected locale, BI Publisher will apply a locale fallback logic to select the most appropriate layout available. For more information, see *Locale Selection Logic, Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

BI Publisher applies localized number, date, and currency formatting independently of the layout translation.

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. Choose from the languages that are available for your installation.

Time Zone

Reports will display the time according to the time zone preference selected here. You can override this setting when creating a scheduled report job (see *Creating Report Jobs*,

page 4-1). Note that the time displayed on the user interface and reflected in report processing times is governed by the BI Publisher server time zone.

Accessibility Mode

Setting this to "On" will display the report catalog in a tree structure that is accessible using keyboard strokes.

To Change Your Password

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

Note: If your account password settings are inherited from another application you will not be able to update your password here.

To View Your User Groups

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

About the Home Page

The Oracle BI Publisher Home page provides an intuitive, task-based entry into Oracle BI Publisher's functionalities. The Home page is divided into sections that enable you to quickly begin a specific task, locate an object, or access documentation. The following figure shows the Home page.



The Home page consists of the following sections:

Create

Provides links to initiate creation tasks, such as create report, create report job and create data model. Click **More** to access options not shown. BI Publisher populates this list based on what permissions or roles you have.

More information on each task, see the document indicated:

Task	More Information
Create Report	Creating or Editing a Report, <i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i>
Create Report Job	Creating Report Jobs, page 4-1
Create Data Model	Using the Data Model Editor, <i>Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher</i>
Create Style Template	Creating and Implementing Style Templates, <i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i>

Task	More Information
Create Subtemplate	Creating and Implementing Subtemplates, <i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i>

Browse/Manage

Provides quick access to the catalog, where you can browse and manage reports and other catalog objects; and to the Report Jobs and the Report Jobs History pages, where you can view and manage scheduled, running, and completed report jobs.

Get Started

This section contains the following links:

- **Download BI Publisher Tools**

This list contains additional products that you may download and install.

- **Template Builder for Word**

This add-in for Microsoft Word facilitates the design of RTF templates. For more information, see *Creating RTF Templates Using the Template Builder for Word, Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

The Template Builder for Excel is included in the Template Builder for Word installation. The Template Builder for Excel is an add-in for Microsoft Excel that enables you to preview Excel Templates. For more information, see *Creating Excel Templates, Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

- **Analyzer for Excel**

This add-in for Microsoft Excel enables you to manipulate the results of a report query in Excel and also to upload a spreadsheet back to BI Publisher to use as a layout. For more information, see *Using the BI Publisher Analyzer for Excel*, page 3-14.

- **Oracle SQL Developer**

Oracle SQL Developer is a free and fully supported graphical tool for database development. With SQL Developer, you can browse database objects, run SQL statements and SQL scripts, and edit and debug PL/SQL statements. You can also run any number of provided reports, as well as create and save your own. SQL Developer enhances productivity and simplifies your database

development tasks.

- **Help Contents**

Opens the Help table of contents.

- **Oracle Technology Network**

Access the Oracle Technology Network (OTN) to search for technical articles about Oracle products, participate in discussions about Oracle products, ask the user community technical questions, and search for and download Oracle products.

Recent

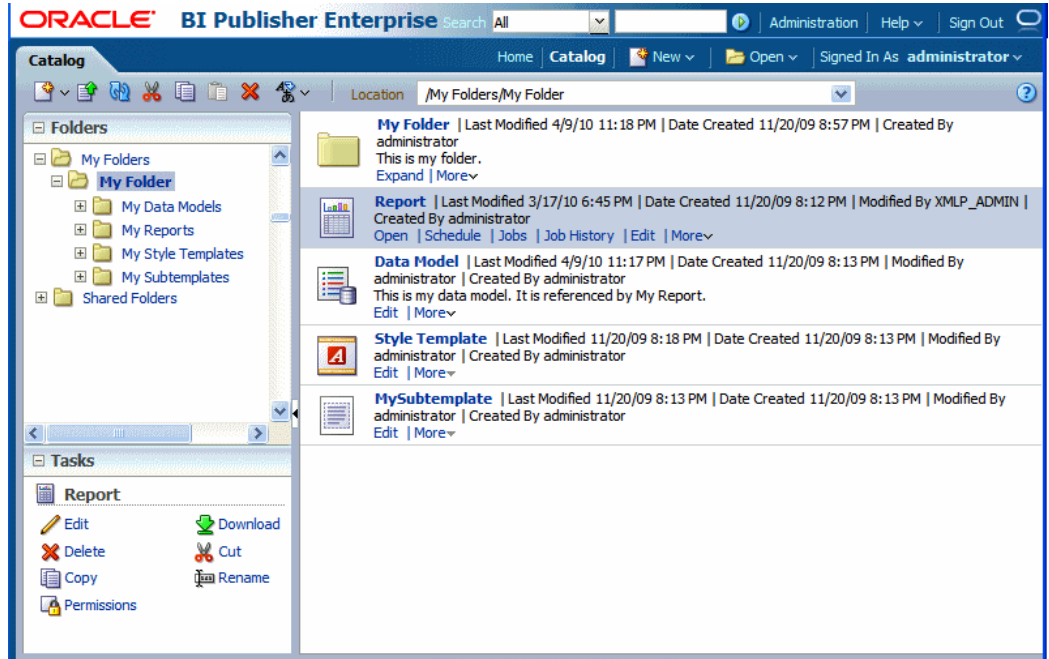
Contains a list of the reports that you have recently viewed, created, or updated. If your role includes access to data models, subtemplates, or style templates these will be included as well.

Most Popular

Contains the objects that are accessed the most often by you and the users assigned to the groups to which you belong.

About the Catalog

The catalog stores the objects, such as reports, data models, and style templates, that you create using Oracle BI Publisher. The following figure shows the Catalog page.



Use the Catalog page to locate objects in the catalog and perform tasks specific to those objects. The objects and options that are available to you are determined by your system privileges and the permissions assigned to individual folders and objects.

The Catalog page can also be used to perform more specialized tasks such as:

- Setting object-level permissions
- Downloading and uploading archived objects
- Exporting and importing catalog translations

For more information about the functions you can perform in the catalog, see: *Managing Objects in the Catalog*, page 7-1.

Browsing the Catalog

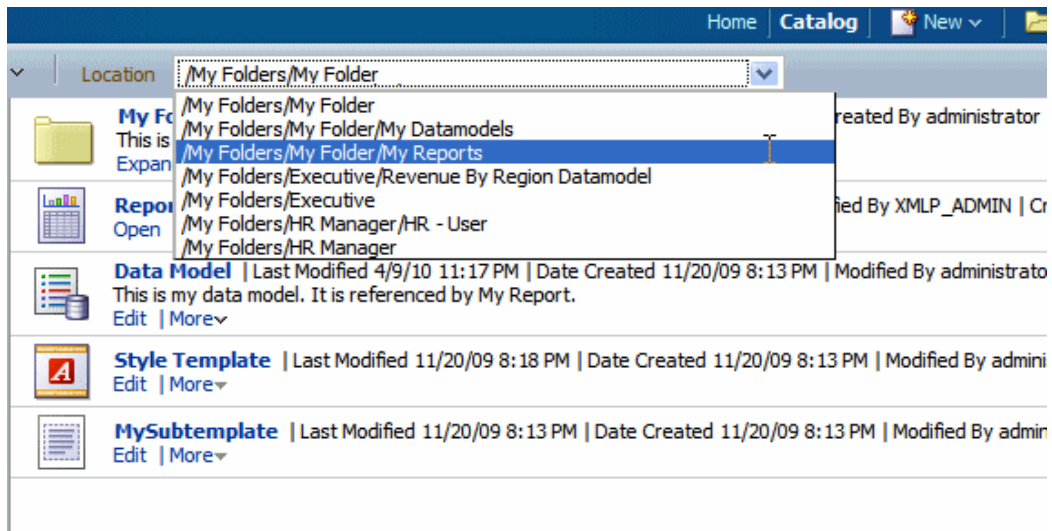
Use the Folders pane of the Catalog page to display and navigate the content of personal (My Folders) and shared folders that all users can access. Select a folder to view its contents in the display area.

Using the Location Bar to Find Your Place and Navigate Back

The **Location** bar displays your current location within the catalog directory structure. The **Location** bar also maintains catalog locations that you have visited while in your current catalog session.

To navigate back to a folder you previously visited in this session, click the arrow on the

Location bar to open the list of locations as shown in the following figure:



About the Global Header

The global header, shown in the following figure, contains links and options that enable you to quickly begin a task or locate a specific object within BI Publisher. Many of the options that are available from the global header are also available within the Home page.



The global header is always displayed when you are working in BI Publisher. When you are viewing a report or working within one of the task editors, you can use the global header to quickly begin a new task, search the catalog, access product documentation, or view a different object.

The **Signed In As** area enables you to access the **My Account** dialog, where you can specify your preferences. For more information, see *Setting Preferences*, page 2-3.

If you are logged in as an administrator, the **Administration** link will display in the global header to enable access to the Administration page. For more information about the tasks on the Administration page, see *About the Administration Page*, *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

Searching the Catalog

Use the global header search feature to quickly locate an object by type and name from anywhere in the catalog.

From the **Search** menu, select the object type and enter all or part of the object's name in the search field. Click the Search button to display the results that match your criteria.

From the results page you can select and perform an action on an object from the results, filter the search results, or start a new search.

Viewing a Report

About Viewing Reports in BI Publisher

View a report in your Web browser using the report viewer. Depending on the report properties and your user permissions, you may be able to select and view different layouts, interact directly with displayed data, change the output type, or send the report to someone else.

This chapter includes the following topics:

- Viewing a Report, page 3-1
- Using the Report Viewer Options, page 3-2
- Creating an Ad Hoc Pivot Table with the Analyzer, page 3-8
- Viewing Data in Microsoft Excel, page 3-14

Viewing a Report

All reports reside in the catalog. Your Home page will display recently viewed and most popular reports for quick access.

To view a report

1. Navigate to the report.

The **Catalog** displays two main reports folders.

- **Shared Folders** contains the reports and folders you have been granted access to based on your role.
- **My Folders** contains the reports and folders you have created.

- Open the appropriate folder and then click the report name or the **Open** link for the report. This will run the report using the options set in the report definition.

Note: Some reports are not configured for online viewing. For these reports, the **Open** link will not display. Select **Schedule** to schedule a report job. See Creating Report Jobs, page 4-1.

Some reports may require you to select parameter values before running the report. If the report does not immediately display data, select values for the displayed parameters and click **Apply**.

Using the Report Viewer Options

The following figure shows the report viewer:

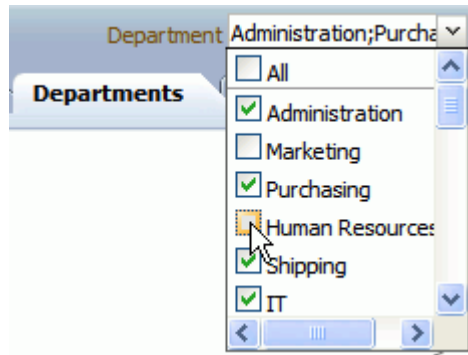


The following list describes components of the report viewer. Not all options are available for all reports:

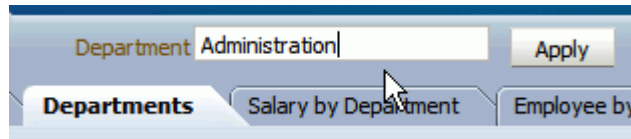
- Parameters** - if the report includes parameters, these are presented as prompts in the Report Viewer.

A parameter prompt may be presented in one of the following ways:

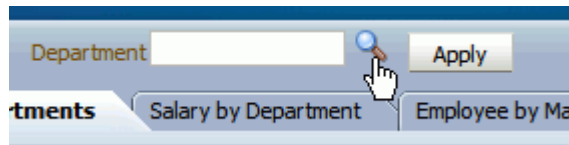
- A list from which you can make a selection (as shown above). Some lists support multiple selections. A multi-select list displays a check box next to each item. Click the box to select the item. Click the box again to deselect the item.



