JD Edwards World

Business Intelligence Publisher for JD Edwards World Guide

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Preface

Welcome to the JD Edwards World Business Intelligence Publisher for JD Edwards World Guide.

Audience

This guide is intended for implementers and end users of JD Edwards World Business Intelligence Publisher for JD Edwards World.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

You can access related documents from the JD Edwards World Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 1362397.1, or by using this link:

- https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=1362397.1

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.

Convention	Meaning
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Overview to Business Intelligence Publisher for JD Edwards World

This chapter contains these topics:

- Section 1.1, "Objectives"
- Section 1.2, "About BI Publisher"

1.1 Objectives

- To create a report with a simple SQL statement to obtain sample data
- To use the sample data to create an XML file and upload it to Microsoft Word
- To utilize the Microsoft Word Plug-in to choose fields from the XML file to create a template
- To upload the template to Business Intelligence Publisher Enterprise (BI Publisher)
- To execute the SQL statement and produce a report that uses the template

1.2 About BI Publisher

Oracle BI Publisher is an enterprise reporting solution that allows you to author, format, manage, and deliver all types of documents, eliminating the need for costly print solutions. You can easily design the layout of a report using familiar desktop tools, which dramatically reduces the time and costs to develop and maintain reports.

BI Publisher integrates with JD Edwards World to enhance reporting capabilities. You can leverage BI Publisher to suit your business needs for ad hoc reports that can include special formatting and images. BI Publisher allows you various delivery options, including email, fax, and HTML.

See Also:

- *JD Edwards World Business Intelligence Publisher for JD Edwards World Guide* that Oracle includes when you download BI Publisher Oracle's E-Delivery Web site.

BI Publisher includes the following tasks:

- Set Up BI Publisher
- Create a Report

2

Set Up BI Publisher

This chapter contains these topics:

- Chapter 2.1, "Before You Begin"
- Chapter 2.2, "Downloading and Installing BI Publisher Desktop"
- Chapter 2.3, "Setting up BI Publisher Enterprise and JDBC Driver Connection"
- Chapter 2.4, "Downloading and Installing Oracle Database XE (Optional)"
- Chapter 2.5, "Downloading and Installing mySQL (Optional)"

Prior to creating reports using BI Publisher, you must download and set up the following on your system:

1. BI Publisher Enterprise

   This is the user interface for creating, running, and scheduling reports, and you install this on a Java based application server. You must download and install BI Publisher and an OC4J application server. If you prefer to install with a different application server, use the Manual Installation section for your application server in the Oracle Business Intelligence Publisher Installation Guide, which is in the download.

   Access Oracle's E-Delivery website using the following URL and follow the instructions to download and install BI Publisher: http://edelivery.oracle.com/.

2. BI Publisher Desktop

   This contains a MS Word plug-in to create report templates and you install it on the PC of every one that develops reports.

3. JD Edwards World JDBC Driver

The driver is a software component that allows Java applications, such as BI Publisher, to access the JD Edwards World database. It connects Enterprise to the iSeries so that report data is up-to-date. See the JD Edwards World Java Database Connectivity Guide for more information.

To download the JD Edwards World JDBC Driver, which includes the JD Edwards World Java Database Connectivity Guide, access MyOracle Support, choose Patches and Updates and the choose the JD Edwards products link. On Update Center, choose JD Edwards World Downloads in the Type field, enter JDBC1.1 in the Search for field and click SEARCH. Continue by downloading the item in the Download Basket.

After you set up the JD Edwards World JDBC Driver, you must then set up the BI Publisher and JDBC Driver Connection.

Additionally, your system must contain a database for scheduling reports and other tasks. If you do not have a database to use for scheduling reports, you can optionally

download and install the Oracle Database 10g Express Edition (Oracle Database XE) or the mySQL relational database management system. This an entry-level, small-footprint database that is based on the Oracle Database 10g Release 2 code base that is fast to download; free to develop, deploy, distribute; and simple to administer. See Downloading and Installing Oracle Database XE or Downloading and Installing mySQL for more information.

Setting up BI Publisher includes the following:

- Downloading and Installing BI Publisher Desktop
- Setting up BI Publisher Enterprise and JDBC Driver Connection

2.1 Before You Begin

Ensure that Microsoft Word is not running.

2.2 Downloading and Installing BI Publisher Desktop

After you install BI Publisher and launch Microsoft Word, notice the Oracle BI Publisher menu.

To download and install BI Publisher Desktop

1. Copy and paste the following into your internet browser address field:

   http://edelivery.oracle.com/.

2. Choose the appropriate language or click Continue.
3. Complete the fields on Export Validation and click Continue.
4. Choose Oracle Business Intelligence in the Select a Product Pack field and Microsoft Windows (32-bit) in the Platform field.
5. Click Go.

   A list of the results displays in the lower area of the screen.

