

# Oracle® Analytics

## Designing and Publishing Pixel-Perfect Reports in Oracle Analytics Server



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Primary Author: Hemala Vivek

Contributing Authors: Pete Brownbridge, Nick Fry, Rosie Harvey, Christine Jacobs, Stefanie Rhone, Jenny Smalling

Contributors: Oracle Analytics Server development, product management, and quality assurance teams

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# Preface

Learn how to model data and design pixel-perfect reports.

## Topics:

- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Resources](#)
- [Conventions](#)

## Audience

This document is intended for data modelers and report designers for creating pixel-perfect reports.

## 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 customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## Related Resources

For a full list of guides, refer to the Books tab on Oracle Analytics Server Help Center.

# Conventions

This document uses the standard Oracle text and image conventions.

## Text Conventions

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

## Videos and Images

Skins and styles customize the look and feel of Oracle Analytics Cloud, dashboards, reports, and other objects. Videos and images used in this guide may not have the same skin or style that you're using, but the behavior and techniques shown are the same.

# Part I

## Model Data for Pixel-Perfect Reports

This part describes how to model data for pixel-perfect reports.

### Topics:

- [Use the Data Model Editor](#)
- [Create Datasets](#)
- [Structure Data](#)
- [Add Parameters and Lists of Values](#)
- [Add Event Triggers](#)
- [Add Flexfields](#)
- [Add Bursting Definitions](#)
- [Add Custom Metadata for Oracle WebCenter Content Server](#)
- [Performance Best Practices](#)

# 1

## Use the Data Model Editor

This topic describes the components and features supported by the data model editor.

### Topics:

- [What is a Data Model?](#)
- [Components of a Data Model](#)
- [Features of the Data Model Editor](#)
- [About the Data Source Options](#)
- [Process Overview for Creating a Data Model](#)
- [Launch the Data Model Editor](#)
- [Data Model Properties](#)
- [Manage Private Data Sources](#)

## XML Data Chunking

XML data chunking supports distributed processing.

XML data chunking is suitable for large and long-running reports. If the administrator selects the **Enable Data Chunking** runtime property at the instance level, you can enable XML data chunking for individual data models, reports, and scheduled jobs.

In a data model, if you click **Chunking**, select **Enable Chunking**, and then specify an attribute in the **Split By** field, the data model pre-processor uses the split key to split large amounts of XML data into several chunks of data of manageable size.

Before you enable XML data chunking, understand its limitations and recommended usage.

XML data chunking:

- Is best suited for listing reports using a table and with no cross-references.
- Supports sorting, grouping, aggregation, and cross-referencing operations only within the individual chunked output. The merged output doesn't support these data operations.
- Adds page numbers to the PDF pages of the merged output. In the report template, remove the page numbering element to avoid duplicate or overlapping page numbers in the PDF output.
- Supports running totals, and other functions only within the individual chunked output, and each is reset with each chunked output.
- Supports only RTF, XPT, and eText, and XSL templates.
- Supports only PDF, XLSX, and Text output formats.
- Doesn't support multiple output formats. If you select XML chunking for a scheduled job, multiple outputs aren't allowed.
- Isn't supported for online reports.

- Isn't supported for bursting jobs.

## Manage Private Data Sources

Data model developers can create and manage private JDBC, OLAP, web service, and HTTP data source connections without having to depend on an Administrator user. However, Administrator users can still view, modify, and delete private data source connections, if needed.

Private data source connections are identified by the word (Private) appended to the end of the data source name. For example, if you create a private JDBC connection called My JDBC Connection, it's displayed as My JDBC Connection (Private) in the data source drop-down lists.

1. Launch the data model editor.
  - To create a new data model, from the header or from the Home page, click **Create**, and then click **Data Model**.
  - To edit a data model, select the data model in the Catalog, and open the data model in the data model editor.
2. From the data model editor toolbar, click **Manage Private Data Sources**.
3. Select the connection type tab, and click **Add Data Source**.

If you are logged in as an Administrator, the dialog displays all the data source connections; however, you can only create or modify JDBC, OLAP, HTTP, and web service data sources from this dialog.
4. Enter the private connection name, and the connection information.
5. Click **Test Connection**. A confirmation is displayed.
6. Click **Apply**. The private data source connection is now available for use in your datasets.

## What is a Data Model?

A data model is an object that contains a set of instructions to retrieve and structure data for a pixel-perfect report. Data models reside as separate objects in the catalog.

A data model can be simple with one data set retrieved from a single data source, for example, the data returned from the columns in the employees table, or can be complex with parameters, triggers, and bursting definitions and using multiple data sets.

Use the data model editor to build a data model.

## Components of a Data Model

A data model supports the following components:

- Dataset

A dataset contains the logic to retrieve data from a single data source. A dataset can retrieve data from a variety of data sources (for example, a database, an existing data file, a web service call to another application, or a URL/URI to an external data provider). A data model can have multiple datasets from multiple sources.
- Event triggers

A trigger checks for an event. When the event occurs the trigger runs the PL/SQL code associated with it. The data model editor supports before data and after data triggers as

well as schedule triggers. Before data and after data triggers consist of a call to execute a set of functions defined in a PL/SQL package stored in an Oracle database. A schedule trigger is executed for scheduled reports and tests for a condition that determines whether or not to run a scheduled report job.

- Flexfields

A flexfield is a structure specific to Fusion Applications Suite. The data model editor supports retrieving data from flexfield structures defined in your Fusion Applications Suite database tables.

- Lists of values

A list of values is a menu of values from which report consumers can select parameter values to pass to the report.

- Parameters

A parameter is a variable whose value can be set at runtime. The data model editor supports several parameter types.

- Bursting Definitions

Bursting is a process of splitting data into blocks, generating documents for each data block, and delivering the documents to one or more destinations. A single bursting definition provides the instructions for splitting the report data, generating the document, and delivering the output to its specified destinations.

- Custom Metadata (for Web Content Servers)

If you've configured a web content server as a delivery destination and enabled custom metadata, the custom metadata component displays in the data model editor. Use this component to map data fields from your data model to the custom metadata fields set up for a set of rules defined in a Content Profile.

## About the Data Source Options

Data source types supported for creating datasets can be categorized into three general types.

The full range of editor functions in data model are supported for these dataset types:

- SQL queries submitted against Oracle BI Server, an Oracle Database, or other supported databases. Publisher can retrieve the metadata information from these SQL queries.

See [Create Datasets Using SQL Queries](#).

- Multidimensional (MDX) queries against an OLAP data source

See [Create a Dataset Using a MDX Query Against an OLAP Data Source](#).

- Queries against your LDAP repository to retrieve user data

You can report on this data directly, or join this to data retrieved from other sources. See [Create a Data Set Using an LDAP Query](#).

- Microsoft Excel spreadsheet data sources

You can store the Excel spreadsheet in a file directory set up as a data source by your administrator, or you can upload it directly from a local source to the data model. See [Create a Dataset Using a Microsoft Excel File](#).

- XML data file data sources

You can store the XML file in a file directory set up as a data source by your administrator, or you can upload it directly from a local source to the data model. See [Create a Dataset Using a XML File](#).

- CSV (comma separated value) file data sources

You can store the CSV file in a file directory set up as a data source by your administrator, or you can upload it directly from a local source to the data model. See [Create a Dataset Using a CSV File](#).

### Dataset types that can use partial editor functions in data model

Publisher can retrieve the column names and data type information from the data source of these dataset types, but it can't process or structure the data. Only a subset of the full range of editor functions in data model are supported for dataset types:

- Analysis  
See [Create a Dataset Using an Analysis](#).
- View objects created using Oracle Application Development Framework (ADF).  
See [Create a Data Set Using a View Object](#).
- Visualization  
See [Use Self-Service Analytics](#).

### Dataset types that can't be modified in the data model editor

For these dataset types, Publisher can retrieve the data generated and structured at the source. You can't apply additional modifications in the data model editor for these dataset types:

- HTTP XML feeds off the web  
See [Create a Dataset from an HTTP XML Feed](#).
- Web services  
See [Create a Dataset Using a Web Service](#).

To use a web service to return data for the report, supply the web service WSDL to Publisher and then define the parameters in Publisher.

## Process Overview for Creating a Data Model

Follow the steps below to create a data model.

Step	Reference
Launch the data model editor.	<a href="#">Launch the Data Model Editor</a>
Set properties for the data model.	<a href="#">Data Model Properties</a>
Create the data sets for the data model.	<a href="#">Create Datasets</a>
Define the data output structure.	<a href="#">Structure Data</a>
Define the parameters to pass to the query, and define lists of values for users to select parameter values.	<a href="#">Add Parameters and Lists of Values</a>
Define Event Triggers.	<a href="#">About Triggers</a>
(Oracle Applications Only) Define Flexfields.	<a href="#">Add Flexfields</a>

Step	Reference
Test your data model and add sample data.	<a href="#">Test Data Models and Generate Sample Data</a>
Add a bursting definition.	<a href="#">Add Bursting Definitions</a>
Map Custom Metadata for documents to be delivered to Web Content Servers	<a href="#">Add Custom Metadata for Oracle WebCenter Content Server</a>

## Features of the Data Model Editor

The data model editor for pixel-perfect reporting enables you to combine data from multiple datasets into a single XML data structure.

Datasets from multiple data sources can be merged either as sequential XML or at line-level to create a single combined hierarchical XML. Using the data model editor you can easily combine data from the following dataset types: SQL query, OLAP (MDX query), LDAP, and Microsoft Excel.

The data model editor is designed with a component pane on the left and work pane on the right. Selecting a component on the left pane launches the appropriate fields for the component in the work area.

The data model editor supports the following:

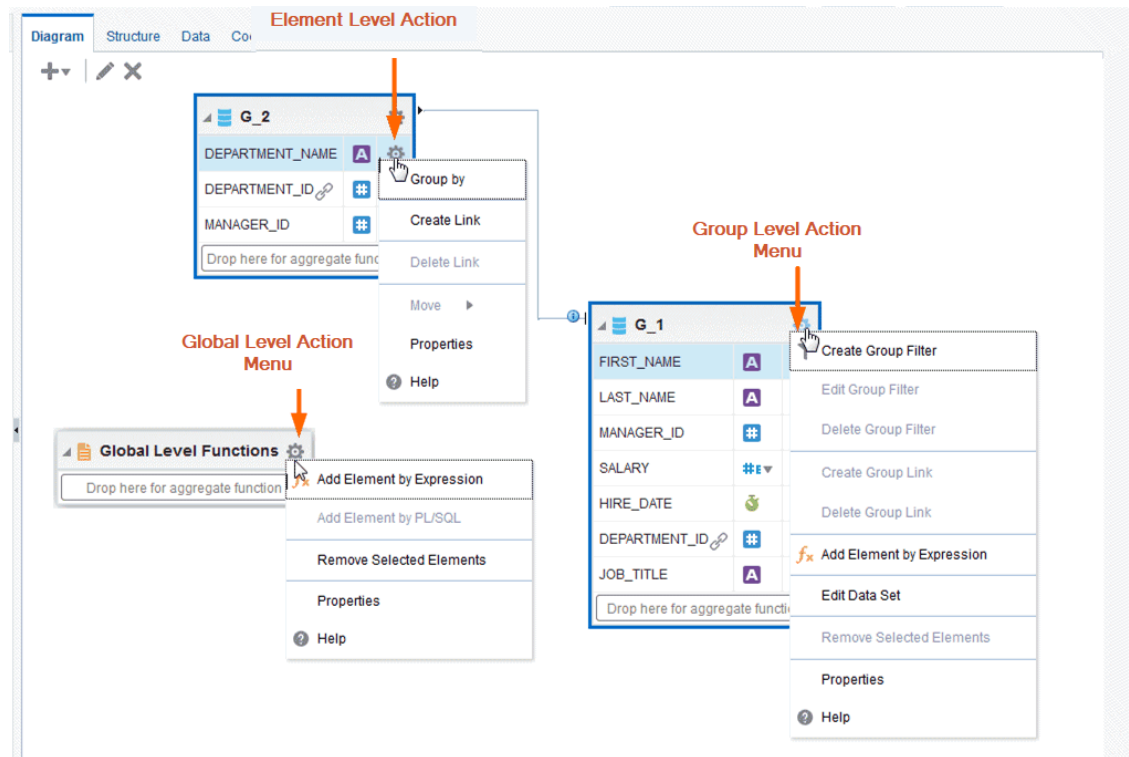
- **Group data** - Create groups to organize the columns in your report. Groups can do two things: separate a query's data into sets, and filter a query's data.

When you create a query, the data engine creates a group that contains the columns selected by the query; you can create groups to modify the hierarchy of the data appearing in a data model. Groups are used primarily when you want to treat some columns differently than others. For example, you create groups to produce subtotals or create breaks.

- **Link data** - Define master-detail links between datasets to group data at multiple levels.
- **Aggregate data** - Create group level totals and subtotals.
- **Transform data** - Modify source data to conform to business terms and reporting requirements.
- **Create calculations** - Compute data values that are required for your report that are not available in the underlying data sources.

The data model editor provides functions at the element level, the group level, and the global level. Note that not all dataset types support all functions. See the Important Notes section that accompanies your dataset type for limitations. The figure below highlights some of the features and actions available in the data model editor.

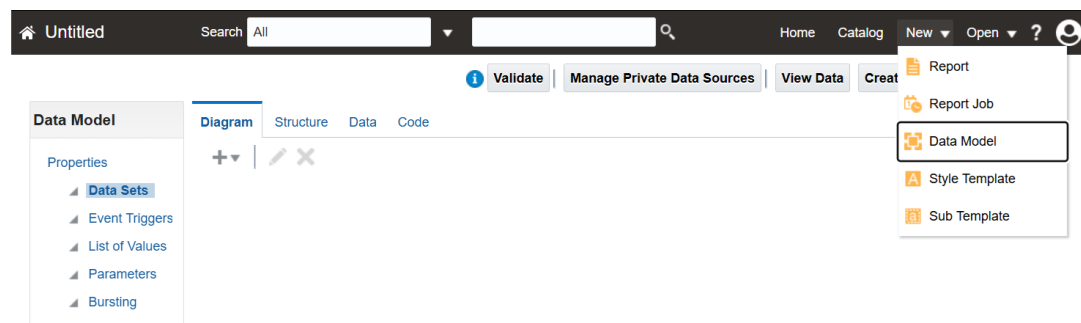




## Launch the Data Model Editor

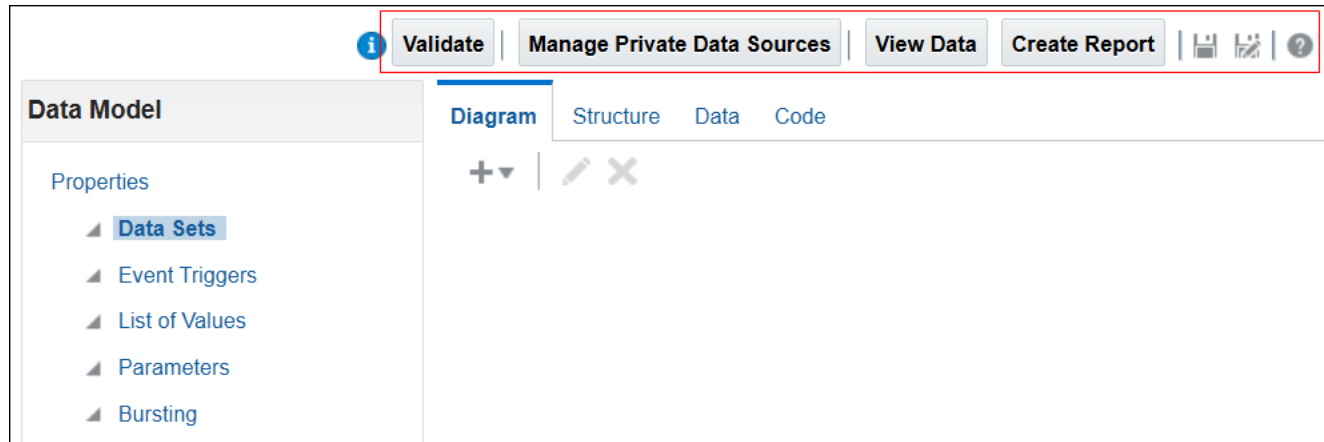
Launch the data model editor to build a data model for pixel-perfect report.