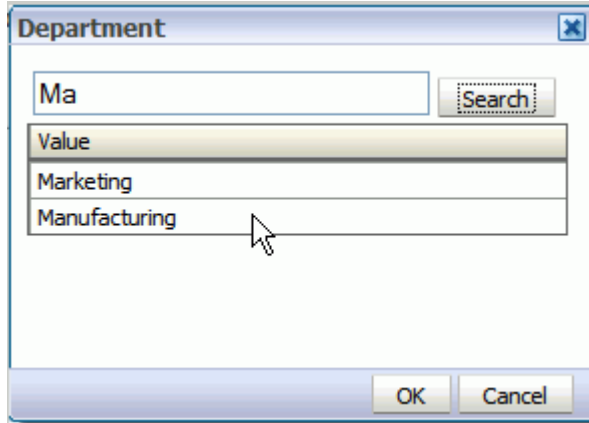
- A text box into which you can type a value.



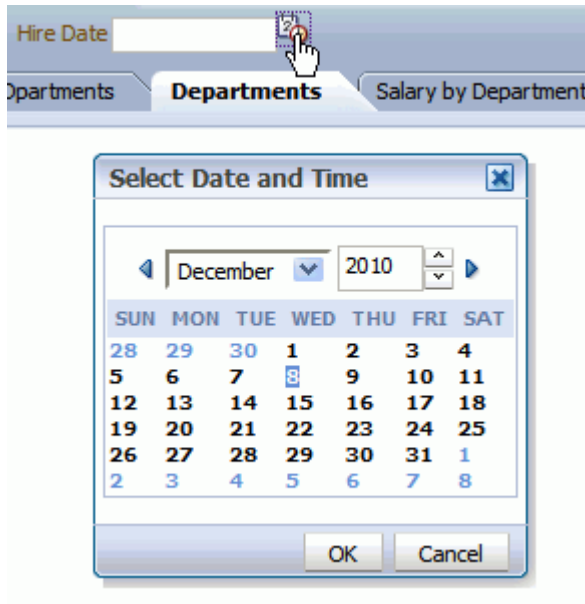
- A search icon that launches a search dialog. Note that search strings are case sensitive. The % can be used as a wild card. The search will return results when the value matches the initial string.



For example, in a list of department names the entry "Ma" returns the values "Marketing" and "Manufacturing". The search entry "%ing" would return "Accounting", "Manufacturing", and "Purchasing". Select the value from the returned list and click OK.



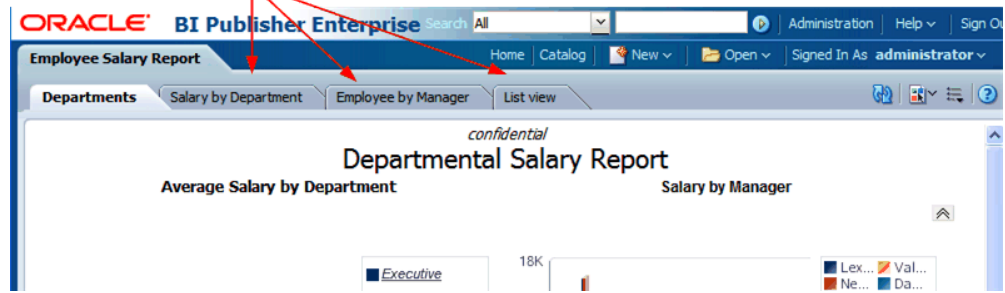
- A date picker that launches a calendar from which to select the date.



After selecting or entering a parameter value, click **Apply**.

- **Layout-** if multiple layouts are available they will be displayed as separate tabs in the report viewer page. To view the report displayed in a different layout, click the tab.

Each tab shows a different layout of the same data



- **View Report** - this list contains other output types that are available for this report. The output will be rendered in your browser or you may be prompted to open an appropriate application for viewing.



Possible output options are:

- **Interactive** - this output is only available for layouts designed using BI Publisher's Layout Editor. Interactive output enables pop-up chart value displays, scrollable and filterable tables, and other interactive features for a report.
- **HTML** - (Hypertext Markup Language) formats the report for browser viewing.
- **PDF** - (Portable Document Format) formats the report as PDF and opens the report in Adobe Acrobat reader. This output type is optimized for printing.
- **RTF** - (Rich Text Format) is a format used by word processing applications. If you have a word processing application installed, such as Microsoft Word or OpenOffice.org, you will be prompted to open the application for viewing.
- **Excel** - choose this output type to view the report in Excel if you have Microsoft Excel 2003. This option generates an MHTML format file that can be opened in Excel 2003 or later. This option supports embedded images, such as charts and

logos.

- Excel 2000 - choose this output type only if you are running the earlier versions of Microsoft Excel 2000 or 2002. This option generates HTML that can be opened in Excel. It does not support embedded images.
- Excel 2007 - choose this option to generate the report in Excel .xlsx (Excel XML format). If you have Excel 2007 or later installed, this option provides the best preservation of layout and formatting.
- PowerPoint - choose this output type to generate a PowerPoint file compatible with Microsoft PowerPoint 2003.
- PowerPoint 2007 - choose this output type to generate a PowerPoint 2007 file.
- Flash - displays output for templates designed using Adobe Flash. You must have the Adobe Flash Player Plug-in installed for your Web browser.
- CSV - displays the data in comma separated value format. The data must be in a simple <rowset>/<row> structure.
- Data - displays the report data as XML.

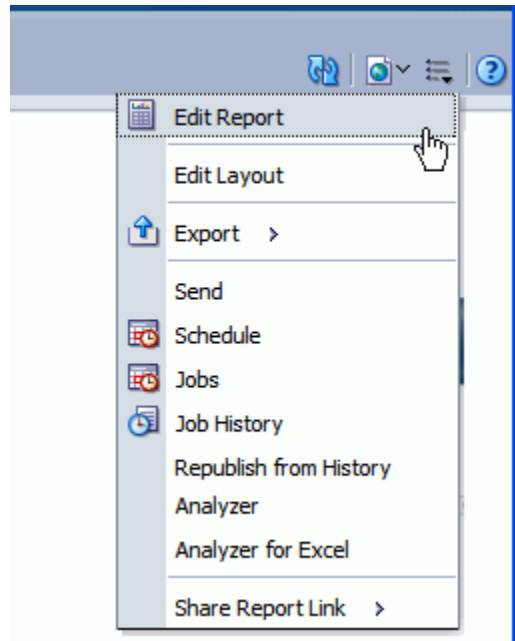
Important: For Safari browser users: The Safari browser renders XML as text. To view the XML generated by the data engine as XML, right-click inside the frame displaying the data and then click **View Frame Source**. This is a display issue only. The data will be saved properly if you choose to export the data.

- MHTML - (Mime HyperText Markup Language) this format enables you to save a Web page and its resources as a single MHTML file (.mht), in which all images and linked files will be saved as a single entity. Use this option if you want to send or save HTML output and retain the embedded images and stylesheet formatting.
- PDFZ - (Zipped PDF) - this option is only available for reports that have been designed to enable zipped PDF output. BI Publisher generates a zip file containing the report PDF output and index files.
- FO - generates an XML file with the XSL-FO information.

Actions

The **Actions** menu provides more actions that you can take on the report. The complete list of possible options follows. The options that are available to you will depend on

your user privileges and properties set for the report. The full list of options is shown in the following figure:



- **Edit Report** enables you to update the report definition. For example, you can add or create new layouts, update the report properties, or change the default parameter values. See *Creating a New Report, Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher* for information on using the report editor.
- **Edit Layout** enables you to update a layout. If the layout was created using BI Publisher's **Layout Editor**, the Layout Editor will launch in your browser. See *Creating a BI Publisher Layout Template, Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*. If the layout was not created in the Layout Editor, you will be prompted to save the template file. You can then open it in the appropriate application.
- **Export** exports the report to the default application for the output type you select (for example: Adobe Acrobat for PDF output or Microsoft Excel for Excel output).
- **Send** enables you to schedule the report for immediate delivery to an e-mail address, printer, or other destination.

The **Send** action launches the **Schedule Report Job** page where you can select the output, destination, and notification options.

Note: You cannot send a report in Interactive mode. First, select a different output type (such as PDF or HTML) from the **View Report** list and then click **Send**.

- **Schedule** creates a job to run and distribute the report. See *Creating Report Jobs*, page 4-1.
- **Jobs** enables you to view and manage currently scheduled jobs for this report. See *Viewing and Managing Report Jobs*, page 5-1.
- **Job History** enables you to view completed and running report jobs. See *Viewing and Managing Report History*, page 6-1.
- **Republish from History** enables you to select a previously scheduled, completed job and specific output for viewing in the report viewer.
- **Analyzer** enables you to create ad hoc pivot views of the data using the **Online Analyzer**. See *Using the Online Analyzer*, page 3-8.
- **Analyzer for Excel** exports the report data to Microsoft Excel. See *Using the Oracle BI Publisher Analyzer for Excel*, page 3-14.
- **Share Report Link** enables you to generate a link that you can copy and reuse, based on the report that you are currently viewing. When you select one of the options, a dialog displays the URL to the report. You can control what will be displayed by the URL as follows:
 - **Current Page** displays the current page as shown.
 - **No Header** displays the current report without the BI Publisher logo, tabs, or navigation path.
 - **No Parameters** displays the current report without the header or any parameter selections. The Actions menu, Export, and View Report menus will still be available.
 - **Document Only** displays the URL to the current report document only. No other page information or options will be displayed.

Note: **Share Report Link** is a report property that can be disabled. See *Defining Report Properties, Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher* for information on setting this and other report properties.

Creating an Ad Hoc Pivot Table with the Analyzer

Note: Your administrator must assign you the appropriate permissions to use this feature.

The online Analyzer enables you to create ad hoc analyses of your data by quickly dragging and dropping your report data elements into a pivot table structure. You can then save your pivot table as a layout for the report. The interface enables you to easily rearrange and pivot your data by dragging items to different row, column or summary positions.

You can limit the data displayed in your pivot table by defining page-level filters. The page-level filter is an element from your data set by which to specify the results displayed in the table. Drag and drop the desired element from the data pane to the Page item area to automatically create a menu of the values for that element. You can then select a value from the list to filter the results in the table to display only the data that corresponds to your selection.

After selecting all the data elements for the table, choose whether to view the Sum, Average, or Count of the data.

This topic contains two procedures:

- Creating an Interactive Pivot Table, page 3-10
- Saving Your Interactive Pivot Table as a Layout, page 3-13

Limitations of the Online Analyzer

Because the data presented in the Online Analyzer is from the source XML file, no data type information is available; therefore, number formats cannot be localized according to Report Locale preferences.

Accessing the Online Analyzer

To access the Online Analyzer:

- From the Report Viewer, click **Actions**, then click **Analyzer**.

About the Online Analyzer Toolbar

The Analyzer toolbar enables you to perform the following functions:

- **New** creates a new empty pivot table structure. If you have already created an analysis that you want to save, you must click **Save** before you click **New**.
- **Export** - enables you to export and save your pivot table as a BI Publisher layout.
- **Move decimal left** - click once to display an additional decimal position. You can continue clicking to move the decimal multiple times.
- **Move decimal right** - click once to remove the display of a decimal position. You can continue clicking to move the decimal multiple times.