6. Select the latest version of the Oracle Business Intelligence Media Pack for Microsoft Windows (32 bit) and click Continue.
7. Locate the latest version of Oracle Business Intelligence Publisher Desktop for Microsoft Windows.
8. Download and extract the contents of the zip file to a folder.
9. Locate the following download folder and double-click the BIPublisherDesktop.exe file:

   \Windows\Server_Ancillary\Oracle_Business_Intelligence_Publisher\BI_Publisher_Desktop\

10. Follow the prompts in the file.

2.3 Setting up BI Publisher Enterprise and JDBC Driver Connection

Setting up BI Publisher Enterprise and JD Edwards World JDBC Driver includes the following tasks:

- To set up BI Publisher Enterprise and JDBC Driver connection
- To test the JDBC connection

To set up BI Publisher Enterprise and JDBC Driver connection

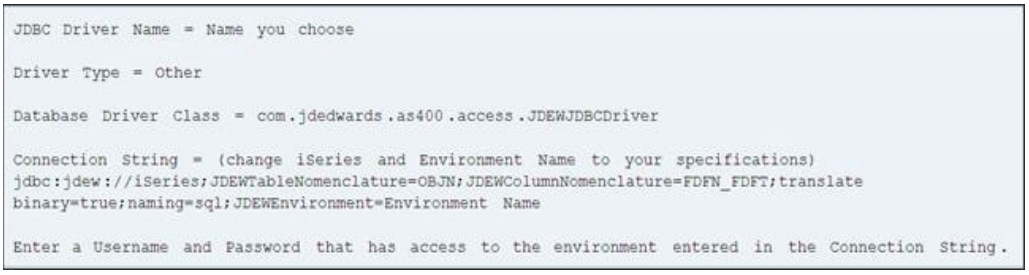
After you install the JD Edwards World JDBC Driver, JD Edwards recommends that you reboot the OC4J server.

To set up the BI Publisher Enterprise and JDBC Driver connection, you need the name of your Systemi, the JD Edwards World Environment name to which you want to connect, and the user name and password to directly access JD Edwards World with J98INIT or J98INITA.

1. From the Windows Toolbar, choose Start, Programs, Oracle BIPHome1, and then Start BI Publisher.
2. After initialized displays in the BI Publisher command window, perform one of the following:
   - From the Windows Toolbar, choose Start, Programs, Oracle BIPHome1, and then BI Publisher Server.
   - Copy and paste the following into your internet browser address field and then change the Server Name:

     http://ServerName.com:9704/xmlpserver.
3. Sign in by entering Administrator in the User Name and Password fields.
4. On the BIP console, click the Admin tab, and then click the JDBC link under Data Sources.
5. Click Add Data Source.
6. Complete the following fields:
   - JDBC Driver Name
   - Driver Type
   - Database Driver Class

Figure 2–1 Example of screen with Driver Name, Type, and Database Driver Class



7. Click Apply to save your changes.
8. Click Test Connection to verify a valid connection to your environment.

   You receive the message: Connection established successfully.

To test the JDBC connection for Adopted Authority

If you use Adopted Authority, you need to ensure that the individuals using the JDBC Driver have access to the QJDF data area. After you grant the JDBC users access to the QJDF data area, you must test the JDBC connection.

1. Log out.
2. Close the BI Publisher administrative console.

3. Stop and restart the BI Publisher server.
4. Launch the administrative console to test the JDBC connection.

2.4 Downloading and Installing Oracle Database XE (Optional)

BI Publisher is an Oracle product that you can use in conjunction with JD Edwards World software. You must use a Windows based scheduler database and application server with BI Publisher. If you do not have a database, you can download and install Oracle Database XE that includes scheduling functionality.

You can install Oracle Database XE on any size host machine with any number of CPUs (one database per machine), and XE stores up to 4 gigabyte (GB) of user data, use up to 1 GB of memory, and use one CPU on the host machine.

When you install Oracle XE, the system prompts you to create a DB administrator user ID and password. You then create a new BI Publisher user for the scheduler connection in BI Publisher.

To download and install Oracle Database XE

1. Copy and paste the following into your internet browser address field:

   http://www.oracle.com/technology/software/products/database/xe/index.html
2. On Oracle Database 10g Express Edition Downloads, click the appropriate Oracle Database 10g Express Edition link.
3. Select the Setup.exe file and follow the prompts to perform the installation.
4. Copy and paste the following into your internet browser address field to access Oracle Database XE:

   http://127.0.0.1:8080/apex
5. Log in using your new DB administrator user ID and password.
6. Select the Administration tab and then the Database Users link.
7. Select Create to create a new user ID and password.
8. Select DBA and then select Check All to create User Privileges.
9. Click Create to finish.
10. Access the BI Publisher Enterprise server to setup the scheduler database.
11. Access the Admin tab and select Scheduler Configuration.
12. Enter Oracle 10g in the Database Type field.
13. Enter jdbc:oracle:thin:@ServerName.com:1521:xe in the Connection string field.
14. Enter bip in the Username and Password fields.
15. Enter oracle.jdbc.OracleDriver in the Driver Class field.
16. Click Apply.
17. Log out and log in.
18. Click Test Connection.
19. Click Install Schema.
20. Schedule a report or send an e-mail with a report to test the scheduler database.

Following are examples of a JDBC connection for the Oracle database to use the scheduling functionality.