1. From the header or from the Home page, click **Create**.
2. Click **Data Model**.



## About the Data Model Editor Toolbar

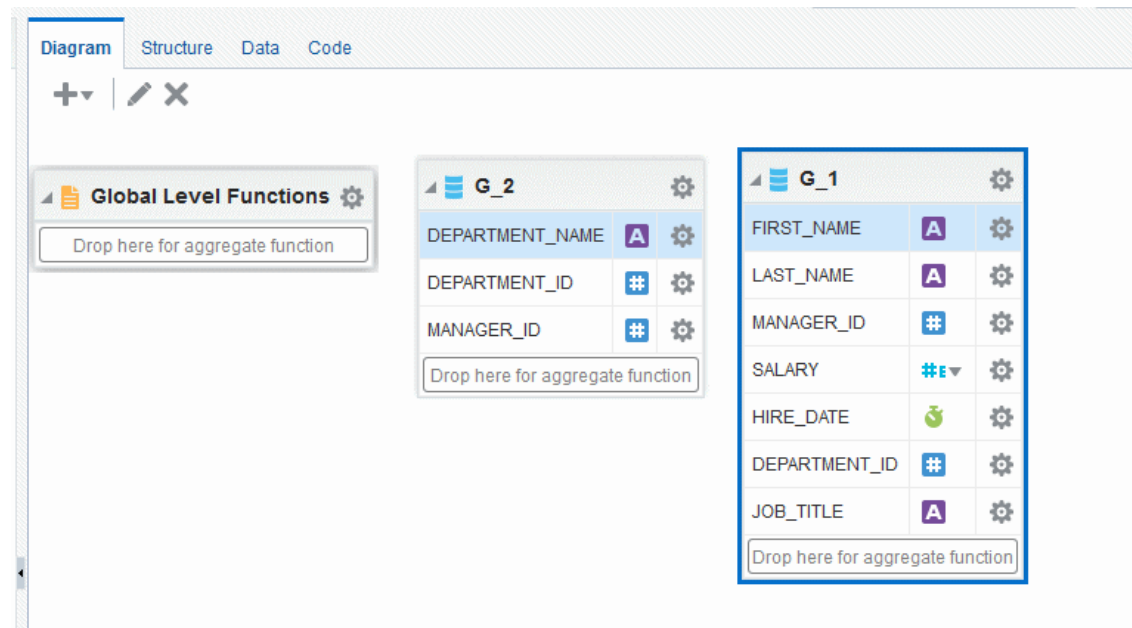
In the data model editor, the toolbar on the top provides you the options to manage private data sources, view data, create report, and save the data model.



Option	Description
<b>Validate</b>	Validate the queries used for datasets, LOVs, and bursting definitions. See <a href="#">Validate Data Models</a> .
<b>Manage Private Data Sources</b>	Connect to private data sources for your personal use that don't require setup by an administrator.
<b>View Data</b>	Display the Data tab where you view and generate sample data.
<b>Create Report</b>	Create a new report with this data model.
<b>Save / Save As</b>	Select <b>Save</b> to save your work in progress to the existing data model object or select <b>Save As</b> to save the data model as a new object in the catalog.  If you create a data model and then navigate out of the data model editor without saving it, a draft or temporary data model entry might be displayed in the Recent section of the Home page. You can't manually delete the temporary data model entries manually. The temporary data model entries are automatically deleted after 24 hours.
<b>Help</b>	View online help.

## About the Interface

By default, the datasets that you created are shown in the Diagram View as separate objects.



The dataset structure builder has these views:

- **Diagram** - The **Diagram** view displays datasets and enables graphically creating links and filters, adding elements based on expressions, adding aggregate functions and global-level functions, editing element properties, and deleting elements. The Diagram view is typically the view you use to build your data structure.
- **Structure** - The **Structure** view has two modes:  
Table View and Output  
The table view displays element properties in a table and enables updating XML element alias names, presentation names of the elements, sorting, null values, and reset options. The image below shows the structure Table View.

Diagram <b>Structure</b> Data Code						
Table View   Output						
Data Source	XML View			Business View		
	XML Tag Name	Sorting	Value If Null	Display Name	Data Type	
Report Data						
Data Structure	DATA_DS					
Departments	G_2					
DEPARTMENT_NAME	DEPARTMENT_NAME			DEPARTMENT_NAME	A	
DEPARTMENT_ID	DEPARTMENT_ID			DEPARTMENT_ID	#	
MANAGER_ID	MANAGER_ID			MANAGER_ID	#	
Employees	G_1					
FIRST_NAME	FIRST_NAME			FIRST_NAME	A	
LAST_NAME	LAST_NAME			LAST_NAME	A	
MANAGER_ID	MANAGER_ID			MANAGER_ID	#	
SALARY	SALARY			SALARY	#E	
HIRE_DATE	HIRE_DATE			HIRE_DATE		
DEPARTMENT_ID	DEPARTMENT_ID			DEPARTMENT_ID	#	
JOB_TITLE	JOB_TITLE			JOB_TITLE	A	

The **Output** view provides a clear view of the XML structure that is generated. The Output view cannot be updated. The figure shows the Output view.



- **Data** - The **Data** view displays the following options to view the output and test your data model.
  - **View** - Click **View** to display the XML that is returned by the data model. Select the default display option, **Tree View** to view the sample data in a data hierarchy. Select **Table View** to view the sample data in a formatted table similar to what you see in the reports.
  - **Export** - After the data model has successfully run, click **Export** to open or save the file to a local directory.
  - **Save as Sample Data** - After the data model has successfully run, click **Save as Sample Data** to save the sample data to the data model.
  - **View Engine Log** - Click **View Engine Log** to view the data engine log file.
  - **Generate SQL Monitor Report** - Click **Generate SQL Monitor Report** to generate the Explain plan for the data model and the data.
- **Code** - The **Code** view displays the data structure code created by the data structure builder that is read by the data engine. You can update the content in code view. The figure shows the code view.

Diagram	Structure	Data	Code
<pre> &lt;output rootName="DATA_DS" uniqueRowName="false"&gt; &lt;nodeList name="data-structure"&gt; &lt;dataStructure tagName="DATA_DS"&gt; &lt;group name="G_2" label="G_2" source="Departments"&gt; &lt;element name="DEPARTMENT_NAME" value="DEPARTMENT_NAME" label="DEPARTMENT_NAME" dataType="xsd:string" breakOrder="" fieldOrder="1"/&gt; &lt;element name="DEPARTMENT_ID" value="DEPARTMENT_ID" label="DEPARTMENT_ID" dataType="xsd:integer" breakOrder="" fieldOrder="2"/&gt; &lt;element name="MANAGER_ID" value="MANAGER_ID" label="MANAGER_ID" dataType="xsd:integer" breakOrder="" fieldOrder="3"/&gt; &lt;/group&gt; &lt;group name="G_1" label="G_1" source="Employees"&gt; &lt;element name="FIRST_NAME" value="FIRST_NAME" label="FIRST_NAME" dataType="xsd:string" breakOrder="" fieldOrder="1"/&gt; &lt;element name="LAST_NAME" value="LAST_NAME" label="LAST_NAME" dataType="xsd:string" breakOrder="" fieldOrder="2"/&gt; &lt;element name="MANAGER_ID" value="MANAGER_ID" label="MANAGER_ID" dataType="xsd:integer" breakOrder="" fieldOrder="3"/&gt; &lt;element name="SALARY" value="SALARY" label="SALARY" dataType="xsd:double" breakOrder="" fieldOrder="4"/&gt; &lt;element name="HIRE_DATE" value="HIRE_DATE" label="HIRE_DATE" dataType="xsd:date" breakOrder="" fieldOrder="5" formatMask=""/&gt; &lt;element name="DEPARTMENT_ID" value="DEPARTMENT_ID" label="DEPARTMENT_ID" dataType="xsd:integer" breakOrder="" fieldOrder="6"/&gt; &lt;element name="JOB_TITLE" value="JOB_TITLE" label="JOB_TITLE" dataType="xsd:string" breakOrder="" fieldOrder="7"/&gt; &lt;/group&gt; &lt;/dataStructure&gt; &lt;/nodeList&gt; &lt;/output&gt; </pre>			

## Data Model Properties

You can access the Data Model Properties page when you click **Properties** in the components pane of the data model editor.

**Properties**

Description

Data Sources: Sample Sales BI Server subject area; XLS File

Default Data Source

Oracle BI EE

Oracle DB Default Package

Query Time Out

Enable SQL Pruning

Instance Level

Skip Unused Data Set Query ☐

Enable SQL session trace

Instance Level

SQL Trace Name

Enable XML Pruning

Off

Backup Data Source

☐ Enable Backup Connection
 

☐ Switch to Backup Data Source when Primary Data Source is unavailable
 ☐ Use Backup Data Source only

Enable CSV Output

☐

Optimize Query Execution

☐

Multithread Query Execution

☐

Enter the following properties for the data model:

Property	Description
<b>Description</b>	Enter a description for the data model. The catalog displays the descriptions of data models. This description is translatable.
<b>Default Data Source</b>	Select the data source from the list. Data models can include multiple datasets from one or more data sources. The default data source you select here is presented as the default for each new SQL dataset you define. Select <b>Refresh Data Source List</b> to see any new data sources added since your session was initiated.
<b>Oracle DB Default Package</b>	<p>Enter a default PL/SQL package for data models that include event triggers or a PL/SQL group filter. The package must exist on the default data source.</p> <p>If you define a query against an Oracle Database, then you can include before or after data triggers (event triggers) in your data model. Event triggers make use of PL/SQL packages to execute RDBMS level functions.</p>
<b>Query Timeout</b>	<p>Enter a time limit in seconds within which to execute an SQL query in the database. This property applies to SQL query-based data models for scheduled reports. If you don't enter a value for this data model, the server property value is used.</p> <p>This timeout doesn't include processing time of the result set. For example: select * from all_invoices query might execute in 5 milliseconds. However, fetching the results sets and processing the 10M rows might take 3 hours.</p> <p>If the SQL query is still processing when the timeout value is met, the error Failed to retrieve data xml. is returned.</p>
<b>Enable SQL Pruning</b>	<p>Select this property to enhance processing time and reduces memory usage. This property applies to Oracle Database queries only that use standard SQL. If your query returns many columns but only a subset are used by your report template, SQL pruning returns only those columns required by the template.</p> <p>Note that <b>Enable SQL Pruning</b> is also a server-level property. Therefore, by default the data model-level property is set to Instance Level to inherit the server or instance level setting. To turn SQL pruning on or off for this particular data model, select <b>On</b> or <b>Off</b> from the list.</p> <p>SQL pruning is not applicable for PDF, Excel, and E-text template types.</p>
<b>Skip Unused Dataset Query</b>	<p>Select this property to omit the execution of any unused datasets in the layout, so you can reduce processing time and memory usage. By default, all datasets in a data model are executed whether a dataset is required for the output. When a data model contains multiple datasets for different layouts, each layout might not require all the datasets defined in the data model.</p> <p>You must set the <b>Enable SQL Pruning</b> property to <b>On</b> to use the <b>Skip Unused Dataset Query</b> property.</p>

Property	Description
<b>Enable SQL Session Trace</b>	<p>Select this property to enable SQL session trace. For each SQL statement, the trace contains:</p> <ul style="list-style-type: none"> <li>• Parse, execute, and fetch counts</li> <li>• CPU time and elapsed time</li> <li>• Physical reads and logical reads</li> <li>• Number of rows processed</li> <li>• Library cache failures</li> <li>• User name for which each parse occurred</li> <li>• Each commit and rollback</li> </ul> <p>This property applies to Oracle Database queries that use standard SQL.</p> <p>Administrators and BI Authors can enable diagnostics before running the report, and then download the diagnostic logs.</p>
<b>SQL Trace Name</b>	Enter a name for the SQL trace.
<b>Enable XML Pruning</b>	<p>Select <b>On</b> to prune XML datasets larger than 2GB. If you enable XML data pruning, Publisher removes the unnecessary data elements and builds the XML structure using only the data fields that are mapped to the layout fields. Data pruning improves performance, especially for extremely large data extractions.</p> <p>Report consumers can configure XML data pruning when scheduling a job. XML data pruning isn't supported for XPT template (Publisher Layout).</p>
<b>Backup Data Source</b>	<p>Select the <b>Enable Backup Connection</b> property to use the backup data source.</p> <ul style="list-style-type: none"> <li>• To use the backup data source only when the primary is down, select <b>Switch to Backup Data Source when Primary Data Source is unavailable</b>. Note that when the primary data source is down, the data engine must wait for a response before switching to the backup.</li> <li>• To always use the backup data source when executing this data model, select <b>Use Backup Data Source Only</b>. Using the backup database may enhance performance.</li> </ul> <p>You must enable a backup for the data source.</p>
<b>Enable CSV Output</b>	Select this property to generate report output only in a CSV file.
<b>Optimize Query Execution</b>	<p>Select this property to allow the data processor to optimize the execution of SQL queries of parent and child datasets.</p> <p>Select this property only when the data model includes a parent-child hierarchy structure in a SQL dataset. Don't select this option for non-structured and non-SQL datasets.</p>



Property	Description
<b>Multithread Query Execution</b>	<p>Select this property to create multiple database connections to query the child datasets in parallel. If you select this property, the number of database connections per data model increases.</p> <p>This property is enabled only when:</p> <ul style="list-style-type: none"> <li>• <b>Optimize Query Execution</b> is set to true.</li> <li>• Data model has more than one dataset.</li> <li>• Data model has parallel child dataset queries linked to the parent dataset.</li> <li>• Data model uses the default data source.</li> </ul> <p>This property cannot be used when:</p> <ul style="list-style-type: none"> <li>• Data model uses event triggers.</li> <li>• Data model has a dataset query linearly linked to the parent dataset.</li> <li>• Data model uses multiple data sources.</li> </ul>

## XML Output Options

These options define the characteristics of the XML data structure. Any changes to these options can impact layouts that are built on the data model.

- **Include Parameter Tags** — If you define parameters for your data model, select this option to include the parameter values in the XML output file. See [Add Parameters and Lists of Values](#) for adding parameters to your data model. Enable this option when you want to use the parameter value in the report.
- **Include Empty Tags for Null Elements** — Select this option to include elements with null values in your output XML data. When you include a null element, then a requested element that contains no data in your data source is included in your XML output as an empty XML tag as follows: <ELEMENT\_ID\>. For example, if the element MANAGER\_ID contained no data and you chose to include null elements, it would appear in your data as follows: <MANAGER\_ID />. If you do not select this option, no entry is displayed for MANAGER\_ID.
- **Include Open & Close Tags** — Select this option to include the open and close tags in your output XML data.
- **Include Group List Tag** — (This property is for 10g backward compatibility and Oracle Report migration.) Select this option to include the rowset tags in your output XML data. If you include the group list tags, then the group list displays as another hierarchy within your data.
- **Exclude Tags for LOB Columns** — Select this property to exclude the XML element tags for LOB columns. The data model must contain a single dataset of SQL query type and a single Character Large Object data element containing data extracted from an XML file. You can't use global level, summary, or aggregate functions, elements based on expressions, or group filters.
- **Exclude Line Feed And Carriage Return for LOB** — Select this option to exclude carriage returns and line feeds in the data.
- **XML Tag Display** — Select the display format to generate the XML data tags - uppercase, lowercase, or to preserve the definition you supplied in the data structure.

## Add Attachments to the Data Model

The Attachment region of the page displays data files that you've uploaded or attached to the data model.

### Attach Sample Data

After you build your data model, you must attach a small, but representative set of sample data generated from your data model. The sample data is used by Publisher's layout editing tools. Using a small sample file helps improve performance during the layout design phase.

The data model editor provides an option to generate and attach the sample data. See [Test Data Models and Generate Sample Data](#).

The administrator can set a limit to the size of the sample data file.

### Attach Schema

The data model editor enables you to attach sample schema to the data model definition.

Publisher doesn't use the schema file. However, you can attach the schema for developer reference. The data model editor doesn't support schema generation.

### Data Files

If you upload a local Microsoft Excel, CSV, or XML file as a data source for this report, the file displays here.

Use the refresh button to refresh this file from the local source. For information on uploading files to use as data sources, see [Create Datasets](#).

# 2

## Create Datasets

This topic describes creating datasets, testing data models, and saving sample data.

### Topics:

- [Create a Dataset](#)
- [Edit Dataset](#)
- [Create Datasets Using SQL Queries](#)
- [Create a Dataset Using a MDX Query Against an OLAP Data Source](#)
- [Use MDX Query Builder](#)
- [Create a Dataset Using an Analysis](#)
- [Create a Dataset Using a Web Service](#)
- [Create a Dataset Using a XML File](#)
- [Create a Dataset Using a Microsoft Excel File](#)
- [Create a Dataset Using a CSV File](#)
- [Create a Dataset from an HTTP XML Feed](#)
- [Use Data Stored as a Character Large Object \(CLOB\) in a Data Model](#)
- [Test Data Models and Generate Sample Data](#)
- [Include User Information Stored in System Variables in Your Report Data](#)

## Use Self-Service Analytics

You can use self-service analytics to create datasets for reports.

In Oracle Analytics, you can upload data from a variety of sources (for example, spreadsheets, CSV files, and many databases) to your system, explore your data to find correlations, discover patterns, and see trends.