Creating an Interactive Pivot Table

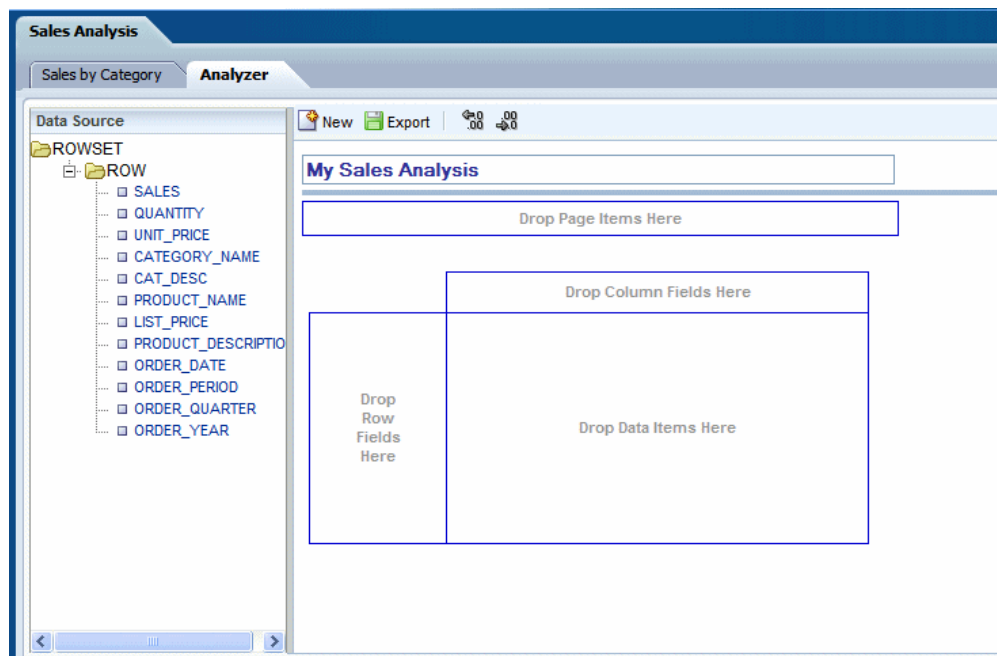
This procedure describes how to create an interactive pivot table using the Online Analyzer:

To create an interactive pivot table:

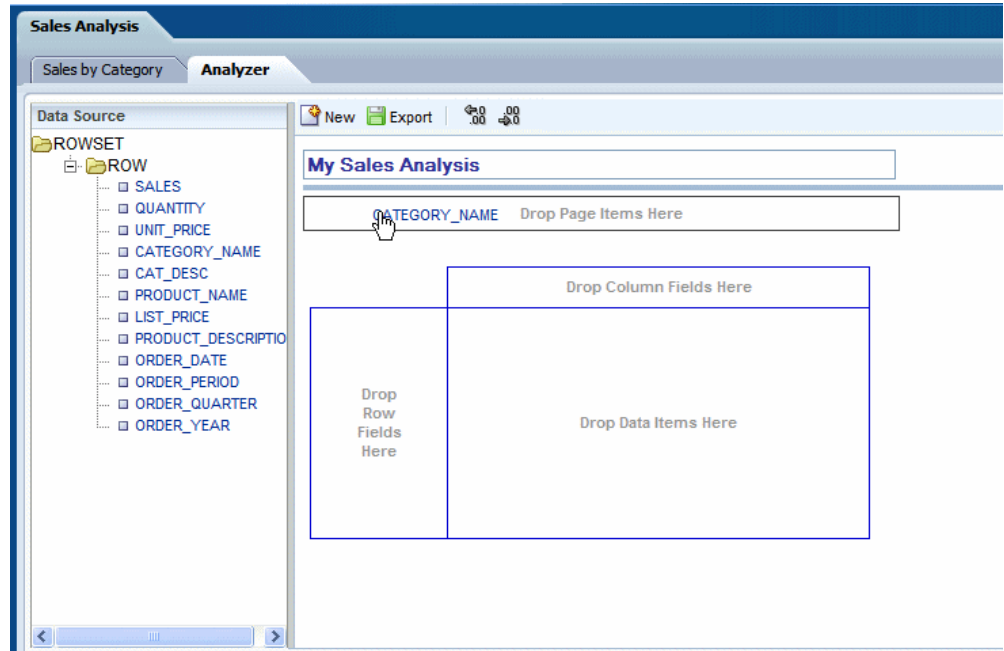
The following example displays the usage of the Analyzer with a simple Sales Analysis report:

1. From the report viewer, click **Actions** and then click **Analyzer**.

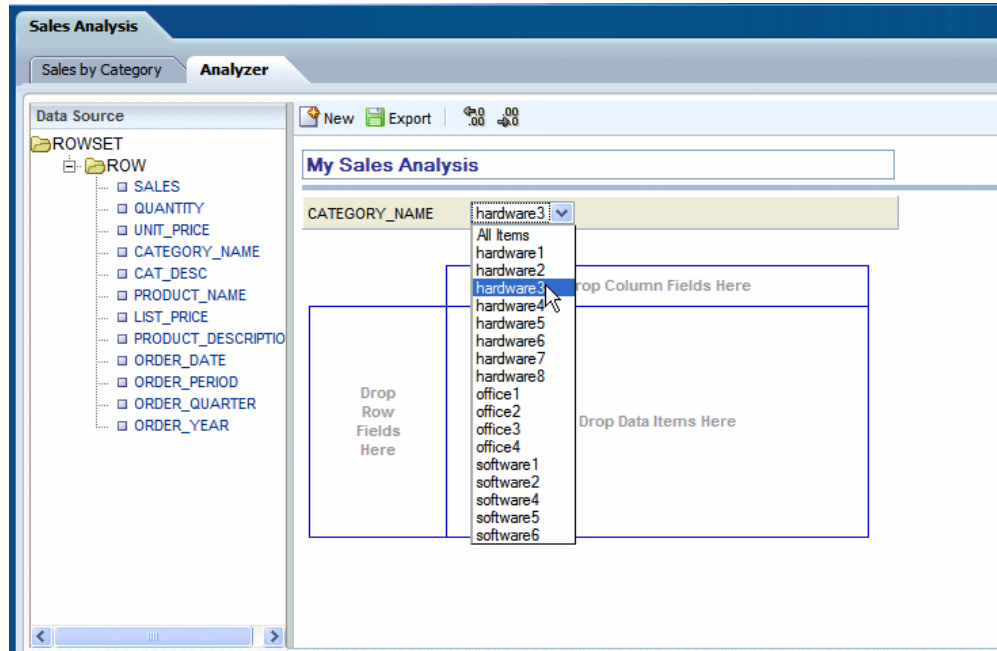
The Analyzer interface displays the list of data fields on a pane and an empty pivot table structure on the adjacent pane, as shown in the following figure.



2. To filter by `CATEGORY_NAME`, drag the item to the Page Items region, as shown in the following figure:



Now you can choose a value from the CATEGORY_NAME list to filter the page data as shown in the following figure:

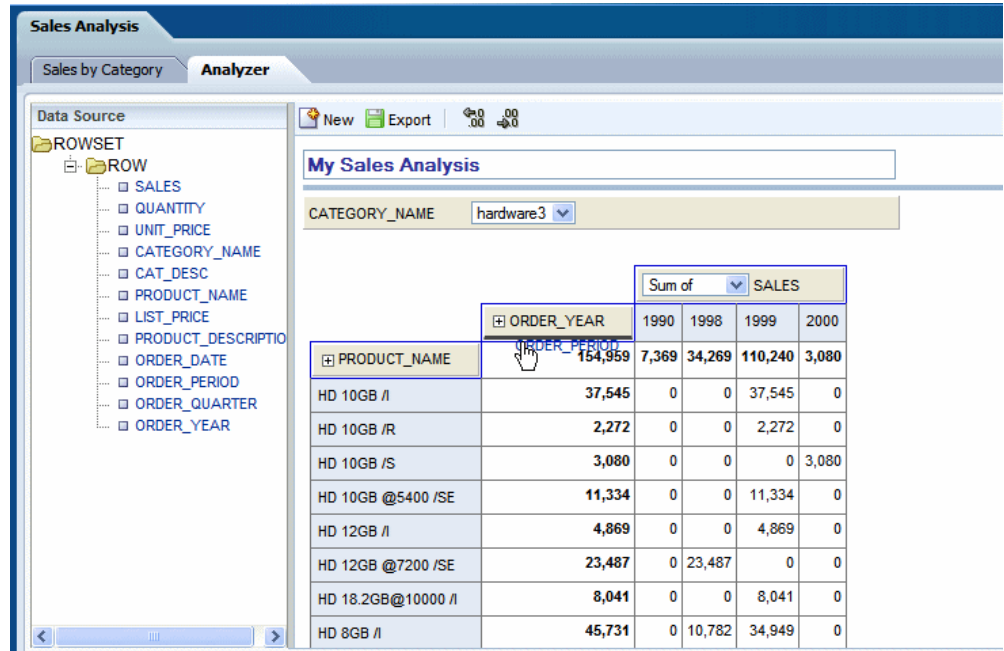


- To view product sales by year, drag `PRODUCT_NAME` into the Row Field area, and drop `ORDER_YEAR` into the Column Field area. Drop the `SALES` data into the table body area, as shown in the following figure:

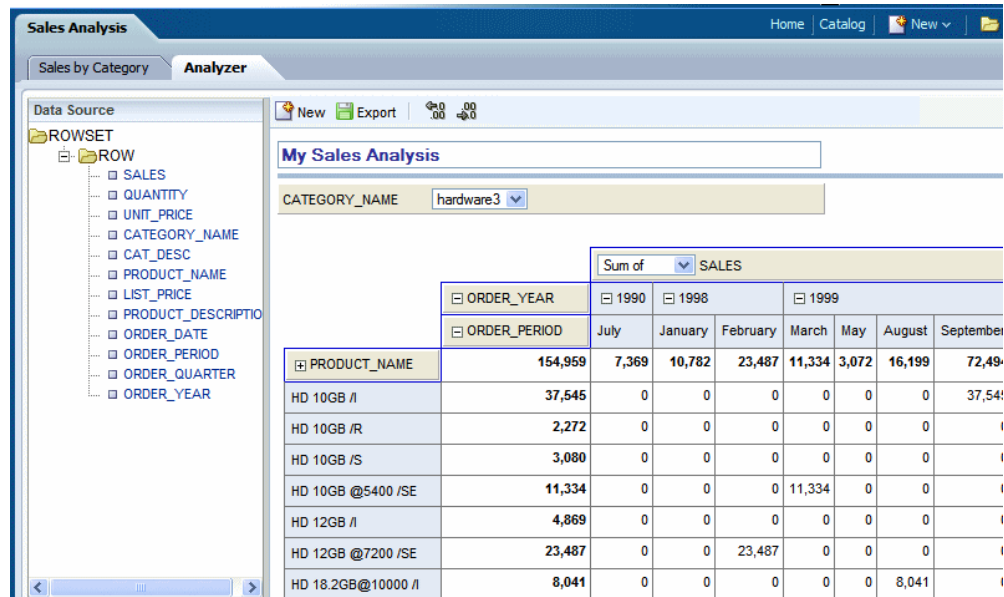
		Sum of SALES				
	ORDER_YEAR	1990	1998	1999	2000	
PRODUCT_NAME		154,959	7,369	34,269	110,240	3,080
HD 10GB /I		37,545	0	0	37,545	0
HD 10GB /R		2,272	0	0	2,272	0
HD 10GB /S		3,080	0	0	0	3,080
HD 10GB @5400 /SE		11,334	0	0	11,334	0
HD 12GB /I		4,869	0	0	4,869	0
HD 12GB @7200 /SE		23,487	0	23,487	0	0
HD 18.2GB@10000 /I		8,041	0	0	8,041	0

You can now see the calculated sales totals as a sum of the data items.

- Add the dimension of `ORDER_PERIOD` to the table by dragging the data item over the `ORDER_YEAR` as shown in the following figure:



- Now you can click the ORDER_YEAR to open it up to display each ORDER_PERIOD total. Click again to close the item and view only the ORDER_YEAR total.



Saving Your Interactive Pivot Table as a Layout:

You can save your pivot table as a layout for your report by exporting it and saving it as a BI Publisher layout. The export command saves the pivot table as the BI Publisher

layout type (.xpt). It will then have all the features and properties of a BI Publisher layout.