- Connection String: jdbc:oracle:thin:@ db-pc-name.company.com:1521:xe
- Driver Class: oracle.jdbc.OracleDriver

2.5 Downloading and Installing mySQL (Optional)

BI Publisher is an Oracle product that you can use in conjunction with JD Edwards World software. You must use a Windows based scheduler database and application server with BI Publisher. If you do not have a database, you can download and install mySQL that includes scheduling functionality.

To download and install mySQL

1. Copy and paste the following into your internet browser address field to download the JAR (driver):

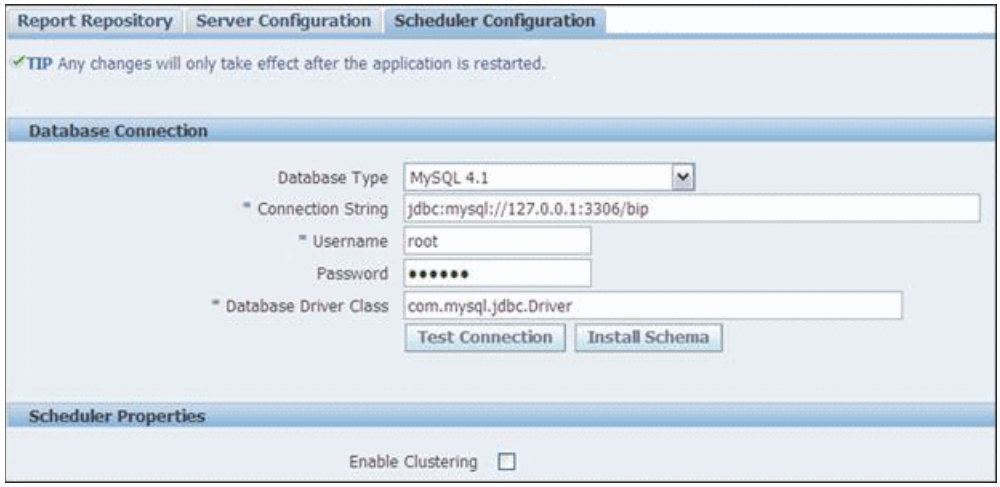
   http://dev.mysql.com/get/Downloads/Connector-J/mysql-connector-java-5.1.7.zip/from/http://mysql.he.net/

2. Locate mysql-connector-java-5.1.7.zip and then locate mysql-connector-java-5.1.7-bin.jar.
3. Extract this file to the same location as the JD Edwards World and the IBM JT400 Jar files.

   For example: C:\OraHome_2\oc4j_bi\j2ee\home\applib.

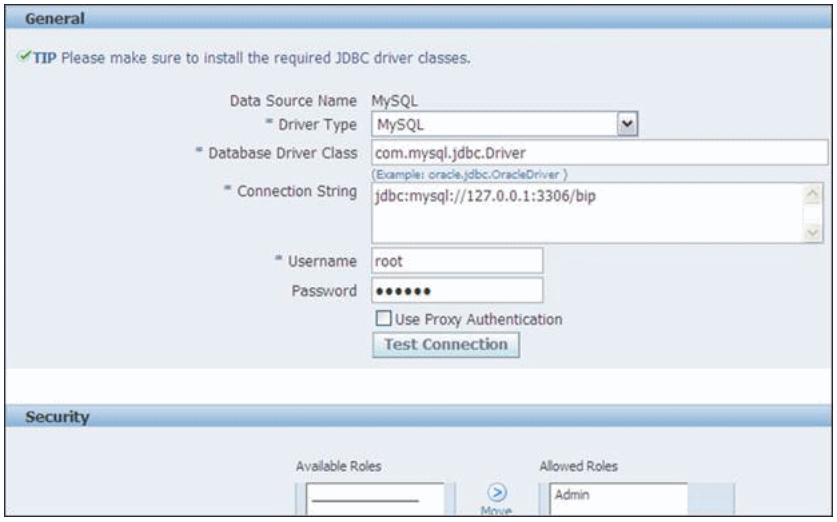
4. Stop and start the BI Publisher server.
5. Log in to BI Publisher, select the Admin tab, and then the Scheduler link.
6. On Scheduler Configuration, complete the following field:
   - Database Type
7. Enter jdbc:mysql://127.0.0.1:3306/bip in the Connection String field.
8. Enter root in the User Name field.
9. Complete the following field:
   - Password
10. Enter com.mysql.jdbc.Driver in the Database Drive Class field and click Apply.

Figure 2–2 Scheduler Configuration Window



11. On General, click Test Connection.

Figure 2–3 General Window



3

Create a Report

This chapter contains these topics:

- Chapter 3.1, "Selecting the Data"
- Chapter 3.2, "Formatting the Report"
- Chapter 3.3, "Adding a Template to the Report"

Using Oracle BI Publisher, you can create, format, manage, and deliver all types of documents, which eliminates the need for costly print solutions. You can easily design the layout of a report using familiar desktop tools, which dramatically reduces the time and costs to develop and maintain reports.