Use the Dataset editor to capture the analyzed data in datasets that include tables and joins. You can use these self-service datasets and data flows to generate online reports and offline reports (scheduled reports).

### Note

After you import a self-service dataset in Publisher, if you change the structure of the self-service dataset, you must manually edit and refresh the self-service dataset. You can't import the expressions and user-calculated elements from a self-service dataset to a Publisher data model. You can't link between datasets.

Make sure the JDBC connection to Oracle BI EE data source includes the **BI Consumer** role in the allowed roles list.

## Create a Dataset Using a Self-Service Dataset

You can use self-service datasets that contain one or more tables to create datasets.

1. On the component pane of the data model editor, select **Dataset** and select **DV Data**.  
The Datasets tab lists all the self-service datasets.
2. In the Datasets tab, select the dataset you want to use for pixel-perfect reporting.
3. Select the columns of each table you want use in the dataset for reporting.
4. Click **Next**.
5. Enter a name for the dataset.
6. If you want to configure parameters, perform these steps for each parameter:
  - a. Click **Add Parameter**.
  - b. Select a column from the **Column Name** list.
  - c. If you want to change the name of the parameter, edit the name in the **Parameter** field.
7. Click **Finish**.

## Create a Dataset Using a Self-Service Data Flow

You can use self-service flows to create datasets.

You can't use these types of data flows to create datasets:

- Data flows created with the **Save Model** option.
  - Data flows with branched datasets.
1. Select **Datasets**, click **New Dataset** in the Diagram tab, and then select **DV Data**.
  2. In the Data Flows tab, select a data flow you want to use and click **Next**.
  3. Enter a name for the dataset.
  4. If you want to configure parameters, perform these steps for each parameter:
    - a. Click **Add Parameter**.
    - b. Select a column from the **Column Name** list.
    - c. If you want to change the name of the parameter, edit the name in the **Parameter** field.
  5. Click **Finish**.

## Create a Dataset

Reports use data from the datasets defined in the data model. You can use data from multiple types of data sources to create a dataset.

1. On the component pane of the data model editor, click **New Dataset** and select your source dataset type.
2. Complete the required fields. Refer the help topic for the dataset type you want to create.

## Create Datasets Using SQL Queries

These topics explain how to create datasets using SQL queries.

- [Enter SQL Queries](#)
- [Use the SQL Query Builder](#)
- [Add a Bind Variable to a Query](#)
- [Add Lexical References to SQL Queries](#)
- [Define SQL Queries Against the Oracle BI Server](#)

## Enter SQL Queries

Use these steps to enter SQL queries.

To enter an SQL query:

1. Click **New Dataset** and then click **SQL Query**.
2. In the dialog to create a new dataset, enter a name for the dataset.
3. The data source defaults to the default data source that you selected on the Properties page. If you aren't using the default data source for this dataset, select the **Data Source** from the list.

You can also use your private data source connections as data sources for SQL query datasets.

4. Select **Standard SQL** from the **Type of SQL** drop-down list. Standard SQL is used for normal SELECT statements interpreted to understand database schema.
5. Enter the SQL query or click **Query Builder** to launch the Query Builder page.
6. If you are using Flexfields, bind variables, or other special processing in your query, edit the SQL code returned by the Query Builder to include the required statements.

If you include lexical references for text that you embed in a SELECT statement, then you must substitute values to get a valid SQL statement.

7. After entering the query, click **OK** to save. For Standard SQL queries, the data model editor validates the query.

If your query includes a bind variable, you're prompted to create the bind parameter. Click **OK** to have the data model editor create the bind parameter.

## Use the SQL Query Builder

Use the Query Builder to build SQL queries without coding. The Query Builder enables you to search and filter database objects, select objects and columns, create relationships between objects, and view formatted query results with minimal SQL knowledge.

This section describes how to use the Query Builder and includes the following topics:

- [Overview of the Query Builder](#)
- [Build a Query Using Query Builder](#)
- [Supported Column Types](#)
- [Add Objects to the Design Pane](#)
- [Remove or Hide Objects in the Design Pane](#)
- [Query Conditions](#)
- [Create Relationships Between Objects](#)
- [Save a Query](#)

- [Edit a Saved Query](#)

## Overview of the Query Builder

The Query Builder page is divided into an Object Selection pane and a design and output pane.

- Object Selection pane contains a list of objects from which you can build queries. Only objects in the current schema are displayed.
- Design and output pane consists of four tabs:
  - **Model** — Displays selected objects from the Object Selection pane.
  - **Conditions** — Enables you to apply conditions to your selected columns.
  - **SQL** — Displays the query.
  - **Results** — Displays the results of the query.

## Build a Query Using Query Builder

You can build a query using Query Builder.

To build a query using Query Builder:

1. Select a schema.

The Schema list displays all available schemas in the data source. You might not have access to all schemas in that list.

2. Add objects to the Design pane and select columns.

The Object Selection pane lists the tables, views, and materialized views from the selected schema. For an Oracle Database, the pane also lists synonyms. When you select an object from the list, it's displayed on the Design pane. Use the Design pane to specify how to use selected objects in the query.

You might need to use the Search field to enter a search string. If the data source includes more than 100 tables, use the Search features to locate and select objects.

3. Optional: Establish relationships between objects.
4. Add a unique alias name for any duplicate column.
5. Optional: Create query conditions.
6. Execute the query and view results.

## Supported Column Types

Columns of all types display as objects in the Design pane. You can't select more than 60 columns for each query.

Supported Column Type	Restrictions
VARCHAR2, CHAR	NA
NUMBER	NA
DATE, TIMESTAMP	The TIMESTAMP WITH LOCAL TIMEZONE data type isn't supported.

Supported Column Type	Restrictions
Binary Large Object (BLOB)	The BLOB can be an image, text, or XML data. When you execute the query in the Query Builder, the BLOB doesn't display in the Results pane; however, the query is constructed correctly when saved to the data model editor. BLOB data isn't supported for an Oracle BI EE data source due to limitations of the BIJDBC driver. Use an RTF template if you want to use a BLOB data column with an Image data type.
Character Large Object (CLOB)	Publisher doesn't support querying of CLOB columns in an Oracle Analytics Server data source.

## Add Objects to the Design Pane

Select each object you want to add to the Design pane.

- When you add an object, an icon representing the data type displays next to each column name.
- When you select a column, it appears on the **Conditions** tab. The **Show** check box on the **Conditions** tab controls whether a column is included in query results. By default, this check box is selected.
- To select the first twenty columns, click the small icon in the upper left corner of the object and then select **Check All**.
- You can also execute a query by pressing the **CTRL + ENTER** keys.

To add objects to the design pane:

1. Select an object.
2. Select the check box for each column to include in your query.
3. To execute the query and view results, select **Results**.

## Remove or Hide Objects in the Design Pane

You can remove or hide objects in the Design pane of Query Builder.

1. To remove an object, click **Remove** in the upper right corner of the object.
2. To temporarily hide the columns within an object, click **Show/Hide Columns**.

## Query Conditions

Conditions enable you to filter and identify the data you want to work with.

As you select columns within an object, you can specify conditions on the Conditions tab. You can modify the column alias, apply column conditions, sort columns, or apply functions.

Condition Attribute	Description
Condition	The condition modifies the query's WHERE clause. When specifying a column condition, you must include the appropriate operator and operand. All standard SQL conditions are supported. For example:  >=10 ='VA'  IN (SELECT dept_no FROM dept) BETWEEN SYSDATE AND SYSDATE + 15
Function	Specifies the functions. Available argument functions include: <ul style="list-style-type: none"><li>• <b>Number columns</b> — COUNT, COUNT DISTINCT, AVG, MAXIMUM, MINIMUM, SUM</li><li>• <b>VARCHAR2, CHAR columns</b> — COUNT, COUNT DISTINCT, INITCAP, LENGTH, LOWER, LTRIM, RTRIM, TRIM, UPPER</li><li>• <b>DATE, TIMESTAMP columns</b> — COUNT, COUNT DISTINCT</li></ul>
Group By	Specifies the columns to be used for grouping when an aggregate function is used. Only applicable for columns included in output.

As you select columns and define conditions, Query Builder writes the SQL for you. To view the underlying SQL, select the **SQL** tab.

## Create Relationships Between Objects

You can create relationships between objects by creating a join. A join identifies a relationship between two or more tables, views, or materialized views.

- [About Join Conditions](#)
- [Join Objects Manually](#)

### About Join Conditions

When you write a join query, you specify a condition that conveys a relationship between two objects. This condition is called a join condition.

A join condition specifies how the rows from one object combine with the rows from another object.

Query Builder supports inner, outer, left, and right joins.

- An inner join, also called a simple join, returns the rows that satisfy the join condition.
- An outer join extends the result of a simple join.

An outer join returns all rows that satisfy the join condition and returns some or all of those rows from one table for which no rows from the other satisfy the join condition.

### Join Objects Manually

Create a join manually by selecting the Join column in the Design pane.

1. From the Object Selection pane, select the objects you want to join.
2. Identify the columns you want to join.

You create a join by selecting the **Join** column adjacent to the column name. The **Join** column displays to the right of the data type. When your cursor is in the appropriate position, the following help tip displays:



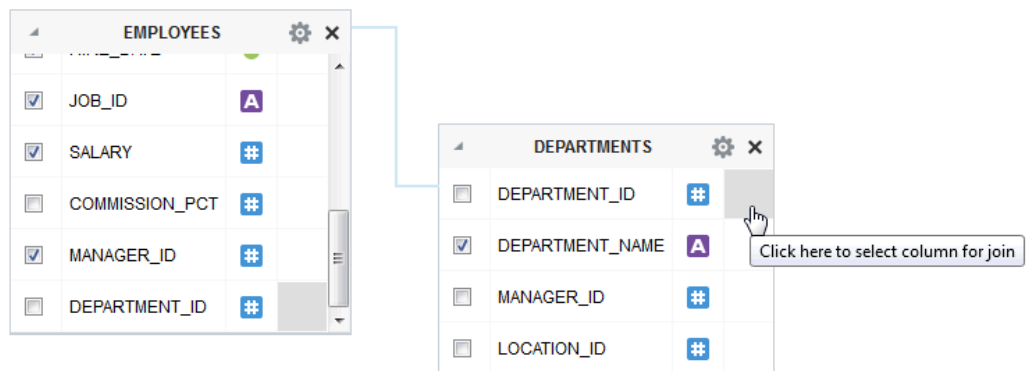
Click here to select column for join

3. Select the appropriate **Join** column for the first object.

When selected, the **Join** column is darkened. To deselect a **Join** column, simply select it again or press **ESC**.

4. Select the appropriate **Join** column for the second object.

When joined, line connects the two columns. An example is shown below.



5. Select the columns to be included in your query. You can view the SQL statement resulting from the join by positioning the cursor over the join line.
6. Click **Results** to execute the query.

## Save a Query

Save the SQL query after building it in Query Builder.

1. In Query Builder, after you've built a query, click **Save** to return to the data model editor. In the data model editor, the query appears in the SQL Query box.
2. Click **OK** to save the dataset.

## Edit a Saved Query

In the the data model editor, after you save a query from the Query Builder, you can also use the Query Builder to edit the query.

If you've made modifications to the query, or didn't use the Query Builder to construct it, you might receive an error when you launch the Query Builder for editing the query. If the Query Builder can't parse the query, you can edit the statements directly in the text box.

You can't edit a customized or an advanced query by using Query Builder.

1. In the the data model editor, under **Data Sets**, select the SQL dataset you want to edit.
2. On the toolbar, click **Edit Selected Dataset** to launch the **Edit Dataset** dialog.
3. Click **Query Builder** to load the query to the Query Builder.
4. Edit the query and click **Save**.

## Add a Bind Variable to a Query

After you create a query, you can add a bind variable to the query to pass a parameter to limit the results.

1. In the Query Builder, click the **Conditions** tab.
2. For the column you want to add a bind variable, enter the parameter name in the following format:

in (:PARAMETER\_NAME)

After you edit the query, the Query Builder can no longer parse it. You must make any additional edits manually.

For example, in the employee listing, you can choose a specific department.

The image shows the columns in the department table.

Column	Alias	Object	Condition	Sort Type	Sort Order	Show	Function	Group By	Delete
DEPARTMENT_NAME	DEPARTMENT_NAME	DEPARTMENTS	in (:PDEPT_NAME)	ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
FIRST_NAME	FIRST_NAME	EMPLOYEES		ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
LAST_NAME	LAST_NAME	EMPLOYEES		ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
EMPLOYEE_ID	EMPLOYEE_ID	EMPLOYEES		ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
EMAIL	EMAIL	EMPLOYEES		ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
PHONE_NUMBER	PHONE_NUMBER	EMPLOYEES		ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
SALARY	SALARY	EMPLOYEES		ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
MANAGER_ID	MANAGER_ID	EMPLOYEES		ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
JOB_ID	JOB_ID	EMPLOYEES		ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>
HIRE_DATE	HIRE_DATE	EMPLOYEES		ASC		<input checked="" type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Add a Bind Variable Using a Text Editor

Use the Data Model Editor to update a SQL query.

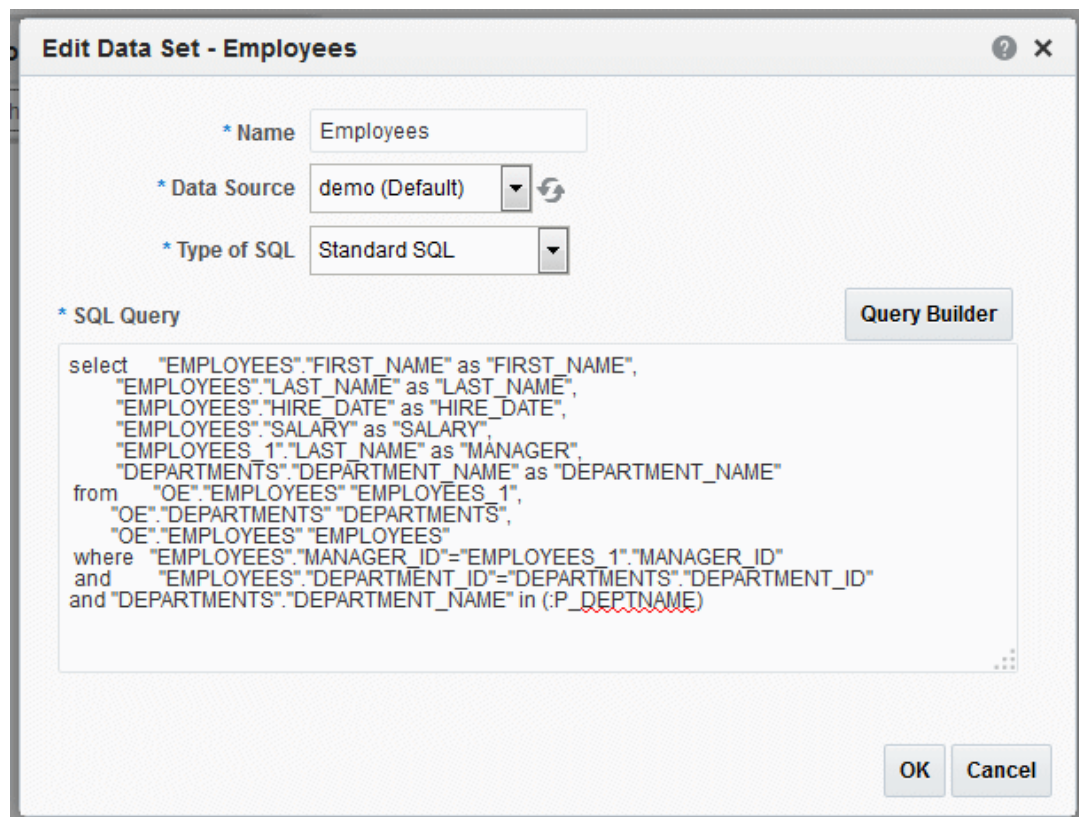
1. In the Edit Data Set dialog box, update the SQL query by adding the following after the where clause in your query:

and "COLUMN\_NAME" in (:PARAMETER\_NAME)

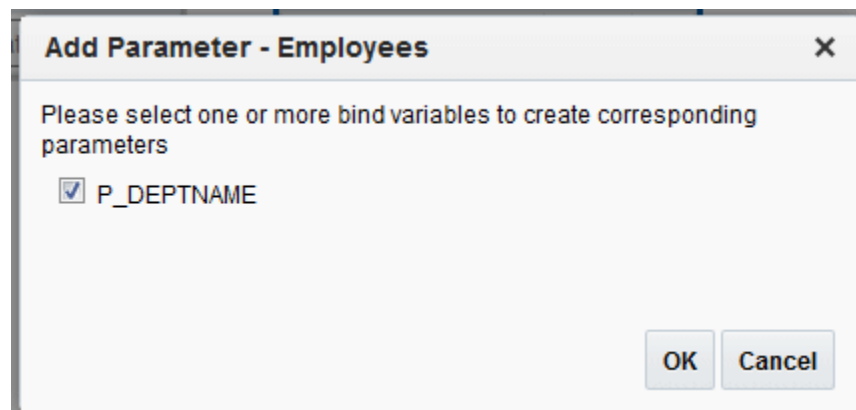
for example:

and "DEPARTMENT\_NAME" in (:P\_DEPTNAME)

where P\_DEPTNAME is the name you choose for the parameter, as shown below.