1. Click **Export**.
2. In the dialog, enter a name. The analyzer layout will be saved as a layout selection for this report.
3. Close the Online Analyzer.
4. On the **Actions** menu, click **Edit Report**.
5. From the Report Editor, click **View a List** to display the layouts in the list view.
6. Locate your new layout in the layout table and select a locale for it.
7. Click **Save**.

Using the Analyzer for Excel

Note: Your administrator must assign you the appropriate permissions to use this feature.

Prerequisites

- Download and install the Analyzer for Excel from the Home Page, **Get Started** region: Click Download BI Publisher Tools and then click Analyzer for Excel.
- Microsoft .NET Framework 3.0 or later
If not installed on your computer, you will be prompted to download it the first time you use the Analyzer for Excel.
- Supported version of Microsoft Excel. See System Requirements and Certification, page x for the most up-to-date information on supported hardware and software.

Important: If you have previously installed the Analyzer for Excel, and you are installing a later version, perform the following:

1. Uninstall the current version of Analyzer for Excel from the Control panel, using the Add or Remove Programs function.
2. Remove Xmlpreportaddin.xla from the add-ins list.

To remove it from Word 2003: On the **Tools** menu, click **Add-ins**, then click Xmlpreportaddin.xla to remove it.

To remove it from Word 2007 or 2010: Click the **Office** button, then click **Excel Options**, then click **Add-Ins**. Next to **Manage: Excel Add-ins**, click **Go**. Select the box next to Xmlpreportaddin. When prompted, delete it from the list.

Features

The Analyzer for Excel offers two modes: online mode and offline mode. The report designer sets the mode as a property of the report. The online mode is the default mode and is described in this section. For information on the offline mode, see *Excel Analyzer Options, Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

The Analyzer for Excel enables you to:

- Export the results of the report query to an Excel spreadsheet
- Log in to BI Publisher Enterprise from Excel to refresh your data, apply new parameter values, and apply layout to the report data
- Create Excel Analyzer layouts and upload them to the BI Publisher server
- Access and run your reports from an Excel session

Launching the Analyzer for Excel

1. From the report viewer, click the **Actions** toolbar button, then select **Analyzer for Excel** from the list. You will be prompted to save or open the report file.
2. When you open the file in Excel, select **Enable Macros** from the Excel dialog.

Note: You must enable macros to use the Analyzer for Excel in online mode.

Your report data displays in an Excel worksheet and the Oracle BI Publisher menu appears on your Excel menu bar. Note that the data are the results of the report query with no layout or filtering applied.

You can now manipulate the report data in Excel.

If the report has parameters, the parameter fields will appear at the top of the worksheet, but you must log in to apply new parameter values. See the Analyzer for Excel help, or *Using the Oracle BI Publisher Menu*, page 3-16.

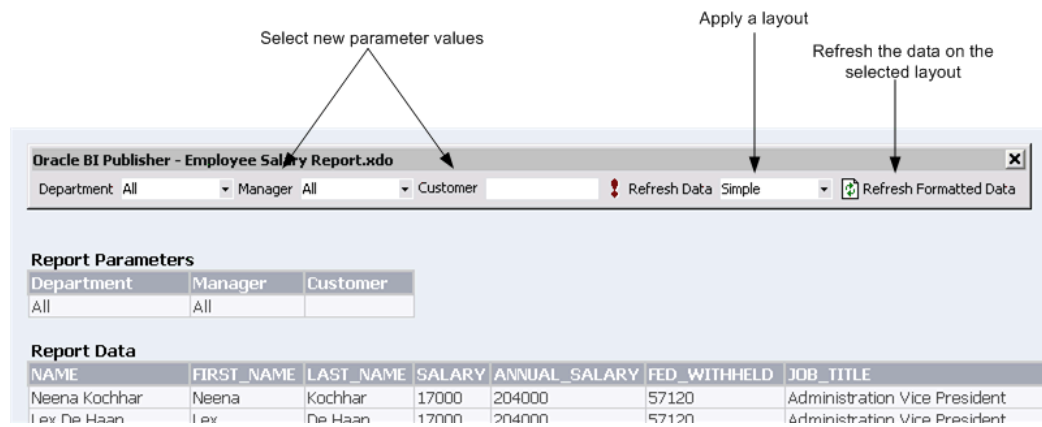
Using the BI Publisher Menu

You must log in to enable all the menu commands.

Login enables you to log in to BI Publisher. See Logging in Through Excel, page 3-17.

Show Report Parameters – displays the updateable parameters and available layouts for the report in a toolbar.

Analyzer for Excel Toolbar



To update the data, select a new parameter value then click **Refresh Data** to refresh the data in the current sheet.

To apply a layout, select the layout, then click **Refresh Formatted Data**. This will download the report as HTML into a new worksheet. Select the new worksheet to see the data with the new layout applied.

Note: The layout you select must have HTML as an available output.

To change the parameter values from this worksheet, select the new values, then click **Refresh Data**, then click **Refresh Formatted Data**.

Update Excel Template

If you have edited the layout and wish to save your changes, use this option to upload the updated layout to the report definition in the BI Publisher catalog.

Note that to include charts in your saved layout, you must create them on the same worksheet that is downloaded by the Excel Analyzer.

Add as New Excel Template

Use this option to upload your layout and save it to the report definition.

View Report Online

Launches the report viewer page.

Browse for Reports Online

This feature enables you to select reports from the BI Publisher catalog and open them directly in Excel. You can either download the report data to Excel, or download an existing layout to update it or to use as a starting point for a new layout. See *About the Open Template Dialog*, page 3-17.

Preferences - select your locale and proxy settings if required.

About the Open Template Dialog

When you use the Open Template dialog to initiate the layout building process, you can then use the Update Excel Template options from the Oracle BI Publisher Menu to upload the layout directly to the appropriate report in the BI Publisher catalog.

Workspace

Select Oracle BI Publisher to browse the catalog.

Reports Pane

The Reports pane lists the reports in the selected folder. Select a report to display the available layouts in the Layout Templates pane.

Open Layout Template Downloads and opens the selected template in the Analyzer for Excel.

To start a new template, select <New> from the list of templates then select Open Layout Template; or double-click <New>.

Use the Report Browser's Up icon to move up the directory structure.

Use the View As menu to view the folder contents as Large Icons, Small Icons, List or Details.

Logging in Through Excel

Once you have installed the Analyzer for Excel, you can log in to the BI Publisher from Excel, you do not have to log in to BI Publisher first.

Once you have Excel open, select **Log in** from the Oracle BI Publisher menu. The BI Publisher log in screen will prompt you to enter your credentials and to select (or enter) the Report Server URL. For example: `http://example.com:7001/xmlpserver`.

Important: For Oracle BI Enterprise Edition installations, the URL must point to the `/xmlpserver` as shown above.

Creating Report Jobs

This chapter covers the following topics:

- Navigating to the Schedule Report Job Page
- Setting General Options
- Setting Output Options
- Defining the Schedule for Your Job
- Configuring Notifications
- Submitting and Monitoring the Job
- Creating a Bursting Job
- Advanced Topics

Navigating to the Schedule Report Job Page

Use the **Schedule Report Job** page to schedule a report job.

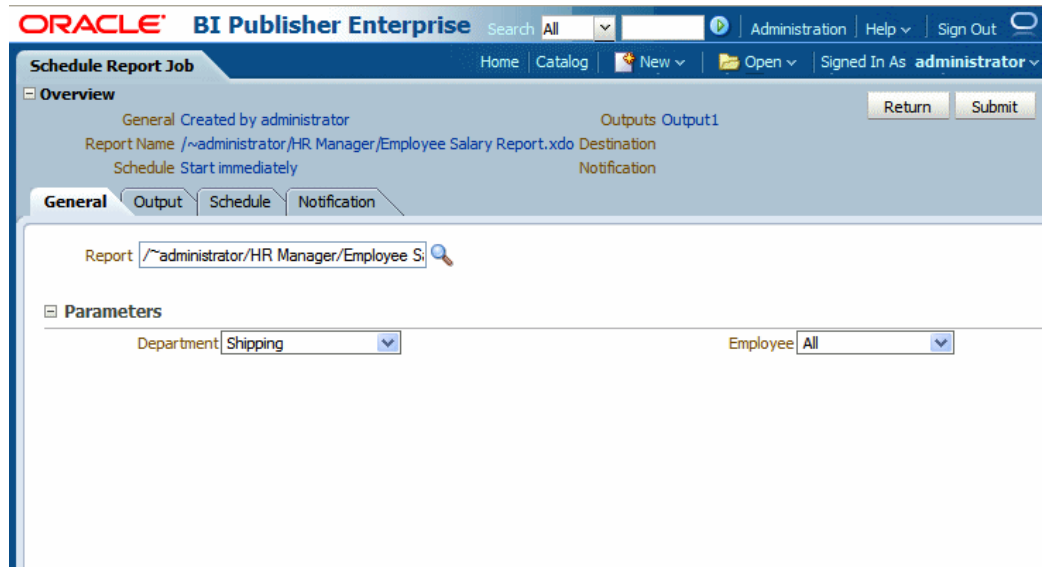
Navigate to the Schedule Report Job page in any of the following ways:

- From the Home page: From the **Create** region select **Report Job**
- From the catalog: Navigate to the report you wish to schedule, then select the **Schedule** link.
- From the Report Viewer: Click **Actions** then click **Schedule**.
- From the global header: Click **New** then click **Report Job**.

The **Schedule Report Job** page contains four tabs to define the options for your report job: **General**, **Output**, **Schedule**, and **Notification**.

Setting General Options

The **General** tab is shown in the following figure:

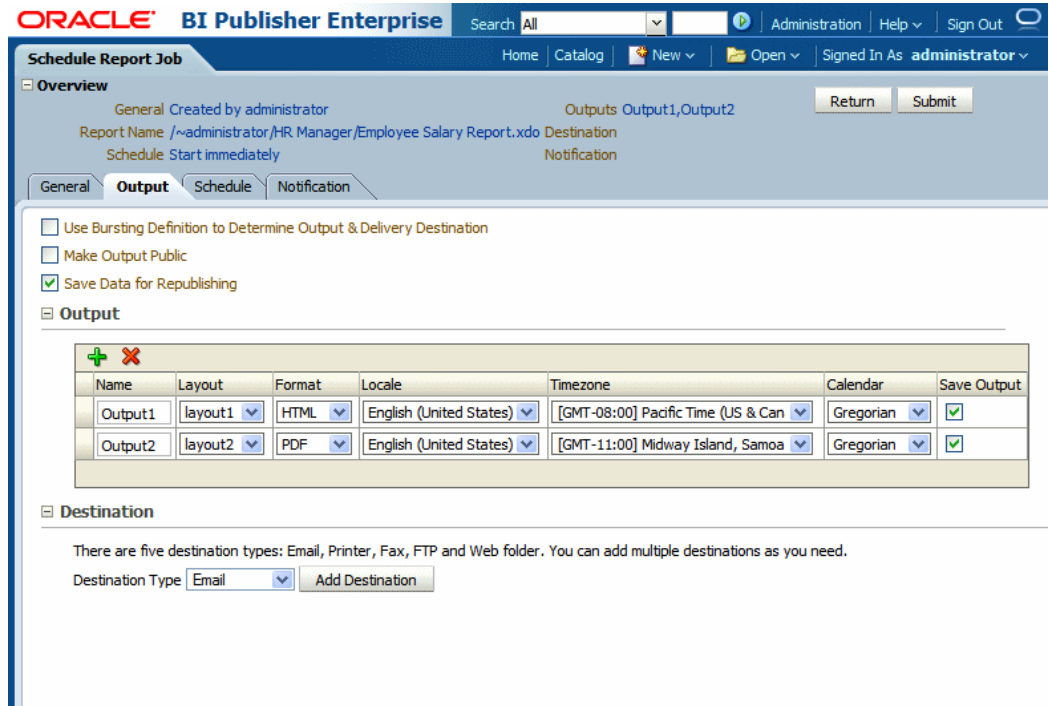


Enter the following general information for your report job:

Field	Description
Report	<p>If you accessed the schedule page from the report, this field will display the report path and name.</p> <p>If you accessed the schedule page from the Create region or the global header, click Choose to browse for and select the report you wish to schedule.</p>
Parameters	<p>If the report definition includes parameters, these will be displayed. Enter the values you wish to use for this job.</p> <p>Note: Date parameters can be incremented. See <i>Incrementing Date Parameters</i>, page 4-10.</p>

Setting Output Options

The **Output** tab has two regions: **Output** and **Destination**. Each scheduled job can have multiple output files with distinct characteristics. Each output file can have multiple destinations. The **Output** tab is shown in the following figure:



Make selections for the following options:

Option	Description
Use Bursting Definition to Determine Output and Delivery Destination	Select this box to use the report bursting definition for output and delivery. Once selected, all other fields on this page are disabled for selection. Note that this box is only available for selection if the report has a bursting definition. For more information on report bursting, see <i>Scheduling a Report to be Burst</i> , page 4-9.
Make Output Public	Select this box to make this job output available to all users with permission to access this report. Users with access can view the report from the Report Job History page.
Save Data for Republishing	Select this box to save the XML data that is generated for this job. You can access and download the saved data from the Report Job History page (see <i>Viewing and Managing Report Job History</i> , page 6-1) or choose to republish this data, selecting a new layout and output options.