Creating a report includes the following tasks:

- Selecting the Data
- Formatting the Report
- Adding a Template to the Report

3.1 Selecting the Data

To create a report from an SQL statement, you must choose the data that you want in the report. After you choose the data, you can then perform the following:

- View the results in the report
- Edit the data for the report
- Export the data

3.1.1 Before You Begin

- Start the application server.
- Start the BI Publisher Enterprise server and sign in.

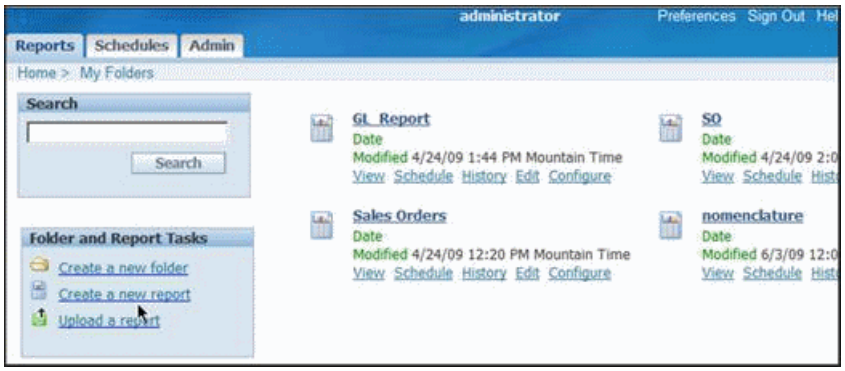
To select the data

1. On the Reports tab on Oracle BI Publisher Enterprise, click My Folders.

Figure 3–1 Reports Tab on Oracle BI Publisher Enterprise

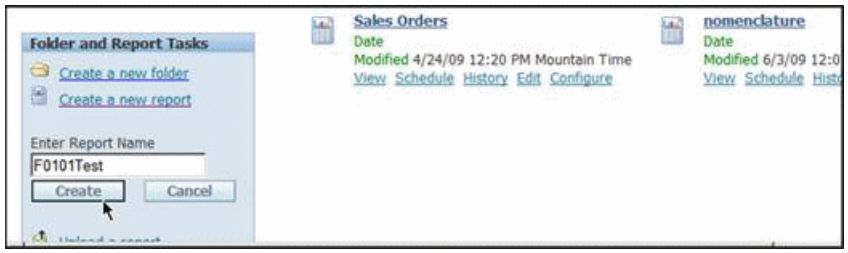
2. Click Create a new report.

Figure 3–2 Reports Tab Showing the Create a New Report Link



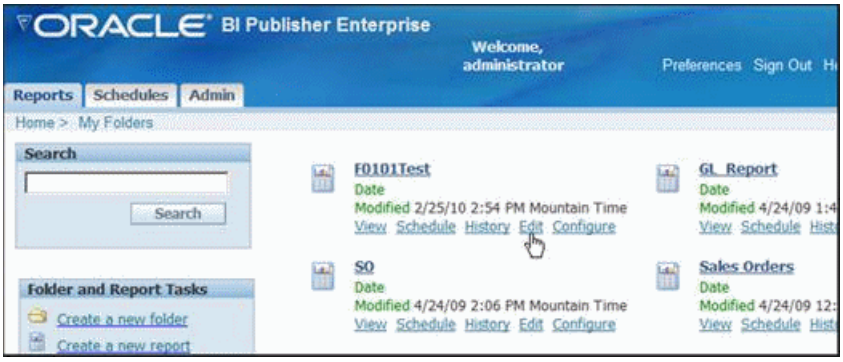
3. Complete the following field:
   - Enter Report Name

Figure 3–3 Enter Report Name Field



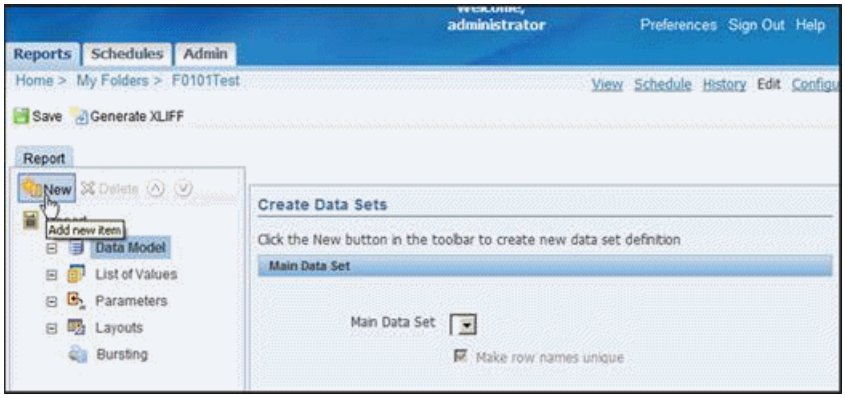
4. Click Create.
5. Locate the report and click Edit.