2. Click **Save**.
3. In the data model editor, select the parameter that you entered with the bind variable syntax as shown in the image.



4. Click **OK** to enable the data model editor create the parameter entry for you.

## Add Lexical References to SQL Queries

You can use lexical references in SQL queries to replace the clauses appearing after SELECT, FROM, WHERE, GROUP BY, ORDER BY, or HAVING.

Use a lexical reference when you want the parameter to replace multiple values at runtime. You can also use lexical references to include flexfields in your query. Lexical references are only supported in queries against applications in Fusion Applications Suite.

Create a lexical reference in the SQL query using the following syntax:

&parametername

1. Before creating your query, define a parameter in the PL/SQL default package for each lexical reference in the query. The data engine uses these values to replace the lexical parameters.
2. In the data model editor, on the Properties page, specify the **Oracle DB Default Package**.
3. In the data model editor, create a **Before Data** event trigger to call the PL/SQL package.
4. Create your SQL query containing lexical references.
5. When you click **OK** to close your SQL query, you are prompted to enter the parameter.

For example, create a package called employee. In the employee package, define a parameter called where\_clause:

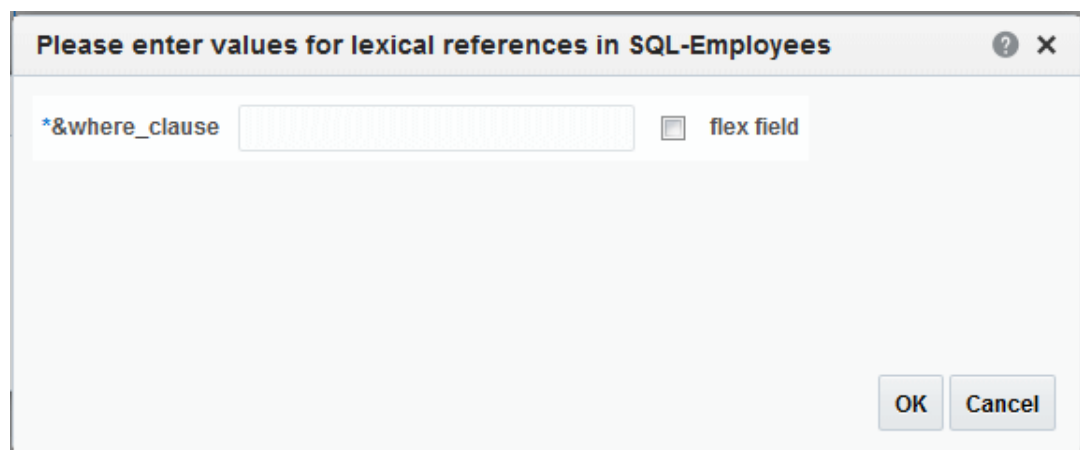
```
Package employee
AS
  where_clause varchar2(1000);
  ....

Package body employee
AS
  ....
  where_clause := 'where DEPARTMENT_ID=10';
  ....
```

Reference the lexical parameter in the SQL query where you want the parameter to be replaced by the code defined in the package, for example:

```
select  "EMPLOYEES"."EMPLOYEE_ID" as "EMPLOYEE_ID",
        "EMPLOYEES"."FIRST_NAME" as "FIRST_NAME",
        "EMPLOYEES"."LAST_NAME" as "LAST_NAME",
        "EMPLOYEES"."SALARY" as "SALARY",
from    "OE"."EMPLOYEES" "EMPLOYEES"
&where_clause
```

6. When you click **OK** on the Create SQL Dataset dialog box, the lexical reference dialog box prompts you to enter a value for lexical references you entered in the SQL query, as shown in the image that follows. Enter the value of the lexical reference as it's defined in the PL/SQL package.



At runtime, the data engine replaces `&where_clause` with the contents of `where_clause` defined in the package.

## About Defining SQL Queries Against the Oracle BI Server

Remember the following points when you define SQL queries against the Oracle BI Server.

- When you create a SQL query against the Oracle BI Server using the SQL Data Editor or the Query Builder, logical SQL is generated, not physical SQL like other database sources.
- Hierarchical columns aren't supported. The highest level is always returned.
- Within a subject area, the join conditions between tables are already created; therefore you don't have to create joins in the Query Builder. The Query Builder doesn't expose the primary key.

You can link datasets using the data model editor's **Create Link** function. See [Create Element-Level Links](#). For datasets created from the Oracle BI Server, there's a limit of two element-level links for a single data model.

- In the Query Builder, the functions **Sort Order** and **Group By** shown on the Conditions tab aren't supported for queries against the Oracle BI Server. If you enter a Sort Order or select the Group By check box, the Query Builder constructs the SQL, and writes it to the Publisher SQL Query text box, but when you attempt to close the Dataset dialog, the query fails validation.

To apply grouping to the data retrieved by the SQL query, you can use the data model editor's **Group by** function instead. See [Create Subgroups](#).

- If you pass parameters to the Oracle BI Server and you choose Null Value Passed for Can Select All, make sure you handle the null value in your query.

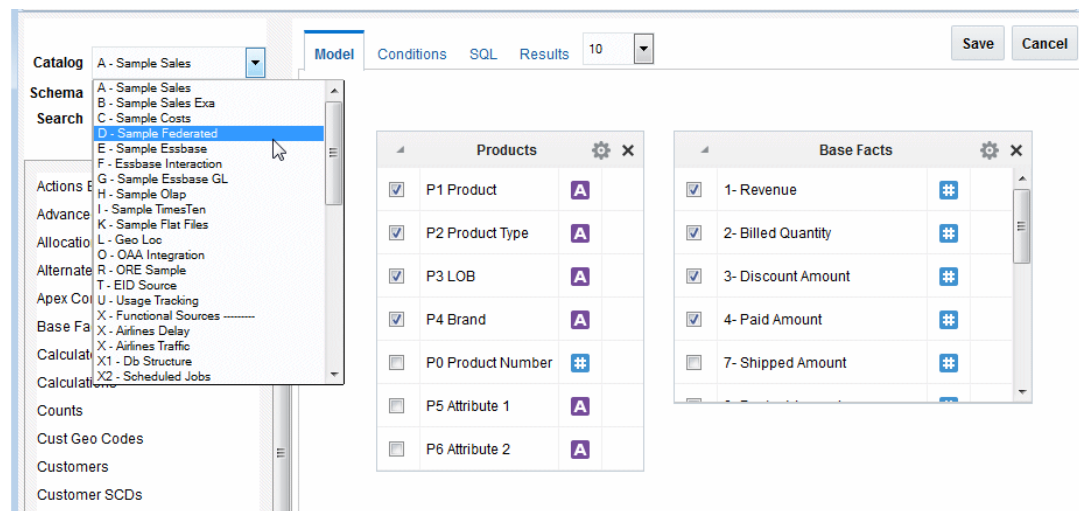
## Define SQL Queries Against the Oracle BI Server

When you launch the Query Builder against the Oracle BI Server, the Query Builder displays the subject areas from the catalog. You can drag the subject areas to the Query Builder workspace to display the columns. Select the columns to include in your data model.

1. In the data model editor, click **New Dataset** and then click **SQL Query**.
2. Enter a name for the dataset.
3. From the Data Source list, select the Oracle BI Server connection, usually shown as Oracle BI EE .
4. Click **Query Builder** to launch the Query Builder page.

You can also enter the SQL syntax manually in the SQL Query text box in the data model editor. However, you must use the Logical SQL syntax used by Oracle Analytics.

5. From the Catalog drop-down list, select a subject area as shown below. The list displays the subject areas defined in the Oracle Analytics.



6. Select tables and columns for the query.
7. Click **Save**.
8. Click **OK** to return to the data model editor. The generated SQL is Logical SQL that follows a star schema (that is, it isn't physical SQL).
9. Save your changes to the data model.

## Notes for Queries Against Oracle Fusion Cloud Applications Tables

Special considerations for Oracle Fusion Cloud Applications customers apply when writing queries against the Oracle Fusion Cloud Applications tables

- You cannot return month name from sysdate using `to_char(sysdate,"mon")`. This function returns the month number. To display month name, use one of the following solutions:
  - Format the date field in your layout using the following syntax: `<?format_date:fieldname;MASK?>`
  - To display month name based on month number, use the following syntax in your layout:
 

```
<?xdoxslt:month_name(month, [abbreviate?], $_XDOLOCALE)?>
```

where `month` is the numeric value of the month (January = 1) and `[abbreviate?]` is the value 0 for do not abbreviate or 1 for abbreviate.

For example:

```
<?xdoxslt:month_name(1, 0, $_XDOLOCALE)?>
```

returns January
  - To add an expression in the data model, use the following expression:
 

```
Format_date(date, format_String)
```

For example:

```
SUBSTRING(FORMAT_DATE(G_1.SYSDATE,MEDIUM),0,3)
```

returns Nov (when the current SYSTDATE is November)

## Create a Data Set Using an LDAP Query

You can use Lightweight Directory Access protocol (LDAP) data sources.

You can query user information stored in LDAP directories and then use the data model editor to link the user information with data retrieved from other data sources.

For example, to generate a report that lists employee salary information that is stored in the database application and also include employee e-mail addresses that are stored in the LDAP directory in the report, you can create a query against each and then link the two in the data model editor to display the information in a single report. The figure below shows a sample LDAP query.

The screenshot shows a dialog box titled "New Data Set - LDAP Query". It contains the following fields and values:

- Name:** LDAP Data Set
- Data Source:** ldap11 (with a refresh icon)
- Search Base:** (empty)
- Attributes:** mail, cn, givenName
- Filter:** (objectclass=person)

At the bottom of the dialog are three buttons: "Help", "OK", and "Cancel".

To create a data set using an LDAP query:

1. Click the **New Data Set** toolbar button and select **LDAP Query**.
2. In the New Data Set - LDAP Query dialog, enter a name for this data set.
3. Select the **Data Source** for this data set.
4. In the **Search Base** field, enter the starting point for the search in the directory tree.

Search Base is required when the LDAP provider is Microsoft Active Directory. The Search Base defines the starting point of the search in the directory tree. For example, if you want to query the entire directory, specify the root.

To specify the starting point, enter each hierarchical object separated by a comma, starting with the lowest level in the hierarchy, for example, to search the Sales container in the *mycompany.com* domain, enter:

`ou=Sales,dc=mycompany,dc=com`

5. In the **Attributes** entry box, enter the attributes whose values you want to fetch from the LDAP data source.

For example: mail,cn,givenName

6. To filter the query, enter the appropriate syntax in the **Filter** entry box. The syntax is as follows:

(Operator (Filter)through(Filter))

For example: (objectclass=person)

LDAP search filters are defined in the Internet Engineering Task Force (IETF) Request for Comments document 2254 (RFC 2254) on the IETF Web site.

7. Link the data from this query to the data from other queries or modify the output structure.

## Create a Dataset Using a MDX Query Against an OLAP Data Source

Publisher supports Multidimensional Expressions (MDX) queries against OLAP data sources.

MDX enables you to query multidimensional objects, such as Essbase cubes, and return multidimensional cell sets that contain the cube's data. You create MDX queries by manually entering the MDX query or by using MDX Query Builder to build the query.

- [Create a Dataset Using a MDX Query](#)
- [Use MDX Query Builder](#)

### Create a Dataset Using a MDX Query

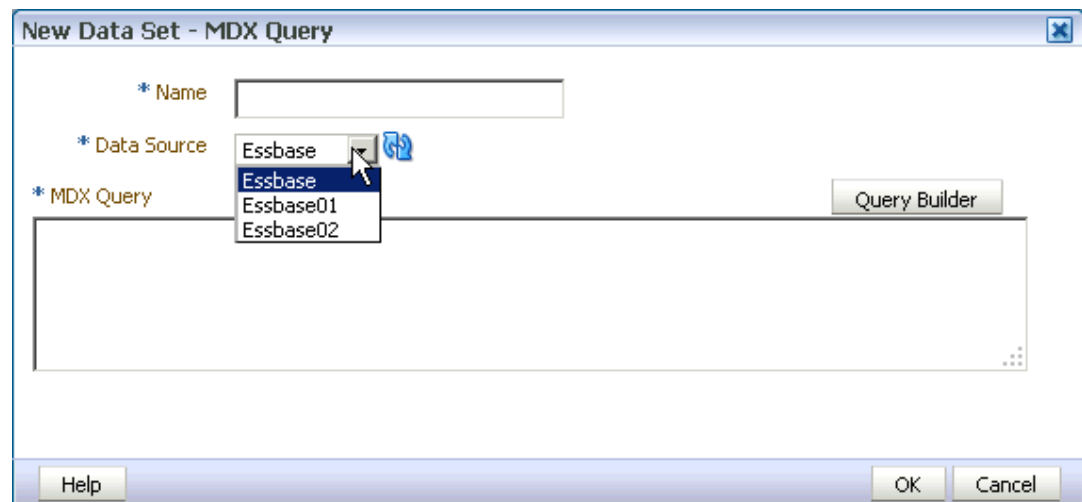
You create MDX queries either by manually entering the MDX query or by using MDX Query Builder to build the query.

In your OLAP data source, do not use Unicode characters from the range U+F900 to U+FFFE to define any metadata attributes such as column names or table names. This Unicode range includes half-width Japanese Katakana and full-width ASCII variants. Using these characters results in errors when generating the XML data for a pixel-perfect report.

To create a dataset using a MDX query:

1. On the toolbar, click **New Dataset** and then select **MDX Query**.

The New Dataset - MDX Query dialog is shown below.





2. Enter a name for the dataset.
3. Select the data source for the dataset. Only the data sources defined as OLAP connections are displayed in the list.  
  
Any private OLAP data source connections that you created will also be available in the Data Source drop-down list.
4. Enter the MDX query or click **Query Builder**.
5. Click **OK** to save. The data model editor validates the query.

## Use MDX Query Builder

Use MDX Query Builder to build MDX basic queries without having to code them. MDX Query Builder enables you to add dimensions to columns, rows, pages, and point of view axes and preview the query results.

MDX Query Builder only enables you to build datasets against Essbase data sources. For all other OLAP data sources, you must manually create the query.

- [Understand the MDX Query Builder Process](#)
- [Use the Select Cube Dialog](#)
- [Select Dimensions and Measures](#)
- [Perform MDX Query Actions](#)
- [Apply MDX Query Filters](#)
- [Select MDX Query Options and Save MDX Queries](#)

## Understand the MDX Query Builder Process

You create MDX queries either by manually entering the MDX query or by using MDX Query Builder to build the query.

To use MDX Query Builder to build a MDX query:

1. On the toolbar, click **New Dataset** and then select **MDX Query** to launch the New Dataset - MDX Query dialog.
2. Enter a name for the dataset.
3. Select a data source.
4. Launch MDX Query Builder.
5. Select an Essbase cube for the query.
6. Select dimensions and measures by dragging and dropping them to the Columns, Rows, Slicer/POV, and the Pages axes.
7. Optional: Use actions to modify the query.
8. Optional: Apply filters.
9. Set the query options and save the query.

## Use the Select Cube Dialog

In the Select Cube dialog, select the Essbase cube that you want to use to build the MDX query.

The MDX data source connection that you selected previously drives which Essbase cubes are available for selection.

## Select Dimensions and Measures

You build MDX queries by selecting dimensions for the Columns, Rows, Slicer/POV, and Pages axes.

Account dimension members are listed individually by member name. All other dimension members are represented by generation name as shown below.

You can drag dimension generations and individual measures from the Account dimension to the Columns, Rows, Slicer/POV, and Pages axes.

The screenshot shows the Oracle Analytics Server Select Cube dialog. The Dimensions panel on the left lists various dimensions and measures. The Columns, Rows, Slicer/POV, and Pages sections show the selected dimensions for the query. The MDX query text is displayed in the center, and a data table is shown at the bottom for the month of January.