Adding Outputs

The **Output Table** enables you to create multiple report documents for one or more layouts using a combination of output format, locale, time zone and calendar. To add

outputs for this job, click the **Add** toolbar button to add an entry to the table.

Field	Description
Name	Enter a name for this output, or accept the default.
Layout	Choose the layout to apply to this output.
Format	<p>Choose the document output format. Output format is the type of document that is generated, for example, PDF, HTML, or Excel. The options available here are specified in the report definition.</p> <p>Tip: If you require that the output be viewed as HTML and the report will contain images, charts, or other linked files, be sure to select output type MHTML to include the referenced files in the output.</p>
Locale	<p>Select the language-territory combination for this report output. This field defaults to the Report Locale defined in the user Preferences (see Setting Preferences, page 2-3).</p> <p>Note: If the layout does not have an available translation for the selected locale, BI Publisher will apply a locale fallback logic to select the layout. For more information, see Locale Selection Logic, <i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i>.</p> <p>The appropriate number and date formatting will be applied independently of the template translation.</p>
Timezone	Select the time zone that you want to use for this report output. The time zone defaults to the time zone defined in the user Preferences (see Setting Preferences, page 2-3).
Calendar	Choose the calendar to apply to this output.
Save Output	Select this box if you want the report output saved. You must select this option if you want to view your report from the Report Job History page.

Adding Destinations

Enter the delivery details in the Destination region. To deliver a report document to multiple destinations, select the **Add Destination** button and continue adding

destinations as needed.

Note: Delivery servers are set up in the Administration interface. For more information, see *Setting Up Delivery Servers, Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

If you do not require a destination, leave this region blank. Select the **Save Output** check box to view the output from the **Report Job History** page. See *Viewing Report History*, page 6-1.

For each destination you add, select from the Output list which documents to send to this destination.

The screenshot shows a configuration window titled "Destination". At the top, it states: "There are five destination types: Email, Printer, Fax, FTP and Web folder. You can add multiple destinations as you need." Below this, the "Destination Type" is set to "Email" with a dropdown arrow and an "Add Destination" button. The "Email" section has a "To" field, a "Cc" field, a "Reply to" field, and a "Subject" field. To the right of these fields is an "Output" list with three items: "All", "Output1", and "Output2", each with a checked checkbox. A "Message" text area is located to the right of the "Output" list. A red "X" icon is in the top right corner of the "Email" section.

Then enter the appropriate fields for each destination type:

Email

Enter multiple e-mail addresses separated by a comma. Enter any **Message** text that you want to include with the report.

Printer

Select the **Printer Group** and the **Printer**, enter the **Number of copies**, and select Single sided or Double sided (the printer must support duplex printing for this option to take effect), then optionally select the printer **Default Tray** from which to print the report, and the **Print Range** pages to print if you do not wish to print the entire report.

Fax

Select the **Fax server** to deliver the report and enter the **Fax number** to which to send the report.

FTP

Select the **FTP Server** the server to deliver the report and enter valid **Username** and **Password** credentials.

Remote Directory - enter the directory to which to deliver the document (example: /pub/). If no value is entered, the document will be delivered to the login directory.

Remote File Name - enter the file name for BI Publisher to assign to the delivery document on the remote server. (Example: myreport.pdf)

To assign a file name dynamically using a date expression, see *Defining a Destination File Name Dynamically Using a Date Expression*, page 4-11.

Use Secure FTP - select the box to use secure FTP.

Web Folder

Select the **Web Folder Server** where you want the report delivered and enter valid **Username** and **Password** credentials.

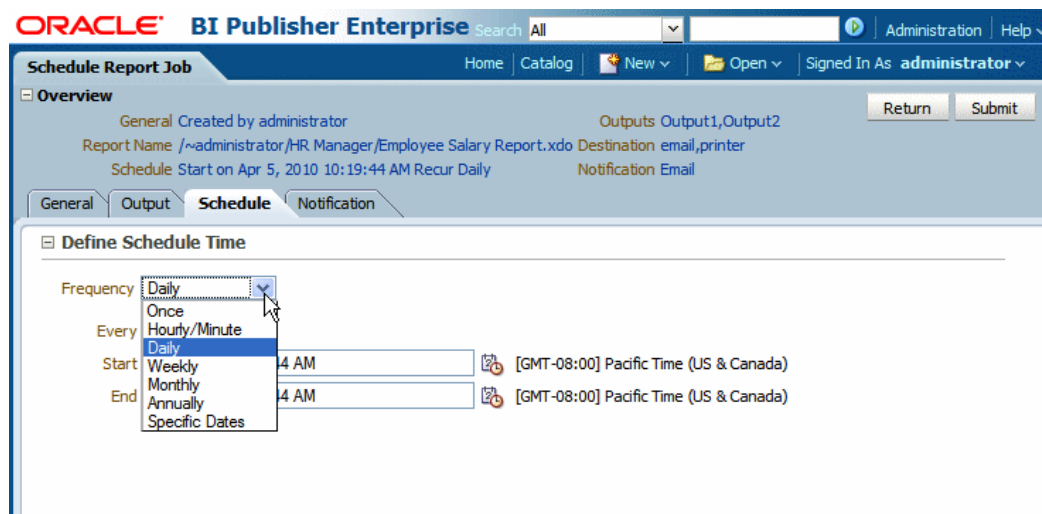
Remote Directory - enter the directory to which to deliver the document (example: /pub/). If no value is entered, the document will be delivered to the login directory.

Remote File Name - enter the file name for BI Publisher to assign to the delivery document on the remote server. (Example: myreport.pdf)

To assign a file name dynamically using a date expression, see *Defining a Destination File Name Dynamically Using a Date Expression*, page 4-11.

Defining the Schedule for Your Job

Use the **Schedule** tab to define the frequency for your report job. The **Schedule** tab is shown in the following figure:



Defining Schedule Times

Choose from the following recurrence pattern options:

Once

Select **Run Now** or use the date selector to enter the specific **Start** date and time.

Hourly/Minute

Every - select Hour(s) or Minute(s) and enter the appropriate integer value for the increment.

Start - use the date selector to enter the date and time to start running this job.

End - (optional) use the date selector to enter an end date and time for this job.

Daily

Every - enter the increment in days. For example, to run the report every day enter 1; to run the report every other day, enter 2.

Start - use the date selector to enter the date and time to start running this job. The time selected will determine the time that the job is executed each day it runs.

End - (optional) use the date selector to enter an end date and time for this job.

Weekly

Every - enter the increment in weeks and select the desired day or days of the week. For example, to run the report every Tuesday and Thursday, enter 1, then select Tuesday and Thursday. To run the report every other Wednesday, enter 2, and select Wednesday.

Start - use the date selector to enter the date and time to start running this job. The time selected will determine the time that the job is executed for each run.

End - (optional) use the date selector to enter an end date for this job.

Monthly

Every - select each month that the job will execute.

On - select either a day of the week, for example: 1st Monday of every month; or select a specific day of the month, for example: 15.

Start - use the date selector to enter the date and time to start running this job. The time selected will determine the time that the job is executed for each run.

End - (optional) use the date selector to enter an end date for this job.

Annually

Every - enter the increment in years that the job will execute.

On - select either a day and a month, for example: Day 1 of January; or select a day of the week of the month, for example: First Monday of January.

Start - use the date selector to enter the date and time to start running this job. The time selected will determine the time that the job is executed for each run.

End - (optional) use the date selector to enter an end date for this job.

Specific Dates

Add Date - use the date selector to enter the specific date and time to run the job. Add multiple specific dates as needed.

Configuring Notifications

A notification is a message that a job has finished processing. BI Publisher supports three notification statuses that you can subscribe to:

- Completed
- Completed with warnings
- Failed

BI Publisher supports two methods of notification: e-mail and HTTP.

Adding Notifications

Use the **Notification** tab to configure notifications for a job.

The screenshot shows the Oracle BI Publisher Enterprise interface. The main title is "ORACLE BI Publisher Enterprise". Below the title, there are navigation links: "Home", "Catalog", "New", "Open", and "Signed In As administrator". The current page is "Schedule Report Job". The "Overview" section shows: "General Created by administrator", "Outputs Output1,Output2", "Report Name /~administrator/HR Manager/Employee Salary Report.xdo", "Destination email,printer", "Schedule Start on Apr 5, 2010 10:19:44 AM Recur Daily", and "Notification Email". The "Notification" tab is selected, showing the following configuration options:

- Notify By:** Email, HTTP
- Email Address:** administrator@mycompany.com
- When (for Email):** Report completed, Report completed with warnings, Report failed
- HTTP Server:** Notification Server (dropdown)
- User Name:** (text input)
- Password:** (password input)
- When (for HTTP):** Report completed, Report completed with warnings, Report failed

Email

To enable an e-mail notification.

Select the report completion status or statuses for which you want to be notified, and enter a comma-separated list of addresses to which to send the notification.

HTTP

To enable an HTTP notification:

Select the report completion status or statuses for which you want the notification to be sent. Select the server to which to send the HTTP notification. Enter the user name and password for the server, if required.

Note that the HTTP server must be set up as a delivery option by the Administrator for the HTTP notification to be available. For more information, see *Adding an HTTP Server, Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

Submitting and Monitoring the Job

Submit the Schedule Job

Select **Submit**. This will invoke the **Submit Job** dialog with confirmation details for you to review. Enter a name for this job and click **Submit**.

To suspend or delete a job, navigate to the **Manage Report Jobs** page as follows: On the global header, click **Open** and then click **Report Jobs**. See *Viewing and Managing Report Jobs*, page 5-1.

To monitor a running or job see the results, navigate to **Report Job History** page as follows: On the global header, click **Open** and then click **Report Job History**. See *Viewing Report Job History and Saved Output*, page 6-1.

Creating a Bursting Job

Note: Bursting is the splitting of the report data into multiple blocks based on a key field in the data and then applying specific parameters for the layout and delivery for each block of data. For example, a customer invoice report can be burst to deliver each customer's invoice to their own e-mail address. A bursting definition for a report is set up in the report's data model. For more information, see *Adding a Bursting Definition, Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher*.

If your report has been enabled for bursting, the **Use Bursting Definition to Determine Output & Delivery Destination** box on the **Output** tab will be enabled. If you select this option, the Output and Destination options for the job will be disabled because output and destination details are supplied by the bursting definition.