Figure 3–4 Report Edit Link



6. Click Data Model and then click New.

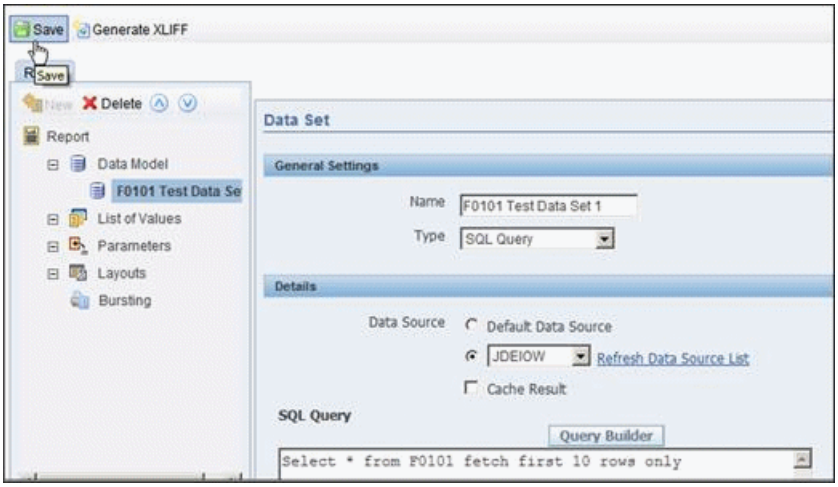
Figure 3–5 Locations for the Data Model Menu and New Button on the Reports Tab



7. Complete the Name field under General Settings or accept the default value of New Data Set 1.
8. Choose SQL Query for the Type field.
9. Choose a Data Source under Details.
10. Complete the SQL Query field.

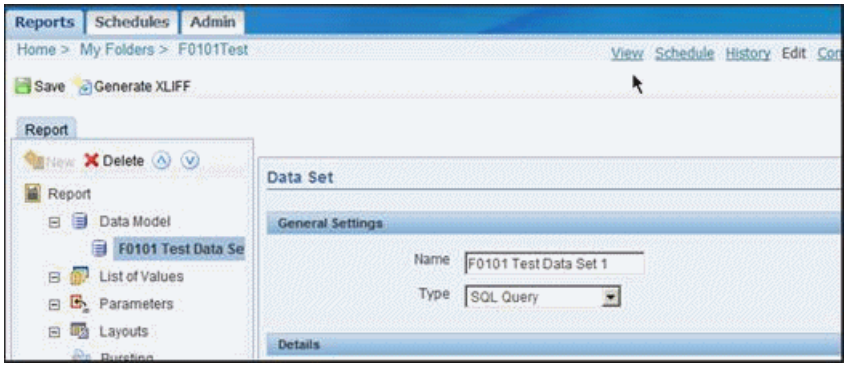
    For example, you might enter Select * from F0101 fetch first 10 rows only. This query selects all of the fields in the Address Book Master table (F0101) and the first 10 rows or records of data.
11. Click Save.

Figure 3–6 Example of Complete SQL Query Field



12. Click View.

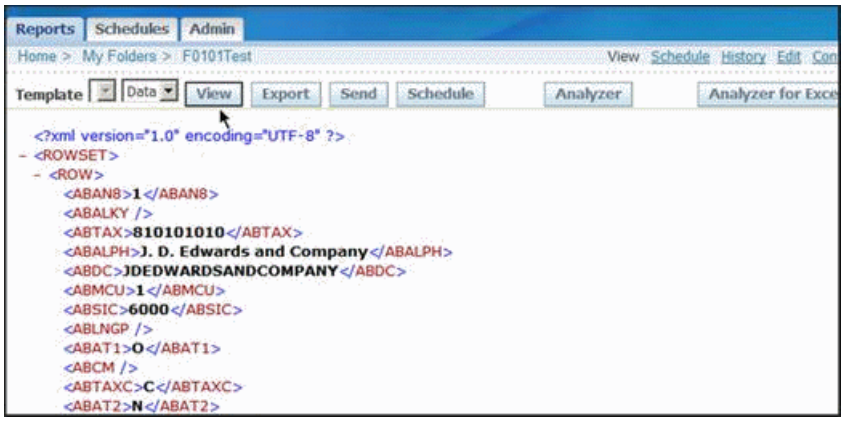
Figure 3–7 Location of the View Link on the Reports Tab



13. Click View to review the results of the query.

The data displays in XML, which is the format the Microsoft Word add-on uses to create report templates.

Figure 3–8 Example of Search Query Results in XML



14. Click Export to export the XML data to a PC.

15. On the File Download window, click Save.
16. On the Save As window, ensure the file extension is .xml and then navigate to the folder where you want to store the file.
17. Click Save.

    If you want to add a template to the report, do not close the report.

3.2 Formatting the Report

After you create the report, you can import the XML data into Microsoft Word and use the formatting features for Oracle BI Publisher.