		East	West	South
Stereo	Margin	1,239.00	1,680.00	
	Sales	2,950.00	4,000.00	
	Total_Expenses	1,145.00	1,580.00	
Compact_Disc	Margin	2,139.00	2,914.00	
	Sales	3,450.00	4,700.00	
	Total_Expenses	1,040.00	1,250.00	
Television	Margin	2,880.00	3,060.00	2,040.00
	Sales	4,800.00	5,100.00	3,400.00
	Total_Expenses	1,640.00	1,900.00	1,220.00
VCR	Margin	2,646.00	2,851.00	2,142.00
	Sales	4,200.00	4,650.00	3,400.00
	Total_Expenses	1,180.00	1,415.00	895.00
Camera	Margin	2,023.00	2,874.50	1,707.00
	Sales	2,850.00	4,050.00	2,400.00
	Total_Expenses	1,495.00	1,856.00	1,301.00

Build the query by dragging dimension members or measures from the Dimensions panel to one of the following axes areas:

- **Columns**— Axis (0) of the query
- **Rows** — Axis (1) of the query
- **Slicer/POV**— The slicer axis enables you to limit a query to only a specific slice of the Essbase cube. This represents the optional WHERE clause of a query.
- **Pages** — Axis (2) of the query

You can nest dimension members in the Columns and Rows axes, but you can only add a single dimension to the Slider/POV axis.

## Add Dimension Members to the Slicer/POV Axis

When you add a dimension to the Slicer/POV axis, the Member Selection dialog launches.

You can only select one dimension member for this axis. Simply select the dimension in the Member Selection dialog, and then click **OK**.

The Member Selection dialog doesn't display if you add a measure to the Slicer/POV axis.

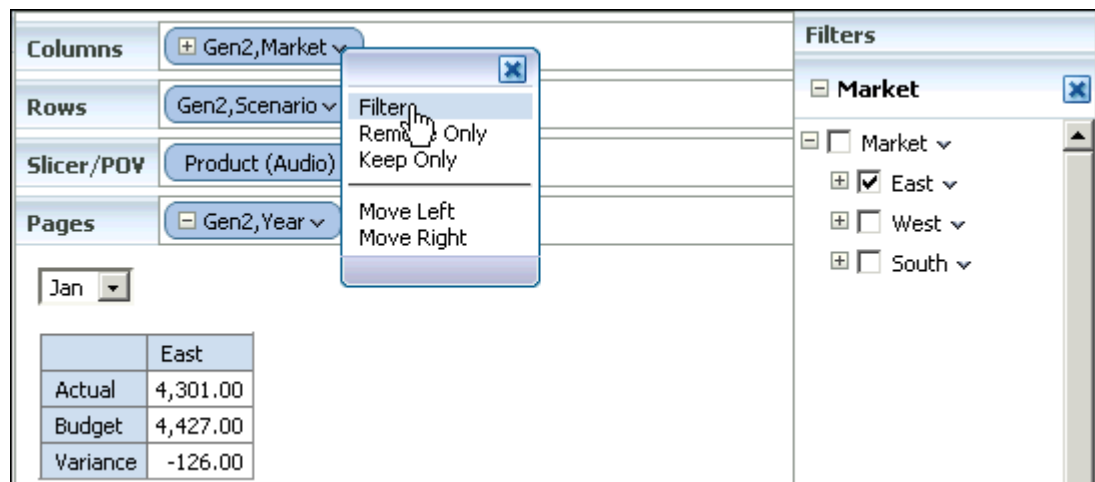
## Perform MDX Query Actions

The MDX Query Builder toolbar contains the following buttons for modifying the MDX query:

- Click **Swap Rows and Columns** to flip dimensions between columns and rows.
- Click **Actions** to display the following menu items for selection:
  - **Select Cube** - Selects a different Essbase cube for the query.
  - **Set Alias Table** - Selects the alias table used for dimension display names. Alias names are used for display only and are not used in the query.
  - **Auto Refresh** - Displays the results as dimension members are placed in the Columns, Rows, Slicer/POV, and Pages axes and automatically refreshes the MDX query syntax.
  - **Clear Results** - Clears the results and removes member selections from all of the axes and any filters added to the query.
  - **Show Empty Columns** - Displays columns that do not contain data.
  - **Show Empty Rows** - Displays rows that do not contain data.
  - **Show Query** - Displays the MDX query syntax resulting from how the dimensions are placed in the Columns, Rows, Slicer/POV, and Pages axes.

## Apply MDX Query Filters

You can create filters for dimensions on the Columns, Rows, and Pages axes in MDX Query Builder to further streamline your MDX query.



You can create multiple filters for a query, but you can only create one filter for each Columns, Rows, or Pages axis.

- To create a filter, click the down-arrow button to the right of a dimension in the Columns, Rows, or Pages axes to display it in the Filters area. You create the filter by selecting the desired dimension member as shown below.

## Select MDX Query Options and Save MDX Queries

Use the Options dialog to select the dimension properties to include in the query for each of the dimensions in the Columns, Rows, and Pages axes.

To select the MDX query options and save the query:

1. Once you've built the query, click **Save** to display the Options dialog.
2. Select the dimension properties.

The dimension properties are as follows:

- **Member Alias** — Dimension member alias names as listed in the Essbase outline.
- **Ancestor Names** — Ancestor dimension names as listed in the Essbase outline.
- **Level Number** — Dimension level numbers as listed in the Essbase outline.
- **Gen Number** — Generation number of the dimensions as listed in the Essbase outline.

For example, if you select the Member Alias and Level Number properties for Columns, the MDX query results are as follows:

```
SELECT
NON EMPTY Hierarchize([Market].Generations(2).Members)
PROPERTIES MEMBER_ALIAS,LEVEL_NUMBER ON Axis(0),
NON EMPTY CROSSJOIN(Hierarchize([Product].Generations(3).Members),
{[Accounts].[Margin],[Accounts].[Sales],[Accounts].[Total_Expenses]}) ON Axis(1),
NON EMPTY [Year].Generations(3).Members ON Axis(2) FROM Demo.Basic
```

3. Click **OK** to return to the New Dataset - MDX Query dialog and review the MDX query output as shown below.
4. Click **OK** to return to the data model editor, and save your changes.

If you modify a MDX query after you save it in Publisher, Oracle recommends that you manually change the syntax and not use MDX Query Builder to do so.

## Create a Dataset Using an Analysis

You can use the Oracle BI Presentation Catalog to select an analysis as a data source.

An analysis is a query against an organization's data that provides answers to business questions. A query contains the underlying SQL statements that are issued to the Oracle BI Server.

Hierarchical columns aren't supported in Publisher data models.

Create a dataset using an analysis:

1. Click the **New Dataset** toolbar button and select **Analysis**.
2. In the New Dataset - Analysis dialog, enter a name for this dataset.

3. Click the browse icon to connect to the Oracle BI Presentation Catalog.
4. When the catalog connection dialog launches, navigate through the folders to select the analysis to use as the dataset for the report.
5. Enter a **Time Out** value in seconds. If Publisher hasn't received the analysis data after the time specified in the time out value has elapsed, then Publisher stops attempting to retrieve the analysis data.
6. Click **OK**.

## Additional Notes on Analysis Datasets

Parameters and lists of values are inherited from the analysis and are displayed at runtime.

The analysis must have default values defined for filter variables. If the analysis contains presentation variables with no default values, then you can't use it as a data source for reports in Publisher.

You can't use group breaks, group filters, data links and group-level functions when structuring data based on datasets for an analysis. You can use global-level functions and you can set values for null elements.

## Create a Data Set Using a View Object

Publisher enables you to connect to your custom applications built with Oracle Application Development Framework and use view objects in your applications as data sources for reports.

Performance of the query execution is better as the SQL is executed directly against the database.

Before you can create an Publisher data model using a view object, you must first create the view object in your application.

1. Click the **New Data Set** toolbar button and select **View Object**.
2. In the New Data Set - View Object dialog, enter a name for this data set.
3. Select the Data Source from the list. The data sources that you defined in the providers.xml file display.
4. Do one of the following:
  - Select **Yes** for **Execute as SQL** to extract the SQL query form the View Object and execute it on the Oracle Analytics Server domain.
  - Select **No** to execute the view object on the Oracle Applications domain through the ADF layer. The XML data is then streamed to the Oracle Analytics Server domain in chunks. This method results in poorer performance, but enables execution on the Applications domain. You can invoke some service interface layers to allow custom data manipulation.
5. Enter the fully qualified name of the application module, for example, example.apps.pa.entity.applicationModule.AppModuleAM.
6. Click **Load View Objects**.

Publisher calls the application module to load the view object list.
7. Select the **View Object**.

Any bind variables defined are retrieved.

8. Create a parameter to map to this bind variable.
9. Click **OK** to save your data set.

## Additional Notes on View Object Data Sets

To structure data based on view object data sets, the group breaks, data links and group-level functions aren't supported.

You can set the **Value if Null** property of the elements. See [Set Element Properties](#).

## Create a Dataset Using a Web Service

You can use datasets that use simple and complex web service data sources to return valid XML data. Only document or literal web services are supported.

Define your parameters first, so that the methods are available for selection when setting up the data source. The parameters must be set up in the Parameters section of the report definition.

Multiple parameters are supported. Ensure the method name is correct and the order of the parameters matches the order in the method. To call a method in the web service that accepts two parameters, you must map two parameters defined in the report to the two parameters in the method. Note that only parameters of simple type are supported, for example, string and integer.

## Web Service Data Source Options

Administrator can set up a web service data as a data source.

Administrator can set up connections to web service data sources and then you can use the data source in multiple data models. You must set up the connection before you create the data model.

Publisher supports datasets that use simple and complex web service data sources to return valid XML data.

## Create a Dataset Using a Simple Web Service

If you aren't familiar with the available methods and parameters in the web service to call, you can open the URL in a browser to view them.

To create a dataset by using a simple web service:

1. Click the **New Dataset** toolbar button, and then select **Web Service**.
2. Enter the dataset name.
3. Select the data source and the method.
4. Click **OK**.
5. On the Data Model pane, select **Parameters**, click **Create New Parameter**, and define the parameters to make them available to the web service dataset.
6. Edit the web service dataset and add the parameters to the dataset.
7. Click **Save**.

## Create a Dataset Using a Complex Web Service

You can use complex web service data sources to return valid XML data. A complex web service type internally uses `soapRequest /soapEnvelope` to pass the parameter values to the destination host.

To create a dataset by using a complex web service:

1. Click the **New Dataset** toolbar button, and then select **Web Service**.
2. Enter the dataset name, data source, and the method.

The methods available for selection are based on the complex web service data source. When you select a method, the **Parameters** are displayed. To view optional parameters, select **Show optional parameters**.

If you aren't familiar with the available methods and parameters in the web service, open the WSDL URL in a browser to view them.

3. If the start of the XML data for the report is deeply embedded in the response XML generated by the web service request, in the **Response Data XPath** field, specify the path to the data to use in the report.
4. Add the parameters required for the web service.
5. Test the web service.

## Additional Information on Web Service Datasets

There's no metadata available from web service datasets, therefore grouping and linking aren't supported.

## Create a Dataset Using a XML File

You can use an XML file to create a data source.

Do one of the following:

- Place the XML file in a directory that your administrator has set up as a data source.
- Upload the XML file to the data model from a local directory.

To use layout editor and interactive viewer, save sample data from the XML file source to the data model.

## About Supported XML Files

Support of XML files as a dataset type in Publisher follows certain guidelines.

- The XML files that you use as input to the Publisher data engine must be UTF-8 encoded.
- Do not use the following characters in XML tag names: ~, !, #, \$, %, ^, &, \*, +, `, |, :, \", \\, <, >, ?, ,, /. If your data source file contains any of these characters, use the data model editor Structure tab to change the tag names to an acceptable one.
- Use valid XML files. Oracle provides many utilities and methods for validating XML files.
- There's no metadata available from XML file datasets, therefore grouping and linking are not supported.

## Upload a XML File Stored Locally

You can create datasets using locally stored XML files.

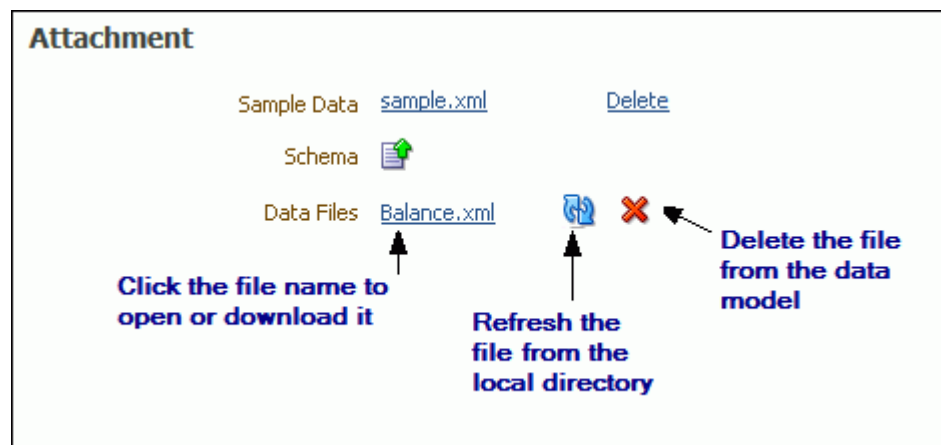
To create a dataset using a XML file stored locally:

1. On the toolbar, click **New Dataset** and select **XML File**.
2. Enter a name for this dataset.
3. Select **Local** to enable the Upload button.
4. Click **Upload** next to the **File Name** field to browse and upload the XML file from a local directory. If the file has been uploaded to the data model, you can select it from the **File Name** list.
5. Click **Upload**.
6. Click **OK**.
7. (Required) Save sample data to the data model.

## Refresh and Delete an Uploaded XML File

You can refresh and delete uploaded local XML files.

After uploading the file, it's displayed on the **Properties** pane of the data model under the **Attachments** region, as shown below.



To refresh the local file in the data model:

1. In the component pane, click **Data Model** to view the Properties page.
2. In the **Attachment** region of the page, locate the file in the **Data Files** list.
3. Click **Refresh**.
4. In the Upload dialog, browse for and upload the latest version of the file. The file must have the same name or it won't replace the older version.
5. Save the data model.

To delete the local file:



1. In the component pane, click **Data Model** to view the Properties page.
2. In the **Attachment** region of the page, locate the file in the Data Files list.
3. Click **Delete**.
4. Click **OK** to confirm.
5. Save the data model.

## Create a Dataset Using a Content Server

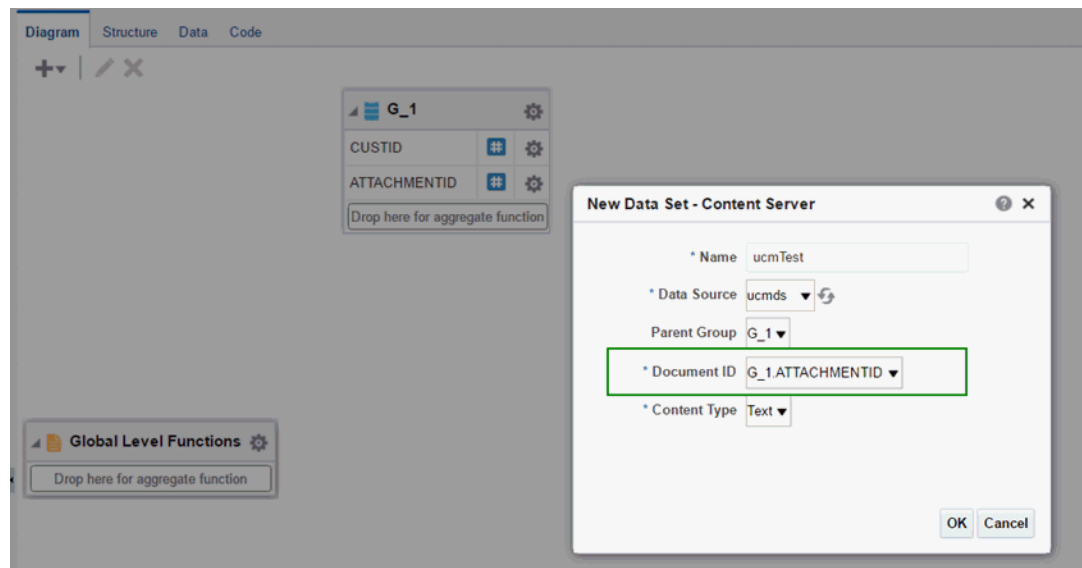
You can set up connections to Content Server data source on the Administration page and then use that in multiple data models.

You must set up the connection before you create a data model. Create a data model by creating the SQL Query dataset (required) first and then create the Content Server dataset.

1. Click the New Dataset toolbar button and select **Content Server**.

In the New Dataset, Content Server dialog do the following:

2. Enter a name for the dataset in the **Name** field.
3. Select the content server data source in the **Data Source** field.
4. Select the **Parent Group** from the LOV.
5. Select the **Document ID** from the LOV.
6. Select the **Content Type** from the LOV.



7. Click **OK**.

## Create a Dataset Using a Microsoft Excel File

These topics describe requirements, options, and procedures for using Microsoft Excel files as a data source.