Enable a report to use a bursting definition on the **Report Properties** dialog of the report editor. For more information see *Configuring Report Properties, Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

Advanced Topics

This section includes the following topics:

- Incrementing Date Parameters, page 4-10
- Defining a Destination File Name Dynamically Using a Date Expression, page 4-11

Incrementing Date Parameters

If your scheduled report includes date parameters, when you enter the values for the dates for the schedule, these values are not updateable. Therefore, every time a scheduled instance of the report is run, the same date parameters will be used. If you require that the date parameters be incremented for each run, then you can enter an expression in the date parameter field of the scheduler to calculate the date each time the report job executes.

For example, assume you create a schedule for a report that runs every Monday to capture data from the previous week. Each week you need the date parameters passed to the report to increment to the first and last days of the previous week.

Enter one of the following functions using the syntax shown to calculate the appropriate date at the scheduled runtime for the report:

- `{ $SYSDATE () $ }` - current date (the system date of the server on which BI Publisher is running)
- `{ $FIRST_DAY_OF_MONTH () $ }` - first day of the current month
- `{ $LAST_DAY_OF_MONTH () $ }` - last day of the current month
- `{ $FIRST_DAY_OF_YEAR $ }` - first day of the current year
- `{ $LAST_DAY_OF_YEAR $ }` - last day of the current year

The date function calls in the parameter values are not evaluated until the report job is executed by the Scheduler.

You can also enter expressions using the plus sign "+" and minus sign "-" to add or subtract days as follows:

- `{ $SYSDATE () +1 $ }`
- `{ $SYSDATE () -7 $ }`

For our example, to capture data from the previous week, each time the schedule runs,

enter the following in the report's date parameter fields:

- Date From: { \$SYSDATE () -7\$ }
- Date To: { \$SYSDATE () -1\$ }

Note: The date functions can also be set up as default parameter values in the data model. In this case, every time a user views the report from the report viewer, the date parameters will be calculated according to the expression supplied for the default value. See *Adding Parameters, Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher*.

Defining a Destination File Name Dynamically Using a Date Expression

When entering the remote file name for a Web folder or FTP destination you can enter a date expression to have BI Publisher dynamically include a date expression in the file name. The date is set at runtime, using the server time zone.

The supported date expressions are:

Expression	Description
%y	Displays the year in four digits: Example: 2011
%m	Displays the month in two digits: 01-12 (where 01 = January)
%d	Displays the date in two digits: 01-31
%H	Displays the hour in two digits based on 24-hour day: 00-24
%M	Displays the minute in two digits: 00 - 59
%S	Displays the number of seconds in two digits: 00 - 59
%l	Displays milliseconds in three digits: 000 - 999

Examples

Creating a File Name That Appends a Date

To create a file name that appends the day, month, and year, such as:

myfile_01_11_2010.pdf

Enter the following:

```
myfile_%d_%m_%y.pdf
```

Creating a File Name That Prefixes a Date and Appends a Time

To create a file name that prefixes the day, month, and year and appends the hour and minute, such as:

```
01_01_2010_myfile_22_57.pdf
```

Enter the following:

```
%d_%m_%y_myfile_%H_%M.pdf
```

Note: If your file name includes an undefined expression, such as `my_file_%a%b%c.pdf`, the file will be created as named: `"my_file_%a%b%c.pdf"`.

Viewing and Managing Report Jobs

This chapter covers the following topics:

- About the Manage Report Jobs Page
- Viewing Jobs for a Specific Report
- Searching for Report Jobs
- Setting the Time Zone for Viewing Jobs
- Viewing Job Details
- Linking to Job History
- Pausing Jobs
- Resuming Jobs
- Deleting Jobs
- Refreshing the Manage Report Jobs Page

About the Manage Report Jobs Page

The **Manage Report Jobs** page displays information about future scheduled and recurring report jobs and enables you to take actions on these jobs. You can access this page and then search for the report jobs to manage; or, you can access this page from the context of a specific report.

To search for jobs to manage, navigate to this page in one of the following ways:

- From the Home Page: Under **Browse/Manage** click **Report Jobs**
- On the global header: Click **Open**, and then click **Report Jobs**

To access this page from the context of a specific report perform one of the following:

- From the catalog: Navigate to the report in the catalog and then click **Jobs**

- From the report viewer page, click **Actions** and then click **Jobs**

The following figure shows the Manage Report Jobs page:

The screenshot displays the 'Manage Report Jobs' page in Oracle BI Publisher Enterprise. The page includes a search bar at the top, a 'Last Refreshed' timestamp, and a 'Select time zone to view jobs' dropdown menu. Below these are filter sections for 'Report Job Name', 'Report Name', 'Status', 'Start Time', 'End Time', 'Owner', and 'Scope'. A table titled 'Report Jobs' lists various jobs with their details.

Report Job Name	Report Name	Status	Start Time	End Time	Frequency	Owner	Scope	History
Daily Updates	/Samples/Executive/Sales Dashboard	Pending	4/5/10 10:20 PM	4/29/11 9:20 PM	Repeats Daily	administrator	Private	History
Quarterly Income	/Samples/Executive/Quarterly Income	Pending	6/16/10 9:19 PM		Custom Frequency	administrator	Private	History
Quarterly Income	/Samples/Executive/Quarterly Income	Pending	4/30/10 9:19 PM		Custom Frequency	administrator	Private	History
Weekly Sales Report	/~administrator/Executive/Sales by Re	Pending	4/5/10 10:08 PM	5/31/10 9:08 PM	Repeats Weekly	administrator	Public	History
2013 job - weekly 12pm - APR to MAY	/~administrator/Revenue By Region.x	Pending	4/1/13 9:00 AM	5/31/13 9:01 AM	Repeats Weekly	administrator	Private	History
2012 job - notification on	/~administrator/Revenue By Region.x	Pending	4/2/12 12:00 PM		Single Job	administrator	Private	History
Annual Report - 2011 through 2015	/~administrator/parameters-REPORT.x	Pending	1/1/11 5:00 AM	1/2/15 5:00 AM	Repeats Annual	administrator	Private	History

Use the **Manage Report Jobs** page to:

- View future scheduled and recurring jobs for your private, shared, and public reports
- Select the time zone you wish to see the job times displayed in
- Refresh the display page to display recently submitted jobs
- Link to report history to view the output of completed job runs
- Delete a report job
- Suspend/Resume a report job
- View the job details

Viewing Jobs for a Specific Report

If you navigated to **Manage Report Jobs** from the context of a specific report, the jobs for that report will automatically display in the table with the following default filters applied:

- **Report Name** - equals the name of the report from which you launched the Manage Report Jobs page
- **Owner** - equals your user ID

- **Scope** - equals All (public and private jobs)
- **Status** - equals All (active and suspended jobs)

Use the following procedure to further filter the results.

Searching for Report Jobs

1. Enter values for the **Filter** criteria to search for a specific job or group of jobs.
2. Click **Search**. The jobs that meet the filter criteria will be displayed in the Report Jobs table.

The table displays general information about the job as well as the status.

You can sort the table by a particular column by clicking the column heading and selecting the up arrow or down arrow for ascending or descending.

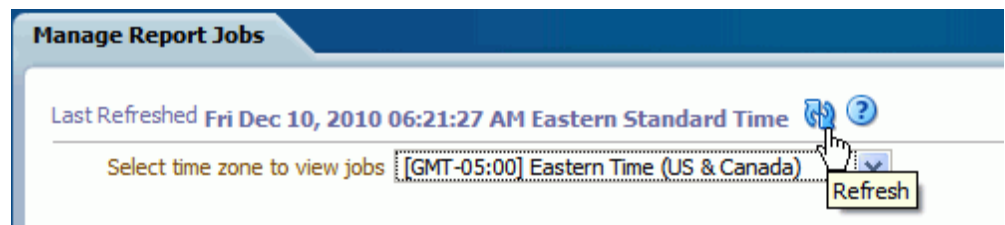
Possible status values are:

- **Active** - the job will run when the schedule event occurs.
- **Paused** - the job has been suspended. The report job will not run again until it has been resumed. Paused jobs will display when searching for **Suspended** jobs using the filter criteria.

Setting the Time Zone for Viewing Jobs

You can select the time zone for viewing the job start and end times.

1. Select the time zone from the list.
2. Click the **Refresh** button. The Report Jobs table will refresh displaying job start and end times in the selected time zone.



Viewing Job Details

1. Click the **Report Job Name** to view a detail page for the job.

2. To view delivery information for each output, click the expand icon next to the output name.
3. Click **Return** to return to the **Manage Report Jobs** page.

Linking to Job History

To view the completed runs of this job, click the **History** link in the table to launch the **Report Job History** page. For more information, see *Viewing and Managing Report History*, page 6-1.

Pausing Jobs

1. Select the job by clicking anywhere in the table row that lists the job information (except the job name link). You can select multiple jobs by pressing Ctrl + Shift and then clicking the additional rows. Deselect a row by clicking it again.
2. Click the **Pause** button. The status of the job will change to Paused.

Resuming Jobs

1. Select the job by clicking anywhere in the table row of the paused job (except the job name link). You can select multiple jobs by pressing Ctrl + Shift and then clicking the additional rows. Deselect a row by clicking it again.
2. Click the **Resume** button. The status of the job will change to Active.

Deleting Jobs


1. Select the job by clicking anywhere in the table row that lists the job information. You can select multiple jobs by clicking additional rows.
2. Click the **Delete** button.

Refreshing the Manage Report Jobs Page

1. To refresh the Manage Report Jobs page, click the **Refresh** button at the top of the page, as shown:

Manage Report Jobs

Last Refreshed **Fri Dec 10, 2010 06:21:27 AM Eastern Standard Time**  

Select time zone to view jobs 

Refresh

Viewing and Managing Report History

This chapter covers the following topics:

- Viewing Report Job History and Saved Output
- Viewing Job History for a Specific Report
- Searching for Report Job History
- Viewing Details of a Job History
- Downloading Data from a Report Job
- Republishing a Report from History
- Sending an Output to a New Destination
- Monitoring Running Jobs
- Canceling a Running Job
- Getting Error and Warning Information for Reports
- Deleting a Job History
- Refreshing the Report Job History Page

Viewing Report Job History and Saved Output

The **Report Job History** page displays information about running and completed report jobs. You can access this page and then search for the report job history; or, you can access this page from the context of a specific report.

To search for job history, navigate to this page in one of the following ways:

- From the Home Page: Under **Browse/Manage** click **Report Job History**
- On the global header: Click **Open**, and then click **Report Job History**

To access this page from the context of a specific report perform one of the following:

- From the catalog: Navigate to the report in the catalog and then click **Job History**
- From the report viewer, click **Actions** and then click **Job History**

The following figure shows the **Report Job History** page:

The screenshot displays the Oracle BI Publisher Enterprise interface for the 'Report Job History' page. At the top, there is a navigation bar with 'ORACLE BI Publisher Enterprise' and a search dropdown set to 'All'. The page title is 'Report Job History' and the user is signed in as 'administrator'. The page shows a 'Last Refreshed' timestamp of 'Wed Apr 07, 2010 10:50:45 AM Pacific Standard Time' and a time zone setting of '[GMT-08:00] Pacific Time (US & Canada)'. Below this is a 'Filters' section with several dropdown menus and input fields for filtering report jobs. The main area contains a table titled 'Report Job Histories' with a note '[33 Report Output Fetched]'. The table has the following columns: Report Job Name, Report Name, Status, Start Processing, End Processing, Owner, and Scope. The data rows are as follows:

Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
Daly Updates	Sales Dashboard with News.xdo	Running	04-06-2010 09:20:20 PM		administrator	Private
Executive Salaries	Employee Salary Report.xdo	Success	04-06-2010 09:01:30 AM	04-06-2010 09:01:54 AM	administrator	Private
Daly Updates	Sales Dashboard with News.xdo	Success	04-05-2010 09:20:20 PM	04-05-2010 09:20:25 PM	administrator	Private
Shipping Employee Salaries	Employee Salary Report.xdo	Success	04-05-2010 08:12:19 PM	04-05-2010 08:12:23 PM	administrator	Private
Sales by Region	Sales by Region.xdo	Failed	04-07-2010 11:04:07 AM	04-07-2010 11:04:08 AM	administrator	Private
Operations Salaries	Operations Salary Report.xdo	Success	04-07-2010 11:03:37 AM	04-07-2010 11:03:41 AM	administrator	Private

Use the **Report Job History** page to:

- View the status and details of running and completed report jobs
- Cancel a running job.
- Monitor a running job.
- View job submission details
- Download or view the XML data produced from the report (if you selected **Save Data** for the report)
- Download or view the report document (if you selected **Save output**)
- Republish the report data using other formats or templates (if you selected **Save Data** for the report)
- Delete report jobs from history

Viewing Job History for a Specific Report

If you navigated to the **Report Job History** page from the context of a specific report, the jobs for that report will automatically display in the table with the following default filters applied:

- **Report Path** - equals the path to the report from which you launched the Report Jobs History page
- **Start Processing** - equals to or later than one week ago.
- **Owner** - equals your user ID
- **Scope** - equals All Histories (Possible values for scope are: Public and Private job histories)
- **Status** - equals All (Possible values for status are: Success, Failed, Running, Has output errors, Canceled, Cancelling, Has output errors, and Has delivery errors)

Use the following procedure to further filter the results.