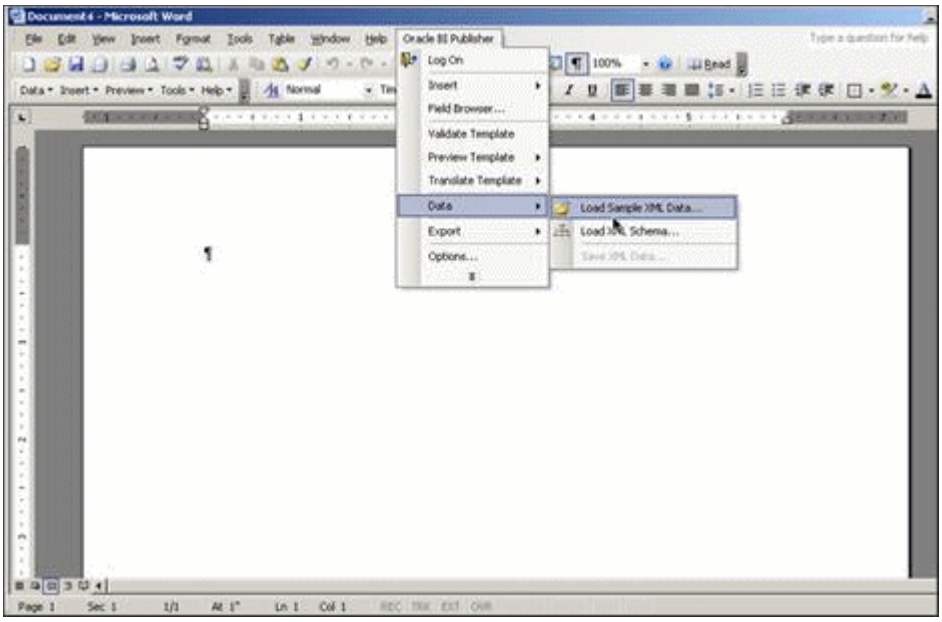
3.2.1 Before You Begin

- Open Microsoft Word and open a new blank document.

To format the report

1. On a new blank document, click Oracle BI Publisher, Data, and then Load Sample XML Data from the menu.

Figure 3–9 Microsoft Word Menu Navigation to "Load Sample XML Data" Command



2. Locate the report file in the XML format and then click Open.

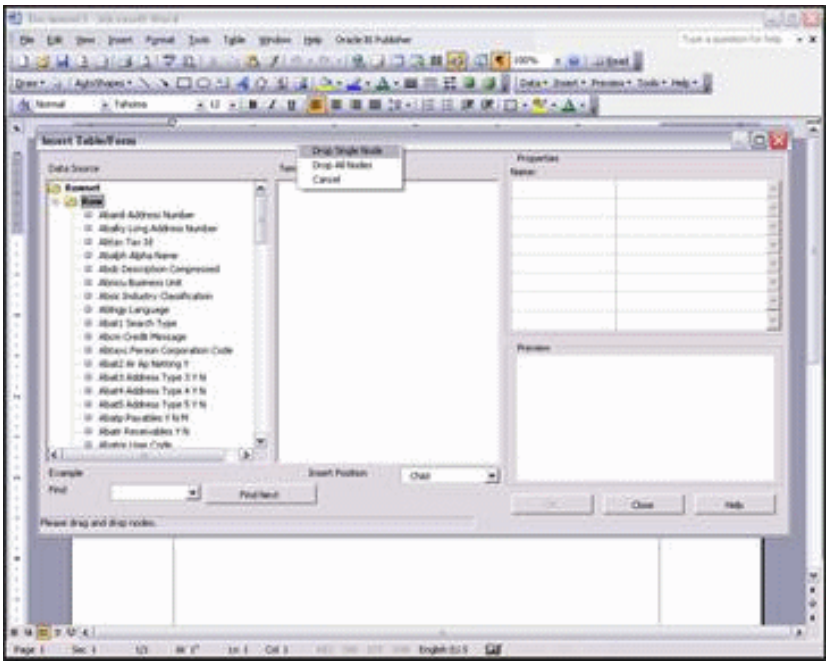
   A window displays a message that the data loaded successfully.
3. Click OK.
4. Click Oracle BI Publisher, Insert, and then Table/Form from the menu.

   The Insert Table/Form window displays. The Data Source column contains the fields from the file.
5. Select Row at the top of the list.
6. Drag Row and drop it in the Template column.

   When you drop Row in the Template column, a small menu displays.