- [About Supported Excel Files](#)
- [Access Multiple Tables per Sheet](#)

## About Supported Excel Files

Support of Microsoft Excel files as a dataset type in Publisher follows certain guidelines.

- Save Microsoft Excel files in the Excel 97-2003 Workbook (\*.xls) format by Microsoft Excel. Files created by a third party application or library are not supported.
- The source Excel file can contain a single sheet or multiple sheets.
- Each worksheet can contain one or multiple tables. A table is a block of data that is located in the continuous rows and columns of a sheet.

In each table, Publisher always considers the first row to be the heading row for the table.

- The first row under the heading row must not be empty and is used to determine the column type of the table. The data type of the data in the table may be number, text, or date/time.
- If multiple tables exist in a single worksheet, the tables must be identified with a name for Publisher to recognize each one. See [Access Multiple Tables per Sheet](#).
- If all tables in the Excel file are not named, only the data in the first table is recognized and fetched.
- When the dataset is created, Publisher truncates all trailing zeros after the decimal point for numbers in all cases. To preserve the trailing zeros in your final report, you must apply a format mask in your template to display the zeroes.
- Single value parameters are supported, but multiple value parameters are not supported.

## Access Multiple Tables per Sheet

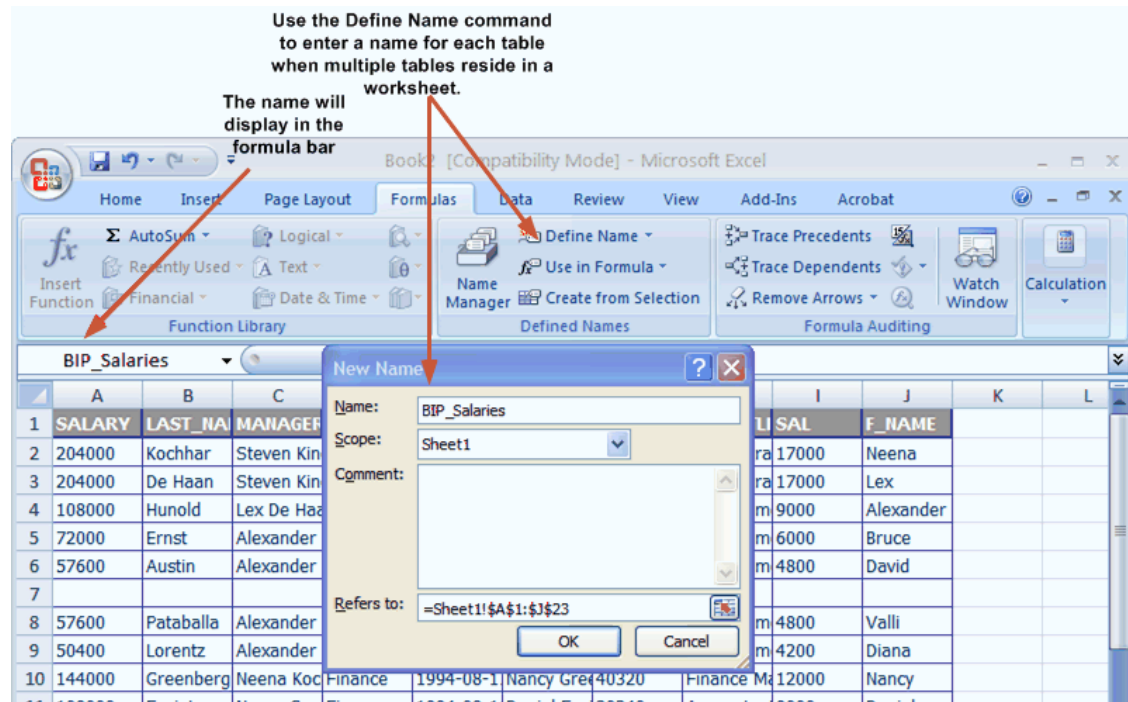
If the Microsoft Excel worksheet contains multiple tables that you want to include as data sources, then you must define a name for each table in Microsoft Excel.

The name that you define must begin with the prefix: *BIP\_*, for example, *BIP\_SALARIES*.

To access multiple tables per sheet:

1. Insert the table in Microsoft Excel.
2. Select the table and define a name that is prefixed with *BIP\_*.

For example, you could use the Define Name command in Microsoft Excel 2007 to name a table *BIP\_Salaries*.



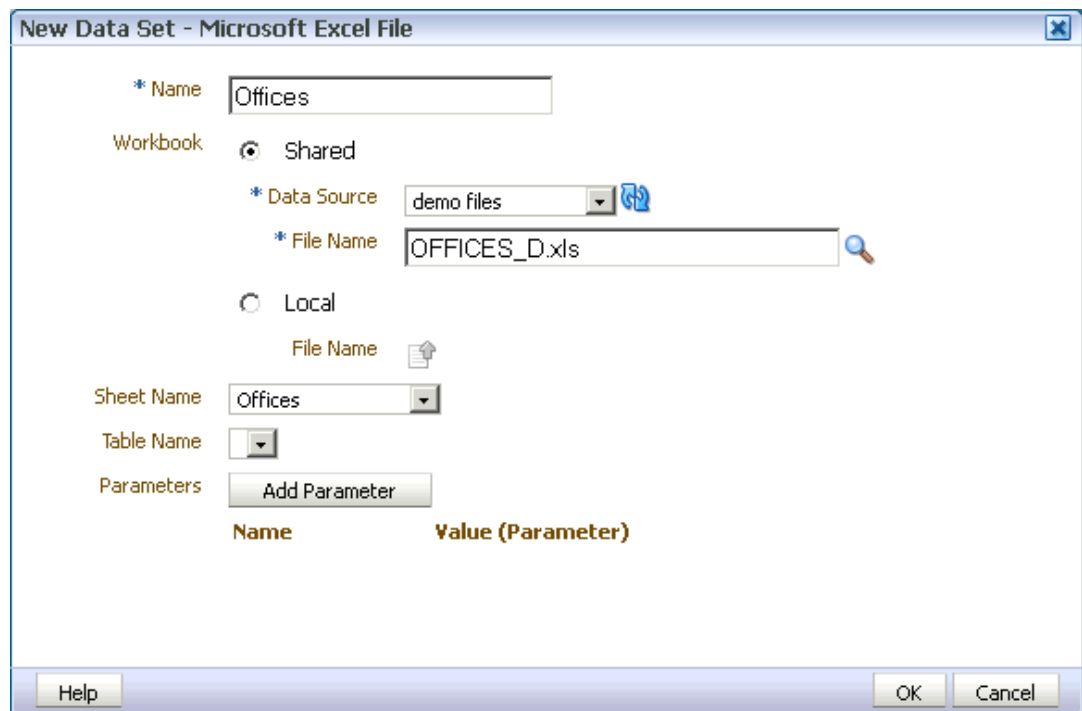
## Use a Microsoft Excel File Stored in a File Directory Data Source

Create datasets using Microsoft Excel files stored in file directories.

Note that to include parameters for your dataset, you define the parameters first, so that they're available for selection when defining the dataset. The Excel dataset type supports one value per parameter. It doesn't support multiple selection for parameters.

To create a dataset using a Microsoft Excel file from a file directory data source:

1. Click the **New Dataset** toolbar button and select **Microsoft Excel File**. The New Dataset - Microsoft Excel File dialog launches.
2. Enter a name for this dataset.
3. Click **Shared** to enable the Data Source list.
4. Select the data source where the Microsoft Excel File resides.
5. To the right of the **File Name** field, click the browse icon to browse for the Microsoft Excel file in the data source directories. Select the file.
6. If the Excel file contains multiple sheets or tables, select the appropriate **Sheet Name** and **Table Name** for this dataset, as shown below.



7. If you added parameters for this dataset, click **Add Parameter**. Enter the **Name** and select the **Value**. The Value list is populated by the parameter Name defined in the Parameters section. Only single value parameters are supported.
8. Click **OK**.
9. Link the data from this query to the data from other queries or modify the output structure.

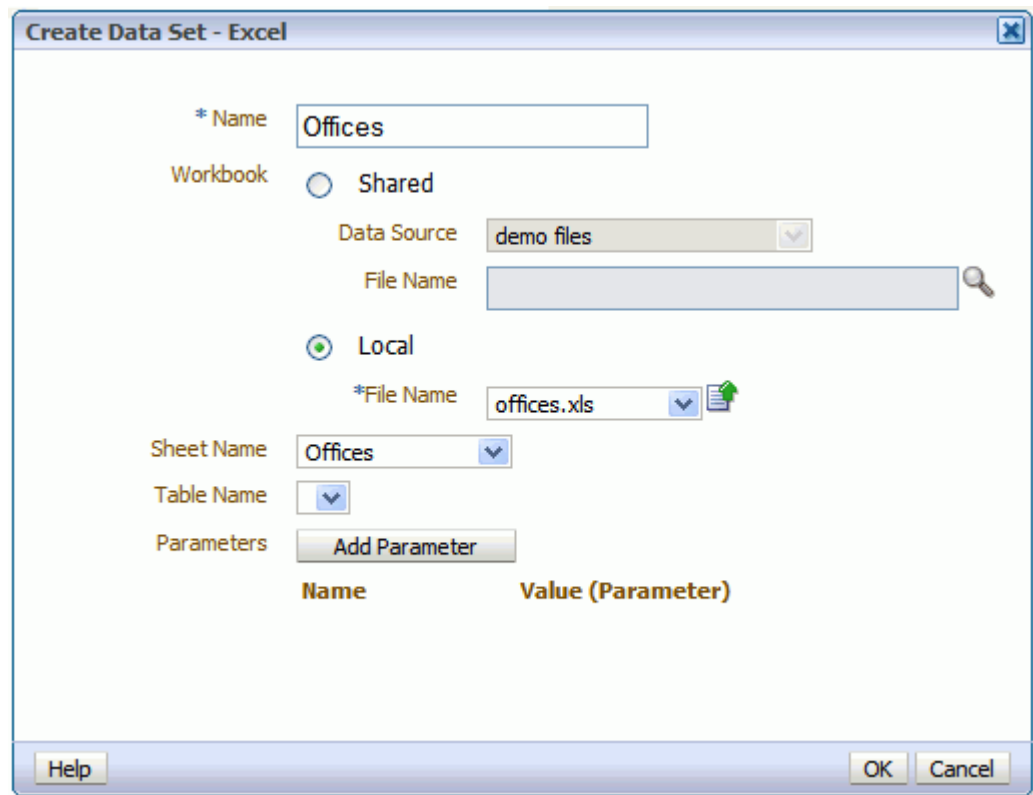
## Upload a Microsoft Excel File Stored Locally

To use a local Microsoft Excel file as a data source, you first upload it.

Note that to include parameters for the dataset, you define the parameters first, so that they're available for selection when defining the dataset. The Excel dataset type supports one value per parameter. It doesn't support multiple selection for parameters.

To create a dataset using a Microsoft Excel file stored locally:

1. Click the **New Dataset** toolbar button and select Microsoft Excel File. The Create Dataset - Excel dialog launches.
2. Enter a name for this dataset.
3. Select **Local** to enable the upload button.
4. Click the **Upload** icon to browse for and upload the Microsoft Excel file from a local directory. If the file has been uploaded to the data model, you can select it from the **File Name** list.
5. If the Excel file contains multiple sheets or tables, select the appropriate **Sheet Name** and **Table Name** for this dataset, as shown below.

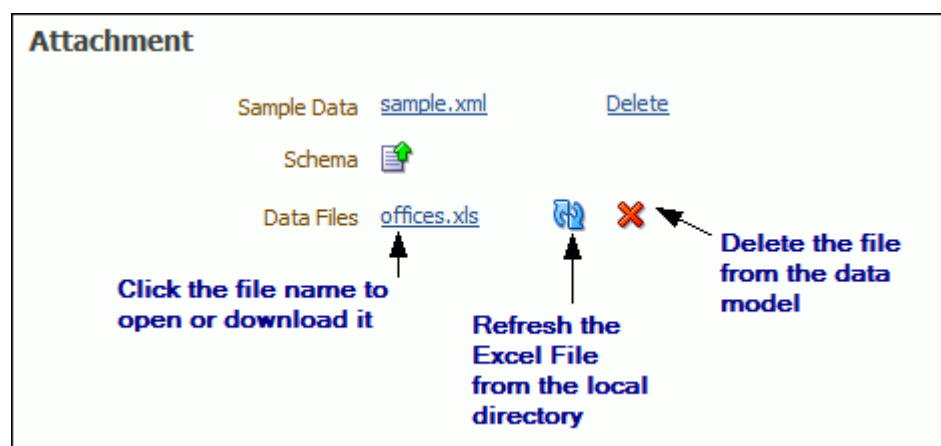


6. If you added parameters for this dataset, click **Add Parameter**. Enter the **Name** and select the **Value**. The **Value** list is populated by the parameter **Name** defined in the **Parameters** section. Only single value parameters are supported.
7. Click **OK**.
8. Link the data from this query to the data from other queries or modify the output structure.

## Refresh and Delete an Uploaded Excel File

You can refresh and delete uploaded local Excel files.

After uploading the file, it's displayed on the **Properties** pane of the data model under the **Attachments** region, as shown below.



To refresh the local file in the data model:

1. Click **Data Model** in the component pane to view the **Properties** page.
2. In the **Attachment** region of the page, locate the file in the **Data Files** list.
3. Click **Refresh**.
4. In the **Upload** dialog, browse for and upload the latest version of the file. The file must have the same name or it won't replace the older version.
5. Save the data model.

To delete the local file:

1. Click **Data Model** in the component pane to view the **Properties** page.
2. In the **Attachment** region of the page, locate the file in the **Data Files** list.
3. Click **Delete**.
4. Click **OK** to confirm.
5. Save the data model.

## Create a Dataset Using a CSV File

Publisher supports datasets that use CSV file data sources to return valid XML data.

The following topics describe using requirements and procedures for using a CSV as a data source:

- [About Supported CSV Files](#)
- [Create a Dataset from a Centrally Stored CSV File](#)
- [Upload a CSV File Stored Locally](#)

## About Supported CSV Files

Support of CSV files as a dataset type in Publisher follow certain guidelines.

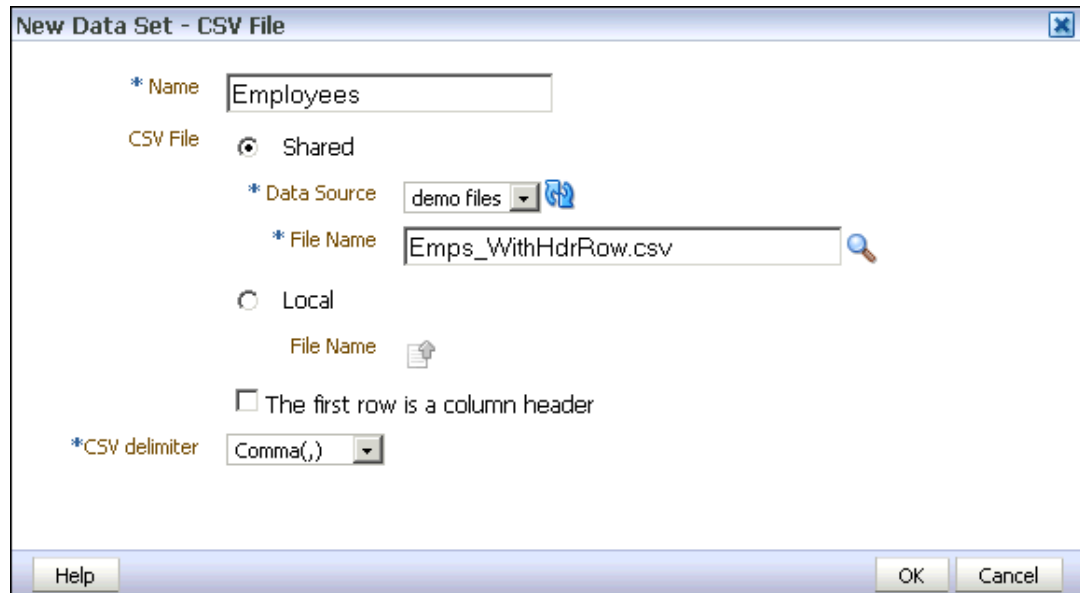
- You can use a CSV file that is located in a directory that your administrator has set up as a data source.  
You can upload a file from a local directory.
- The supported CSV file delimiters are Comma, Pipe, Semicolon, and Tab.
- If your CSV file contains headers, the header names are used as the XML tag names. The following characters aren't supported in XML tag names: ~, !, #, \$, %, ^, &, \*, +, `, |, :, \", \\, <, >, ?, ,, /. If your data source file contains any of these characters in a header name, use the data model editor Structure tab to edit the tag names.
- CSV datasets support editing the data type assigned by the data model editor. See [Edit the Data Type](#). If you update the data type for an element in the dataset, you must ensure that the data in the file is compliant with the data type that you selected.
- The CSV files that you use as input to the Publisher data engine must be UTF-8 encoded and cannot contain empty column headers.
- Group breaks, data links, expression and group-level functions aren't supported.
- Data fields in CSV files must use the canonical ISO date format for mapped date elements, for example, 2012-01-01T10:30:00-07:00, and #####.## for mapped number elements.