Searching for Report Job History

1. Enter values for the **Filter** criteria to search for a specific job history or group of completed report jobs. You can filter results based on the following:
 - **Report Job Name** - the name assigned to the job when it was submitted.
 - **Report Path** - the path to the report. If the report resides under Shared Folders, do not include "Shared Folders" in the path. If the report resides under "My Folders," the first node will equal your user name. For example, if you are logged in as Administrator and the report resides under "My Folders/Operational Reports", enter "~Administrator/Operational Reports".
 - **Schedule Context** - reserved for future use.
 - **Start Processing** - the date and time after which the request started processing.
 - **End Processing** - the date and time before which the request ended processing.
 - **Status** - can equal one of the following: Success, Failed, Running, Has output errors, Canceled, Cancelling, Has output errors, or Has delivery errors.
 - **Owner** - the user ID of the owner of the job
 - **Scope** - Public or Private

2. Click **Search**. The jobs that meet the filter criteria will be displayed in the Report Job Histories table.

The table initially displays 33 matching records. This number is displayed in the upper right corner of the table. Move the vertical scroll bar down to the lowest point to fetch 33 more records. The number displayed in the upper right corner updates to inform you of the number of records that have been fetched so far. You can continue fetching more records to the table in increments of 33 by moving the scroll bar down.

You can sort the table by a particular column by clicking the column heading and selecting the up arrow or down arrow for ascending or descending.

Viewing Details of a Job History

1. Click the **Report Job Name** to view a detail page for the job.

Generated Tue Apr 06, 2010 10:15:24 AM Pacific Standard Time Return

[-] **General Information**

General Information	Report Job Execution Information
Report Job ID 8152	Report Job Status ✔
Report Job Name Executive Salaries	Start Processing Time 4/6/10 10:01:30 AM PDT
Owner administrator	End Processing Time 4/6/10 10:01:54 AM PDT
Report Name Employee Salary Report	Time Elapsed 24.566 sec
Report Scope Private	
Report Job Schedule 4/6/10 10:01:27 AM PDT	
Active Start Date 4/6/10 10:01:27 AM PDT	
Active End Date	

[-] **Report Parameters**

Department 90
Employee All


[-] **Output & Delivery**






XML Data Republish

Status	Output Name	Template	Format	Locale	Time Zone	Calendar	Status	Send
	Output1	layout1	HTML	English (United States)	[GMT-08:00] Pacific Time (US & Canada)	Gregorian	✔	
	Output2	layout2	PDF	English (United States)	[GMT-08:00] Pacific Time (US & Canada)	Gregorian	✔	

2. To view delivery information for each output, click the expand icon next to the output name, as shown in the following figure:

Output & Delivery

XML Data 

Output Name	Template	Format	Locale	Time Zone	Calendar	Status	Send
Output1	Salary by Department	HTML	English (United States)	[GMT-08:00] Pacific Time	Gregorian		
Delivery 1: Email							
From: bipublisher-report@example.com							
To: managers@example.com							
Cc:							
Reply To:							
Subject: Department Salaries							
Last Updated: 5/24/10 9:59:54 PM PDT							
Status 							
Output2	Salary by Department	PDF	English (United States)	[GMT-08:00] Pacific Time	Gregorian		

3. Click **Return** to return to the **Report Job History** page.

Downloading Data from a Report Job

Note that for the data to be available, the **Save Data for Republishing** option must be enabled when the job is created. (For information on setting this option, see *About the Output Settings*, page 4-2.)

1. Click the **Report Job Name** to view the detail page for the job.
2. From the **Output & Delivery** region, click the XML Data download button.
3. When prompted, select the location to save the file.

Republishing a Report from History

Note that for the data to be available, the **Save Data for Republishing** option must be enabled when the job is created. (For information on setting this option, see *About the Output Settings*, page 4-2.)

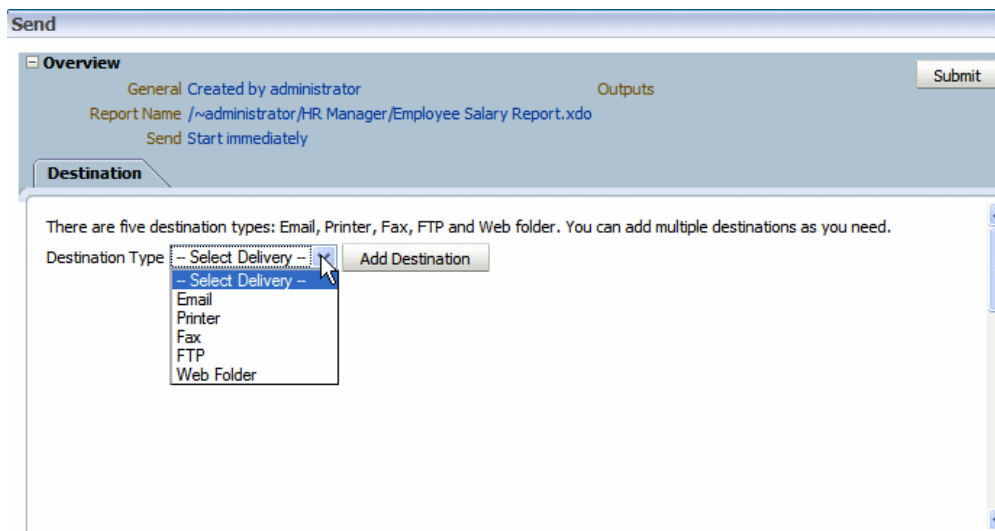
1. Click the **Report Job Name** to view the detail page for the job.
2. From the **Output & Delivery** region, click **Republish**. This launches the **Report Viewer**.
3. From the **Report Viewer** you can now apply a new layout, choose a different output type or export the report. Note that because you are using data that has already been retrieved, any parameters are not updateable.
4. To return to the **Report Job History** page, click the **Actions** menu and select **Return**.

Sending an Output to a New Destination

Note that for the output to be available from the history table, the **Save Output** option must be enabled when the job is created. For information on setting this option, see *About the Output Settings*, page 4-2.

Note: The send functionality does not create any history nor does it save the delivery status, it simply sends the output to the destination selected.

1. Click the **Report Job Name** to view the detail page for the job.
2. From the **Output & Delivery** region, locate the output that you wish to send to a new destination and click **Send**. This launches the **Send** dialog.



3. Select the delivery type and click **Add Destination**. Enter the appropriate fields for your delivery type.
4. When finished adding destinations, click **Submit**.

Monitoring Running Jobs

While a job is in running status, you can monitor the stages of the report processing,

To view the status, rest your cursor over the Running status indicator in the results table. The status will display as well as the instance ID of the cluster instance handling the processing. This is shown in the following figure:

ORACLE BI Publisher Enterprise Search: All Administration Help Sign Out

Report Job History Home Catalog New Open Signed In As administrator

Last Refreshed Wed Apr 07, 2010 10:50:45 AM Pacific Standard Time

Time Zone used for filters and display [GMT-08:00] Pacific Time (US & Canada)

Filters

Report Job Name Contains Start Processing Equals Or Later Owner Equals administrator

Report Path Contains End Processing Equals Or Earlier Scope All Histories

Schedule Context Contains Status All

Search Reset

Report Job Histories [33 Report Output Fetched]

Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
Daly Updates	Sales Dashboard with News.xdo	Running	04-06-2010 09:20:20 PM		administrator	Private
Executive Salaries	Employee Salary Report.xdo	Success	09:01:30 AM	09:01:54 AM	administrator	Private
Daly Updates	Sales Dashboard with News.xdo	Success	04-05-2010 09:20:20 PM	04-05-2010 09:20:25 PM	administrator	Private
Shipping Employee Salaries	Employee Salary Report.xdo	Success	04-05-2010 08:12:19 PM	04-05-2010 08:12:23 PM	administrator	Private
Sales by Region	Sales by Region.xdo	Failed	04-07-2010 11:04:07 AM	04-07-2010 11:04:08 AM	administrator	Private
Operations Salaries	Operations Salary Report.xdo	Success	04-07-2010 11:03:37 AM	04-07-2010 11:03:41 AM	administrator	Private

Once the page is loaded, the status will not be updated until you refresh the page.

The following table lists the processing stages of a job:

Processing Stage	Substages
Job Processor	<ul style="list-style-type: none"> Sending to Job Queue In job queue In job processor Job processor completed Job processor caused exception
Data Fetching	<ul style="list-style-type: none"> Fetching XML Data XML Data Fetched Before calling data model pre-trigger After calling data model pre-trigger Before calling data model post-trigger After calling data model post-trigger

Processing Stage	Substages
Fetching Bursting Control File (for bursting jobs only)	Fetching bursting control XML Bursting control xml fetched
Data Processor	In data processor Parsing control file (applies only to bursting jobs) Control file parsed (applies only to bursting jobs) Cutting data based on split key (applies only to bursting jobs) Data cutting completed (applies only to bursting jobs) Total sub-jobs (applies only to bursting jobs) Data processor completed
Report Processor Once the job reaches this stage, outputs can be viewed as they are completed by clicking the Report Job Name.	In report processor Rendering report document Report document rendering completed Report processor completed Error rendering report document
Delivery Processor The value of <delivery> may be e-mail, fax, File, FTP, Print, or WebDAV, depending on the destinations selected for the report.	In <delivery> processor Delivering to <delivery> processor Document delivered to <delivery> server <Delivery> processor completed

Canceling a Running Job

To cancel a running job:

1. Click anywhere within the table row for the report job to select it (except the job name link). You can select multiple jobs by pressing Ctrl + Shift and then clicking the additional rows. Deselect a row by clicking it again. Note that a job must be in **Running** status to cancel it.
2. Click the **Cancel running jobs** icon at the top of the table, as shown in the following figure:

Report Job Histories

Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
Operations	Employee Report.xdo	Running			administrator	Private
Executive Salaries	Employee Salary Report.xdo	Success	11-24-2010 03:38:08 PM	11-24-2010 03:38:41 PM	administrator	Private
Daily Updates	Sales Dashboard with News.xdo	Success	11-24-2010 03:33:57 PM	11-24-2010 03:34:30 PM	administrator	Private
Shipping Employee Salaries	Employee Salary Report.xdo	Success	11-24-2010 03:29:17 PM	11-24-2010 03:29:57 PM	administrator	Private

3. Click OK on the confirmation dialog.

Getting Error and Warning Information for Reports

If a report job fails or completes with warnings, you can view the message by resting your cursor over the error or warning status indicator in the results table. The message will display as shown in the following figure:

Report Job Histories

Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
Sales by Region	Sales by Region.xdo	Success	04-18-2010 09:20:19 PM	04-18-2010 09:20:21 PM	administrator	Private
Weekly Sales Report	Sales by Region.xdo	Failed	04-18-2010 09:08:53 PM	04-18-2010 09:08:54 PM	administrator	Public
Daily Updates	Sales Dashboard with News.xdc	Success	04-14-2010 09:20:20 PM	04-14-2010 09:20:25 PM	administrator	Private

BurstingJobprocessor.execute exception:Error getting data file or control file::Error getting bursting control xml.oracle.xdo.XDOException: oracle.xdo.XDOException: Could not get data source connection for: ABETAoracle.xdo.XDOException: Could not get data source connection for: ABETA at oracle.xdo.online.data.ClassicDataProcessor.process(ClassicDataProcessor.java:161) at oracle.xdo.servlet.ReportModelContextImpl.getReportXMLData(ReportModelC

For more complete diagnostic information on errors or warnings, you can view the diagnostic log files for the job in Oracle Fusion Middleware Control.