7. Click Drop Single Node.

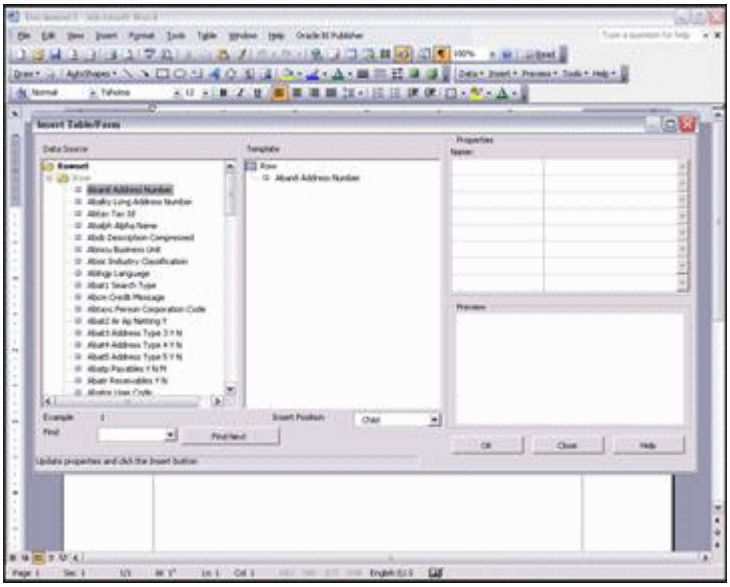
Figure 3–10 The Drop Single Node Menu



8. Select a field in the Data Source column, drag it over Row, and drop it in the Template column.

   For example, select the Aban8 Address Number field and drag it on top of Row. Release the mouse button. Aban8 Address Number displays under Row in the Template column.

Figure 3–11 Example of Insert Table Form screen

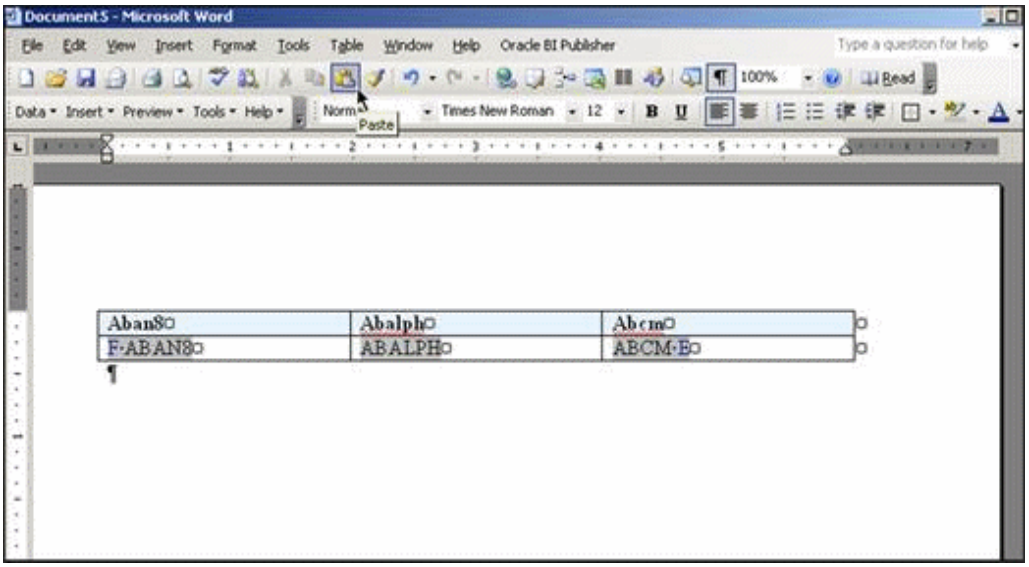


9. Continue to select fields in the Data Source column, drag them over Row and drop them in the Template column.

10. Click OK.

    The new blank document contains a table with these fields in the header row of the template.

Figure 3–12 Example of Document with Table Header Rows



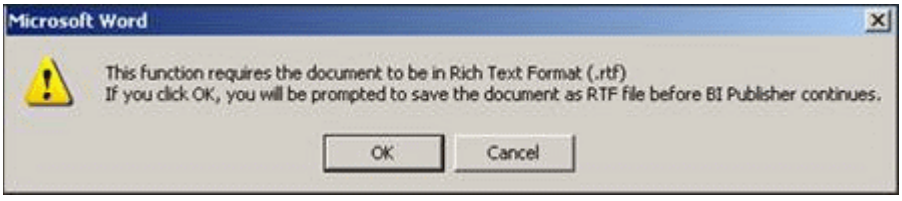
11. Edit the field names in the header row to be more descriptive.
12. Change any of the formatting for the report for it to display as you want.

    Use the Microsoft Word features to change the font type, size, color, shading, borders, and so forth.

13. Click the Oracle BI Publisher menu, Preview Template, and then PDF to view the report template with your data.

    The system prompts you to save the template.

Figure 3–13 Save Prompt Window



14. Click OK.

    On the Save As window, ensure the file extension is .rtf (Rich Text Format) and then navigate to the folder where you want to store the template.

15. Click Save.

    The report displays in PDF format. .

16. Click File, and then Exit to close the PDF version of the report.
17. Click File and then Exit to exit Microsoft Word.

3.3 Adding a Template to the Report

After you create the template in Microsoft Word, you upload the template to the report in BI Publisher. You then modify the SQL statement to select and sort the data that displays on the report.