- CSV files aren't validated.

## Create a Dataset from a Centrally Stored CSV File

You can use a CSV file from a file directory to create a dataset.

1. On the data model editor toolbar, click **New Dataset** and select **CSV File**. The New Dataset - CSV File dialog launches.



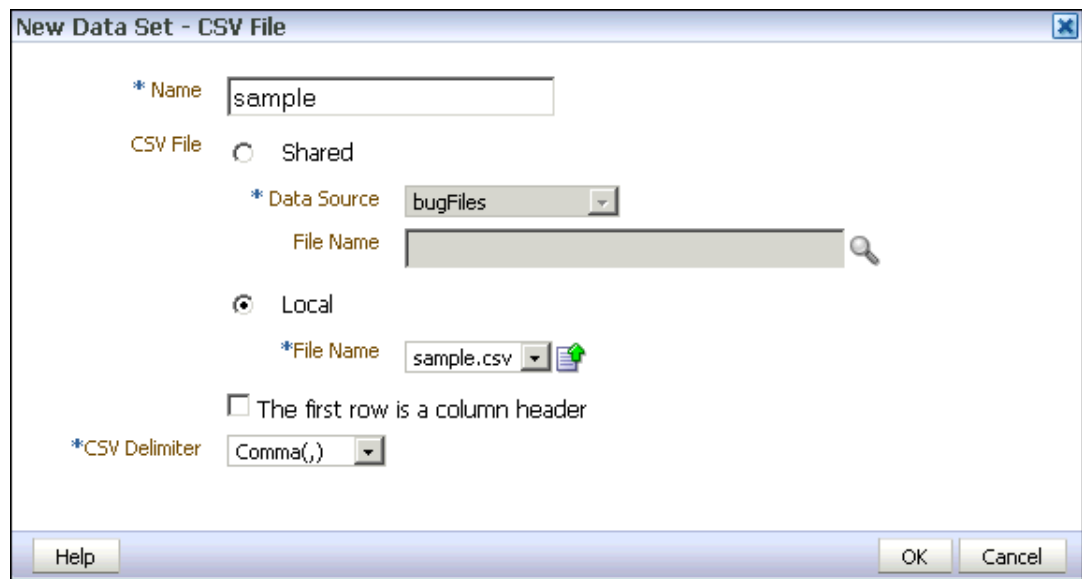
2. Enter a name for this dataset.
3. Click **Shared** to enable the Data Source list.
4. Select the **Data Source** where the CSV file resides.  
The list is populated from the configured File Data Source connections.
5. Click **Browse** to connect to the data source, browse the available directories, and select the file.
6. Select **The first row a column header** to specify if the first row in the file contains column names.  
If you do not select this option, the columns are assigned a generic name, for example, *Column1*, *Column2*. You can edit the XML tag names and display names in the data model editor Structure tab.
7. Select the **CSV delimiter** used in the file.  
The default selection is Comma (,).
8. Click **OK**.

## Upload a CSV File Stored Locally

Create datasets using CSV files stored in local file directories.

To create a dataset using a CSV file stored locally:

1. On the toolbar, click **New Dataset** and select **CSV File**. The New Dataset - CSV File dialog launches, as shown below.



2. Enter a name for this dataset.
3. Select **Local** to enable the Upload button.
4. Click **Upload** to browse for and upload the CSV file from a local directory.
5. Optional: Select **The first row a column header** to specify if the first row in the file contains column names. If you don't select this option, the columns are assigned a generic name, for example, Column1, Column2. The XML tag names and display names assigned can be edited in the data model editor Structure tab.
6. Select the **CSV Delimiter** used in the file. The default selection is Comma (,).
7. Click **OK**.

## Edit the Data Type

After uploading a CSV file data type, you can edit it as needed.

To edit the data type for a CSV file element, click the data type icon or update it from the element Properties dialog.

The data for an element must be compliant with the data type that you assign. The user interface doesn't validate the data when you update the data type. If the data doesn't match, for example, a string value is present for an element you defined as Integer, errors may occur in the layout editing tools and or at runtime.

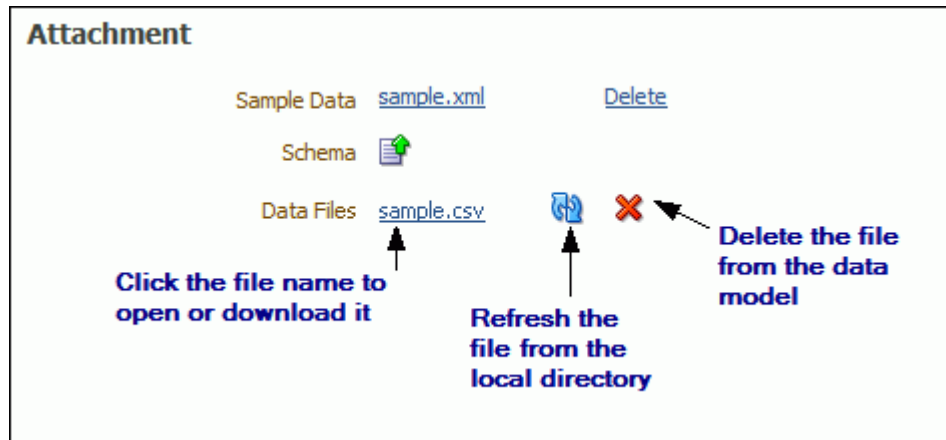
You can only update the data types for CSV file data sources.

## Refresh and Delete an Uploaded CSV File

You can refresh and delete uploaded local CSV files.

After uploading the file, it is displayed on the Properties pane of the data model under the Attachments region, as shown below.





To refresh the local file in the data model:

1. In the component pane, click **Data Model** to view the Properties page.
2. In the Attachment region of the page, locate the file in the Data Files list.
3. Click **Refresh**.
4. In the Upload dialog, browse for and upload the latest version of the file. The file must have the same name or it won't replace the older version.
5. Save the data model.

To delete the local file:

1. In the component pane, click **Data Model** to view the Properties page.
2. In the Attachment region of the page, locate the file in the Data Files list.
3. Click **Delete**.
4. Click **OK** to confirm.
5. Save the data model.

## Create a Dataset from an HTTP XML Feed

Using the HTTP (XML Feed) dataset type, you can create data models from RSS and XML feeds over the Web by retrieving data through the HTTP GET method.

To include parameters for the dataset, it's recommended that you define the parameters first, so that they're available for selection when you define the dataset. See [Add Parameters and Lists of Values](#).

There's no metadata available from HTTP XML feed datasets, therefore grouping and linking aren't supported.

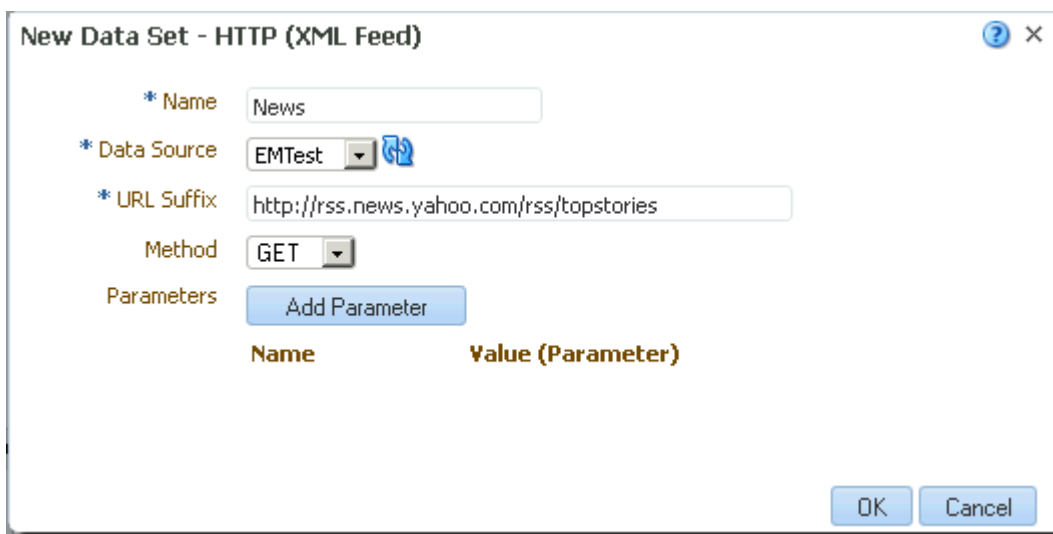
You might require additional configuration to access external data source feeds depending on your system's security. For example, if the RSS feed is protected by Secure Sockets Layer (SSL).

## Create a Dataset from an HTTP XML Dataset

You can set up an HTTP (XML Feed) data sources in two different ways.

After the administrator sets up the connections to HTTP data sources, you can use this data source in multiple data models.

1. On the toolbar, click **New Dataset** and select **HTTP (XML Feed)**. The New Dataset - HTTP (XML Feed) dialog launches, as shown below.



2. Enter a name for this dataset.
3. Select a data source.
4. Enter the URL Suffix for the source of the RSS or XML feed.
5. Select the method GET or POST.
6. To add a parameter, click **Add Parameter**. Enter the **Name** and select the **Value**. The **Value** list is populated by the parameter **Name** defined in the **Parameters** section.
7. Click **OK** to close the dataset dialog.

## Use Data Stored as a Character Large Object (CLOB) in a Data Model

Publisher supports using data stored as a character large object (CLOB) data type in your data models. This feature enables you to use XML data generated by a separate process and stored in your database as input to a Publisher data model.

Use the Query Builder to retrieve the column in your SQL query, then use the data model editor to specify how you want the data structured. When the data model is executed, the data engine can structure the data either as:

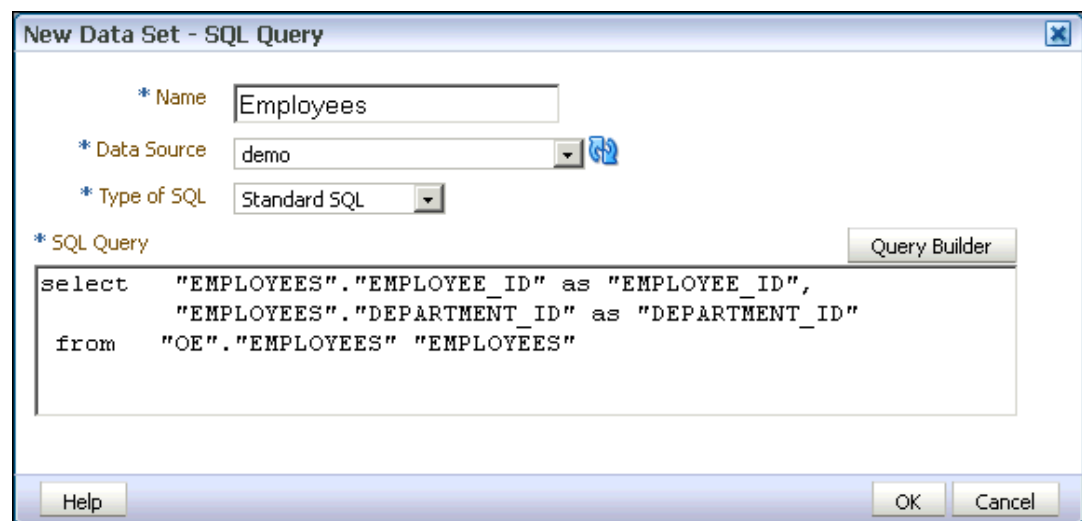
- A plain character set within an XML tag name that can be displayed in a report (for example, an Item Description)
- Structured XML

Ensure that your data doesn't include line feeds or carriage returns. Line feeds and carriage returns in your data may not render as expected in the report layouts.

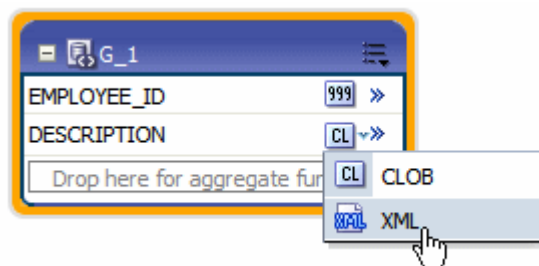
To create a dataset from data stored as a CLOB:

1. On the toolbar, click **New Dataset** and then select **SQL Query**. The New Dataset - SQL Query dialog launches.
2. Enter a name for the dataset.
3. If you are not using the default data source for this dataset, select the **Data Source** from the list.
4. Enter the SQL query or use the **Query Builder** to construct your query to retrieve the CLOB data column.

For example, you could create a query in which the CLOB data is stored in a column named "DESCRIPTION".



5. After entering the query, click **OK** to save. Publisher validates the query.
6. By default, the data model editor assigns the CLOB column the "CLOB" data type. To change the data type to XML, click the data type icon and select XML.



## How the Data Is Returned

When you execute the query, if the CLOB column contains well-formed XML, and you select the XML data type, the data engine returns the XML data, structured within the CLOB column tag name.

**Example output when data type is XML:**

Note the <DESCRIPTION> element contains the XML data stored in the CLOB column, as shown below.

```

- <DATA_DS>
  - <G_1>
    <EMPLOYEE_ID>102</EMPLOYEE_ID>
    - <DESCRIPTION>
      - <DATA_DS>
        - <G_Q1>
          <DEPTNO>10</DEPTNO>
          <DNAME>PURCHASE</DNAME>
          <LOC>HQ</LOC>
        - <G_Q2>
          <DEPTNO_1>10</DEPTNO_1>
          <EMPNO>10001</EMPNO>
          <ENAME>SCOTT</ENAME>
          <SAL>5000</SAL>
        </G_Q2>
        + <G_Q2></G_Q2>
      </G_Q1>
    - <G_Q1>
      <DEPTNO>20</DEPTNO>
      <DNAME>FINANCE</DNAME>
      <LOC>HQ</LOC>

```

#### Example output when data type is CLOB:

If you select to return the data as the CLOB data type, the returned data is structured as shown below.

```

- <DATA_DS>
  - <G_1>
    <EMPLOYEE_ID>102</EMPLOYEE_ID>
    - <DESCRIPTION>
      <DATA_DS> <G_Q1> <DEPTNO>10</DEPTNO>
      <DNAME>PURCHASE</DNAME> <LOC>HQ</LOC> <G_Q2> <DEPTNO_1>10</DEPTNO_1>
      <EMPNO>10001</EMPNO> <ENAME>SCOTT</ENAME> <SAL>5000</SAL> </G_Q2> <G_Q2>
      <DEPTNO_1>10</DEPTNO_1> <EMPNO>10002</EMPNO> <ENAME>SMITH</ENAME>
      <SAL>3000</SAL> </G_Q2> </G_Q1> <G_Q1> <DEPTNO>20</DEPTNO>
      <DNAME>FINANCE</DNAME> <LOC>HQ</LOC> <G_Q2> <DEPTNO_1>20</DEPTNO_1>
      <EMPNO>10003</EMPNO> <ENAME>AMY</ENAME> <SAL>5500</SAL> </G_Q2> <G_Q2>
      <DEPTNO_1>20</DEPTNO_1> <EMPNO>10004</EMPNO> <ENAME>MARLIN</ENAME>
      <SAL>4000</SAL> </G_Q2> </G_Q1> <G_Q1> <DEPTNO>30</DEPTNO>
      <DNAME>CORPORATE</DNAME> <LOC>HQ</LOC> </G_Q1> <DATA_DS>
    </DESCRIPTION>
  </G_1>
</DATA_DS>

```

## Additional Notes on Datasets Using CLOB Column Data

More information is available on CLOB column data.

For specific notes on using CLOB column data in a bursting query, see [Add a Bursting Definition to Your Data Model with an SQL Query](#).

## Handle XHTML Data Stored in a CLOB Column

Data from the XHTML documents stored in a database CLOB column can render the markup in the generated report.

To enable the report rendering engine to handle the markup tags, you must wrap the XHTML data in a CDATA section within the XML report data that's passed by the data engine.

It's recommended that you store the data in the database wrapped with the CDATA section. You can then use a simple select statement to extract the data. If the data isn't wrapped in the CDATA section, then you must include in your SQL statement instructions to wrap it.

The following sections describe how to extract XHTML data in each case:

- [Retrieve XHTML Data Wrapped in CDATA](#)
- [Wrap the XHTML Data in CDATA in the Query](#)

Only the RTF templates support rendering of the HTML markup in a report.