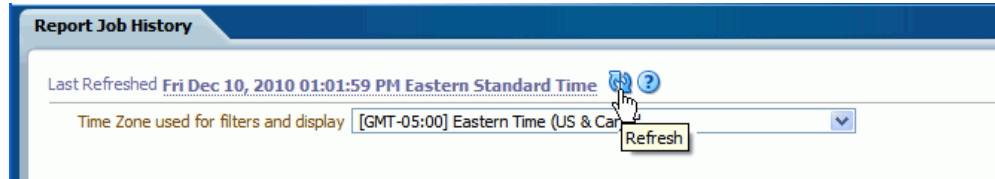
For details, see *Viewing Diagnostics for Report Jobs*, *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

Deleting a Job History

1. Click anywhere within the table row for the report job to select it. You can select multiple rows.
2. Click the delete icon at the top of the table.
3. Click **OK** on the confirmation dialog.

Refreshing the Report Job History Page

1. To refresh the **Report Job History** page, click the **Refresh** button at the top of the page, as shown:



Managing Objects in the BI Publisher Catalog

This chapter covers the following topics:

- What is the Catalog
- What Objects Are Stored in the Catalog
- Creating a Folder or Subfolder
- Performing Tasks on Catalog Objects
- Downloading and Uploading Catalog Objects
- Understanding the Impact of Taking Actions on Objects Referenced by Reports
- Exporting and Importing Catalog Translation Files

What is the Catalog

Note: The information in this chapter applies to installations of BI Publisher that are not integrated with the Oracle Business Intelligence Enterprise Edition. For information about the integrated Oracle BI Presentation catalog, see the *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

The Oracle BI Publisher catalog stores the objects, such as reports, data models, and style templates, that you create using Oracle BI Publisher. Users have their own personal folders (My Folders) where they can store their objects. The objects that are stored in personal folders can only be accessed by the user who created and saved the content into the folder. Users can add subfolders to their My Folders to organize their content in the way that is the most logical to them.

Users can also store objects in shared folders where other users or groups can access the objects. User permissions determine which folders are available to which users. Permissions are assigned at the object-level and determine who has the ability to view,

edit, and schedule objects within that folder. Your administrator creates and maintains the catalog's shared folder structure.

What Objects Are Stored in the Catalog

The following objects are shown in the catalog:

Folders

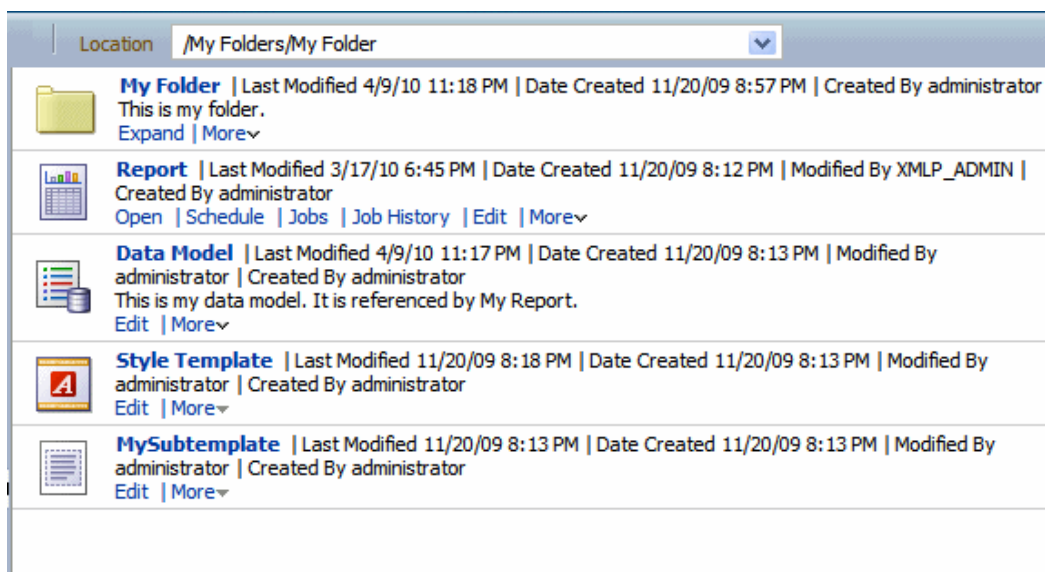
Reports

Data Models

Style Templates

Sub Templates

As shown in the following figure, each object has an identifying icon and lists the creation and modification information. If a description was provided for the object, that is also displayed in the catalog. Next to each object in the catalog is a list of actions you can take on the object.



See Performing Tasks on Catalog Objects, page 7-3 for more information.

Creating a Folder or Subfolder

Use the following procedure to create a subfolder within your My Folder or, if you have the required permissions, create a shared system folder.

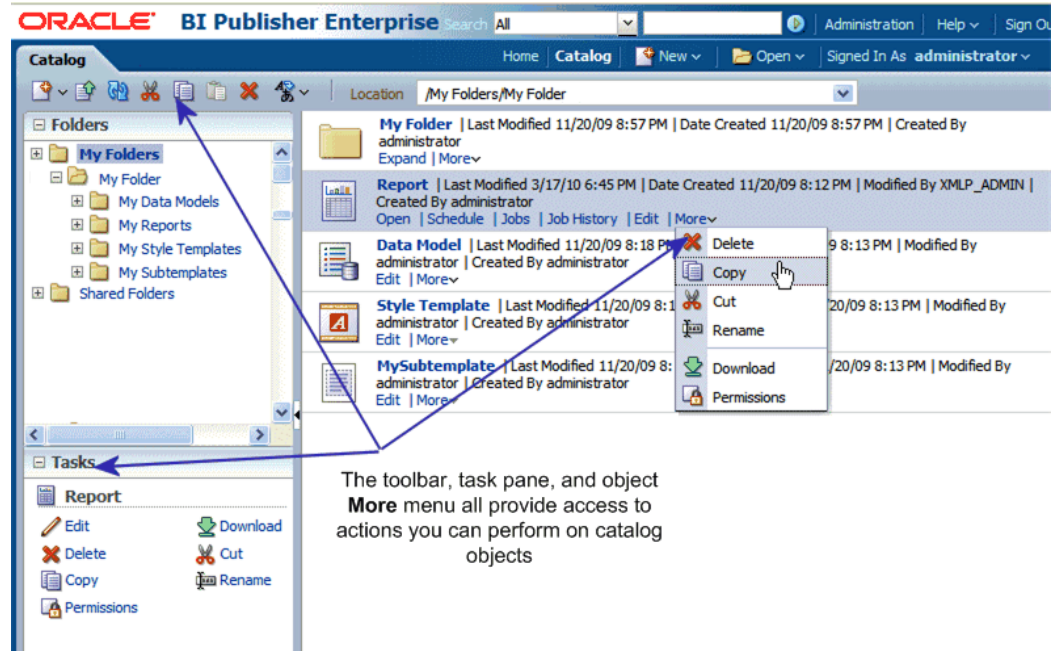
1. Navigate to the desired location in the Folders pane.
2. On the catalog toolbar, click **New** and select **Folder**. The **New Folder** dialog is

displayed.

3. Enter the folder name and optionally enter a description. Click **Create**.

Performing Tasks on Catalog Objects

Some tasks can be performed on objects in multiple ways: by using the links next to the object, by using the catalog toolbar, or by selecting the object and choosing the task from the Tasks region, as shown in the following figure:



Note that your access to these actions will depend on the permissions granted to you by your administrator.

Task options include:

- **Edit** - opens the object in the appropriate editor or builder.
- **Copy** - duplicates a folder or object. To paste the object in a different folder, navigate to the folder location and click **Paste** to place the copied item in the desired folder. To paste a copy of the item into the same folder, click **Paste**. The copied object will be renamed with the prefix "Copy_of_".
- **Cut** - cuts the item from the current location. To paste the object in a different folder, navigate to the folder location and click **Paste** to place the cut item in the desired folder.
- **Delete** - removes a folder or object that from the catalog.

- **Download** - creates an archive file of the object that you can save to a selected location. See *Downloading and Uploading Catalog Objects*, page 7-4. This option is not available for folders.
- **Rename** - renames a folder or object.
- **Permissions** - sets object-level permissions. See *About Catalog Permissions, Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher* for more information.

Folders also include the following tasks:

- **Expand** - displays the folder contents.
- **Paste** - pastes a cut or copied object into the selected folder.
- **Upload** - uploads an archived object to the folder. See *Downloading and Uploading Catalog Objects*, page 7-4
- **Properties** - edits the description of the folder.

Downloading and Uploading Catalog Objects

The download feature of the BI Publisher catalog enables you to bundle and download multicomponent objects (such as reports) in an archive file. You can then use the upload feature to unarchive the data to another location in the catalog. This process enables you to transfer objects across environments. For example, you can use this feature to transfer BI Publisher objects from a development environment to a production environment.

The following table shows the file extensions that BI Publisher assigns to each type of archived object when downloaded:

Catalog Object	Extension Assigned to Downloaded Files
Report	.xdoz
Data Model	.xdmz
Style Template	.xssz
Subtemplate	.xsbz

Note: If BI Publisher is integrated with the Business Intelligence Enterprise Edition, use the archive and unarchive features of the BI

Presentation catalog to perform this function. See "Managing Objects in the Oracle BI Presentation Catalog" in the *Oracle Fusion Middleware User's Guide for Business Intelligence Enterprise Edition* for more information.

Understanding the Impact of Taking Actions on Objects Referenced by Reports

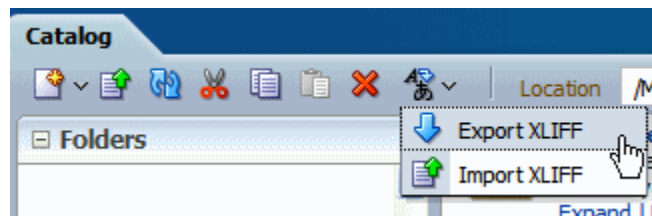
Note that when you move, cut, rename, or delete a Data Model, a Sub Template, or a Style Template that is being used as a resource for a report, that the references to the resource will be broken and the report will no longer run as expected.

For example, if you have a report that was created with a data model that resides in a folder called My Data Models, if you move the data model to another folder, the report will not run because the report definition is expecting the data model to be in My Data Models.

If moving a resource object is unavoidable, then you must edit each report that references the object to refer to the object in its new location.

Exporting and Importing Catalog Translation Files

For users with administrator privileges, the catalog toolbar includes the Export XLIFF and Import XLIFF function shown in the following figure:



This function enables administrators to export an XLIFF file that contains the translation strings the selected catalog object or group of objects. The XLIFF strings can then be translated to the desired target language. After the XLIFF file is translated, the administrator can import the XLIFF file back to the catalog and assign it the appropriate locale.

For more information, see Translating Catalog Objects, *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

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