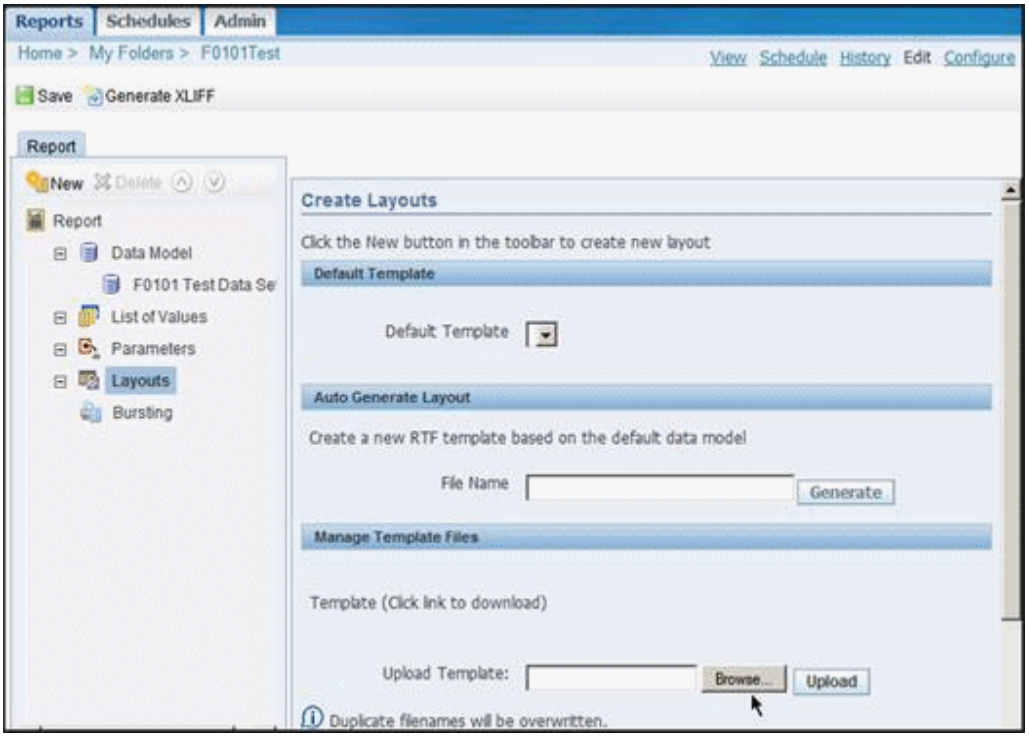
To add a template to the report

1. Return to BI Publisher Enterprise and perform one of the following:
   - If the report is open, click Edit.
   - If the report is not open, access My Folders, locate the report and then click Edit.

Figure 3–14 Location of Edit Link on Report

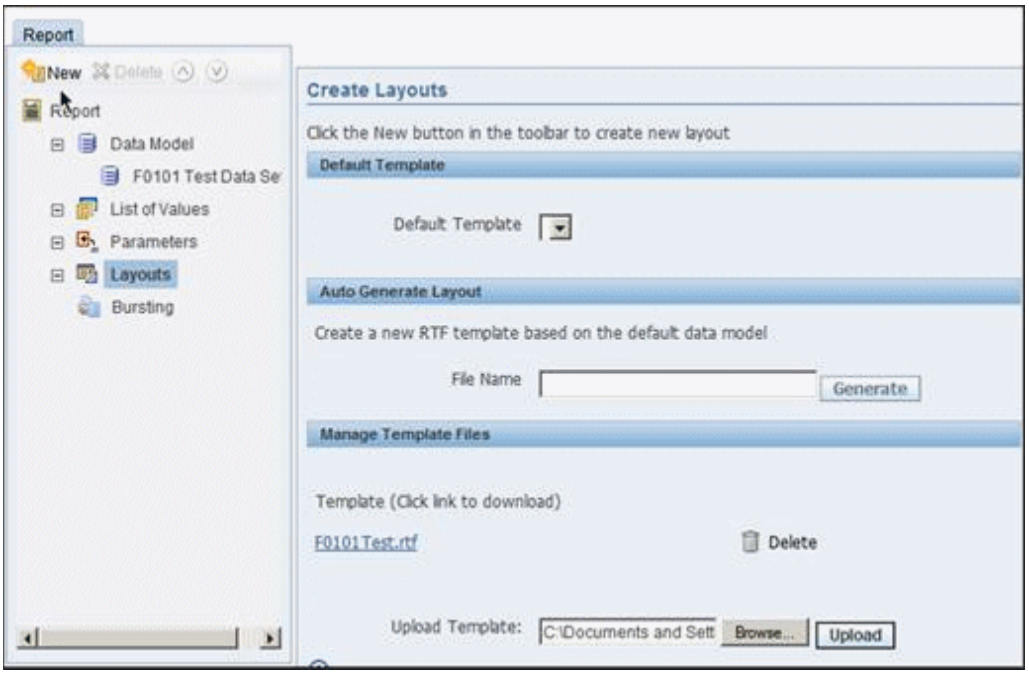
2. Click Layouts.
3. Under Manage Template Files, click Browse.

Figure 3–15 Location of Browse Button



4. On the Look in window, locate the template with the .rtf file extension.
5. Select the template and click Open.
6. On Oracle BI Publisher Enterprise, click Upload.

Figure 3–16 Location of Upload Button



7. Click View.

The report processes and then displays in HTML format because HTML displays at the top of the format list.

8. From the Format list, choose the format you want and click View.
9. The report processes and displays in the format and template you choose.
10. Click Sign out when you finish.

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