## Retrieve XHTML Data Wrapped in CDATA

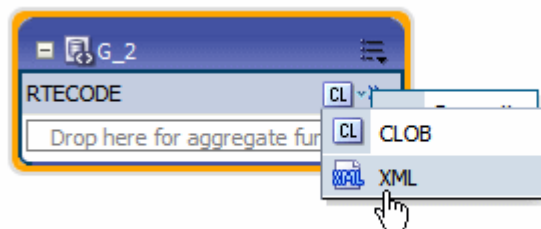
This exercise assumes you have the following data stored in a database column called "CLOB\_DATA".

```
<![CDATA[  
<p><font style="font-style: italic; font-weight: bold;" size="3">  
<a href="http://www.oracle.com">oracle</a></font> </p>  
<p><font size="6"><a href="http://docs.oracle.com/">Oracle Documentation</a>  
</font></p>  
]]>
```

Retrieve the column data using a simple SQL statement, for example:

```
select CLOB_DATA as "RTECODE" from MYTABLE
```

In the data model editor, set the data type of the **RTECODE** column to XML, as shown below.



## Wrap the XHTML Data in CDATA in the Query

This exercise assumes that you've the following data stored in a database column called "CLOB\_DATA".

```
<p><font style="font-style: italic; font-weight: bold;" size="3">  
<a href="http://www.oracle.com">oracle</a></font> </p>  
<p><font size="6"><a href="http://docs.oracle.com/">Oracle Documentation</a>  
</font></p>
```

Use the following syntax in your SQL query to retrieve it and wrap it in the CDATA section:

```
select '![CDATA' || '[' || CLOB_DATA || ']' as "RTECODE" from MYTABLE
```

In the data model editor, set the data type of the **RTECODE** column to XML.

## Test Data Models and Generate Sample Data

The data model editor enables you to test your data model and view the output to ensure your results are as expected.

After running a successful test, you can choose to save the test output as sample data for your data model. You can also use the Export feature to export sample data to a file. If your data model fails to run, you can view the data engine log.

To test your data model:

1. In the data model editor, select the **Data** tab, as shown below.



2. For SQL Query, Analysis, and View Object datasets: On the Data tab, select the number of rows to return. If you included parameters, enter the desired values for the test.
3. Click **View** to display the XML that is returned by the data model.
4. Select one of the following options to display the sample data:
  - Use **Tree View** to view the sample data in a data hierarchy. This is the default display option.
  - Use **Table View** to view the sample data in a formatted table like you see in the reports.

You can create a report based on this data model.

To save the test dataset as sample data for the data model:

1. After the data model has successfully run, click **Save as Sample Data**. The sample data is saved to the data model.

To export the test data:

1. For SQL Query, Analysis, and View Object datasets: On the Data tab, select the number of rows to return.
2. After the data model has successfully run, click **Export**. You are prompted to open or save the file to a local directory.

To view the engine log:

1. Click **View Engine Log**. You are prompted to open or save the file to a local directory. The data engine log file is an XML file.

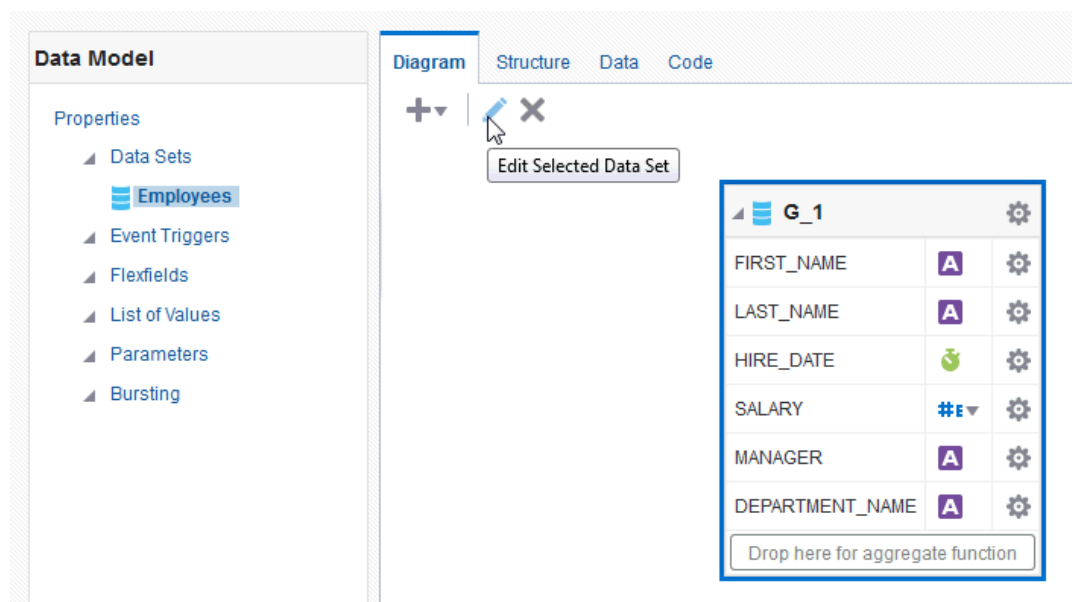
To test UCM dataset:

For Content Server, based on the document ID and the content type, the document content is retrieved from the content (UCM) server. However, if the Document ID is empty or null, then the document content will be empty.

## Edit Dataset

You can modify data models by editing the datasets of a data model.

1. On the component pane of the data model editor, click **Datasets**. All datasets of this data model is displayed.
2. Click the dataset that you want to edit.
3. Click **Edit Selected Dataset**. The dialog for the dataset opens.



4. Make changes to the dataset and click **OK**.
5. Save the data model.
6. Test your edited data model and add new sample data.

## Include User Information Stored in System Variables in Your Report Data

Your report data model can include information about the current user that's stored in system variables.

The user information is stored in system variables as described below.

System Variable	Description
xdo_user_name	User ID of the user submitting the report. For example: Administrator
xdo_user_roles	Roles assigned to the user submitting the report. For example: XMLP_ADMIN, XMLP_SCHEDULER
xdo_user_report_oracle_lang	Report language from the user's account preferences. For example: ZHS
xdo_user_report_locale	Report locale from the user's account preferences. For example: en-US
xdo_user_ui_oracle_lang	User interface language from the user's account preferences. For example: US
xdo_user_ui_locale	User interface locale from the user's account preferences. For example: en-US

Publisher populates the system variables in an online report. In a scheduled job, Publisher doesn't populate the XDO\_USER\_REPORT\_LOCALE, XDO\_USER\_UI\_LOCALE, XDO\_USER\_UI\_ORACLE\_LANG, XDO\_USER\_REPORT\_ORACLE\_LANG, and XDO\_USER\_REPORT\_LOCALE system variables.

## Add the User System Variables as Elements

To add the user information to the data model, you can define the variables as parameters and then define the parameter value as an element in your data model.

You can also simply add the variables as parameters then reference the parameter values in your report.

The following query:

```
select
:xdo_user_name as USER_ID,
:xdo_user_roles as USER_ROLES,
:xdo_user_report_oracle_lang as REPORT_LANGUAGE,
:xdo_user_report_locale as REPORT_LOCALE,
:xdo_user_ui_oracle_lang as UI_LANGUAGE,
:xdo_user_ui_locale as UI_LOCALE
from dual
```

returns the following results:

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- Generated by Publisher -->
<DATA_DS>
<G_1>
```



```

<USER_ROLES>XMLP_TEMPLATE_DESIGNER, XMLP_DEVELOPER, XMLP_ANALYZER_EXCEL,
XMLP_ADMIN, XMLP_ANALYZER_ONLINE, XMLP_SCHEDULER </USER_ROLES>
<REPORT_LANGUAGE>US</REPORT_LANGUAGE>
<REPORT_LOCALE>en_US</REPORT_LOCALE>
<UI_LANGUAGE>US</UI_LANGUAGE>
<UI_LOCALE>en_US</UI_LOCALE>
<USER_ID>administrator</USER_ID>
</G_1>
</DATA_DS>

```

## Sample Use Case: Limit the Returned Dataset by User ID

The following example limits the data returned by the user ID.

```

select EMPLOYEES.LAST_NAME as LAST_NAME,
       EMPLOYEES.PHONE_NUMBER as PHONE_NUMBER,
       EMPLOYEES.HIRE_DATE as HIRE_DATE,
       :xdo_user_name as USERID
from   HR.EMPLOYEES EMPLOYEES
where  lower(EMPLOYEES.LAST_NAME) = :xdo_user_name

```

Notice the use of the lower() function, the xdo\_user\_name is always be in lowercase format. Publisher doesn't have a USERID so you must use the user name and either use it directly in the query; or alternatively you could query against a lookup table to find a user id.

## Create Bind Variables from LDAP User Attribute Values

To bind user attribute values stored in your LDAP directory to a data query you can define the attribute names to Publisher to create the bind variables required.

### Prerequisite

The attributes that can be used to create bind variables must be defined in the Security Configuration page by an administrator.

The attributes are defined in the Attribute Names for Data Query Bind Variables field of the LDAP Security Model definition. Any attribute defined for users can be used (for example: memberOf, sAMAccountName, primaryGroupID, mail).

### How Publisher Constructs the Bind Variable

You can reference the attribute names that you enter in the **Attribute Names for Data Query Bind Variables** field of the LDAP Security Model definition in the query.

The following shows how bind variables are constructed:

```
xdo_<attribute name>
```

Assume that you've entered the sample attributes: memberOf, sAMAccountName, primaryGroupID, mail. These can then be used in a query as the following bind variables:

```

xdo_memberof
xdo_SAMACCOUNTNAME

```

xdo\_primaryGroupID  
xdo\_mail

Note that the case of the attribute is ignored; however, the "xdo\_" prefix must be lowercase.

Use these in a data model as follows:

```
SELECT
:xdo_user_name AS USER_NAME,
:xdo_user_roles AS USER_ROLES,
:xdo_user_ui_oracle_lang AS USER_UI_LANG,
:xdo_user_report_oracle_lang AS USER_REPORT_LANG,
:xdo_user_ui_locale AS USER_UI_LOCALE,
:xdo_user_report_locale AS USER_REPORT_LOCALE,
:xdo_SAMACCOUNTNAME AS SAMACCOUNTNAME,
:xdo_memberof as MEMBER_OF,
:xdo_primaryGroupID as PRIMARY_GROUP_ID,
:xdo_mail as MAIL
FROM DUAL
```

The LDAP bind variables return the values stored in the LDAP directory for the user that's logged in.

# 3

## Structure Data

This topic describes techniques for structuring the data that is returned by Publisher's data engine, including grouping, linking, group filters, and group-level and global-level functions.

### Topics:

- [Work with Data Models](#)
- [Features of the Data Model Editor](#)
- [About the Interface](#)
- [Create Links Between Datasets](#)
- [Create Element-Level Links](#)
- [Create Subgroups](#)
- [Move an Element Between a Parent Group and a Child Group](#)
- [Create Group-Level Aggregate Elements](#)
- [Create Group Filters](#)
- [Perform Element-Level Functions](#)
- [Set Element Properties](#)
- [Sort Data](#)
- [Perform Group-Level Functions](#)
- [Perform Global-Level Functions](#)
- [Use the Structure View to Edit Your Data Structure](#)
- [Function Reference](#)

## Work with Data Models

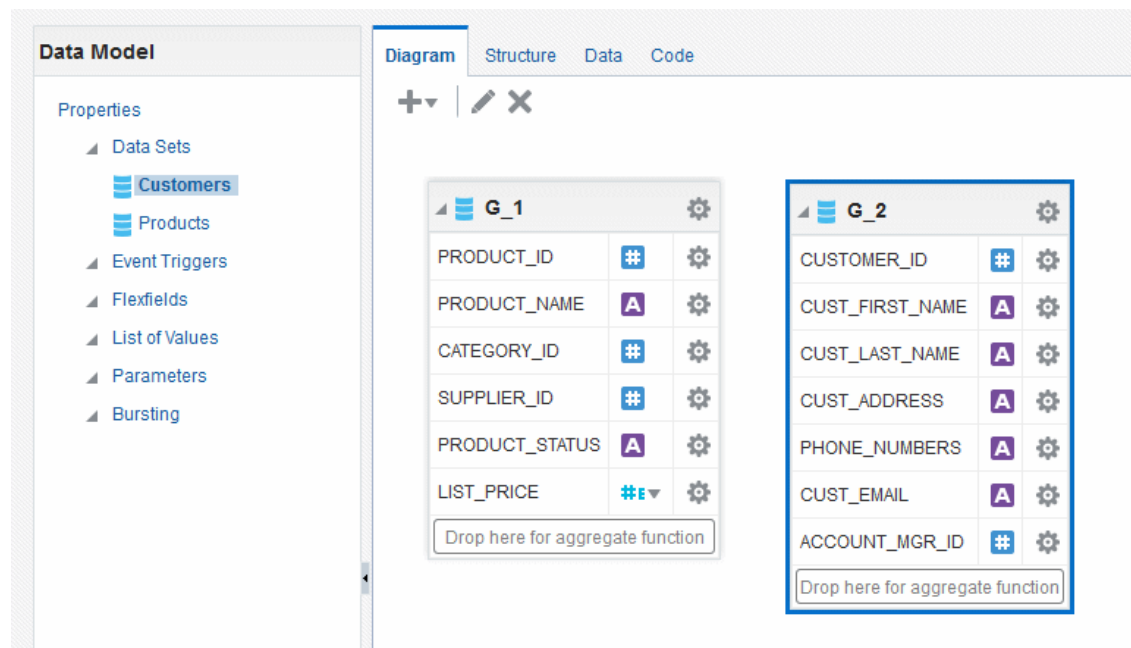
The Data Model diagram helps you to quickly and easily define datasets, break groups, and totals for a report based on multiple datasets.

- [About Multipart Unrelated Datasets](#)
- [About Multipart Related Datasets](#)
- [Guidelines for Working with Datasets](#)

## About Multipart Unrelated Datasets

If you don't link the datasets (or queries), the data engine produces a multipart unrelated query dataset.

For example, in the data model, image shown below, one query selects *products* and another selects *customers*. There's no relationship between the products and customers.



The result is shown in the data structure as depicted in the following image.

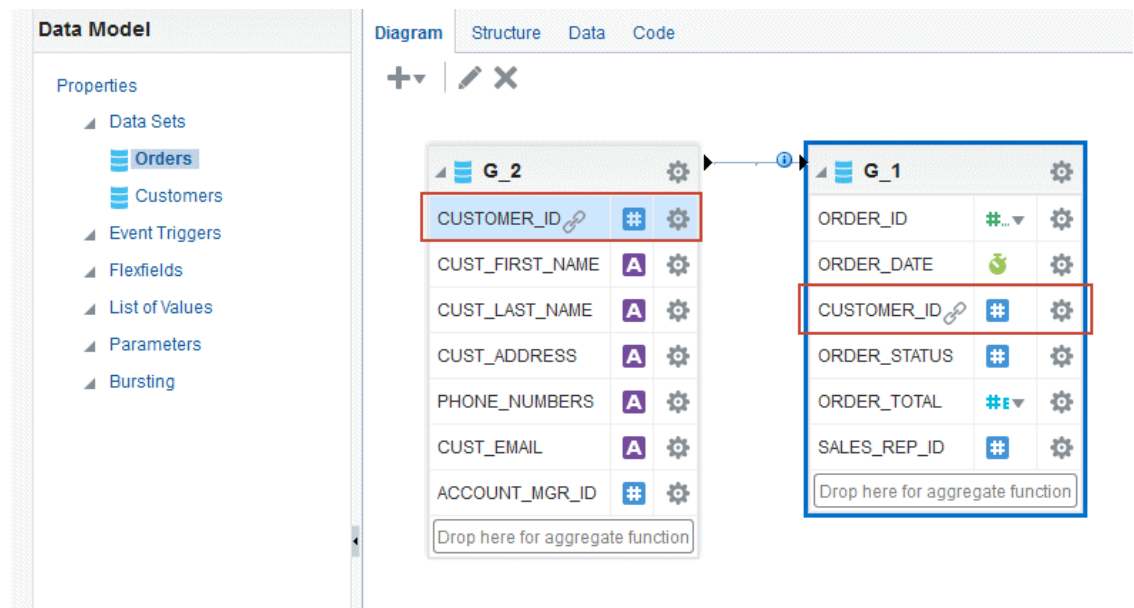
Diagram	Structure	Data	Code
Table View   <b>Output</b>			
XML output		Descriptive XML output	
▲ DATA_DS <ul style="list-style-type: none"> <li>▲ G_1               <ul style="list-style-type: none"> <li>PRODUCT_ID</li> <li>PRODUCT_NAME</li> <li>CATEGORY_ID</li> <li>SUPPLIER_ID</li> <li>PRODUCT_STATUS</li> <li>LIST_PRICE</li> </ul> </li> <li>▲ G_2               <ul style="list-style-type: none"> <li>CUSTOMER_ID</li> <li>CUST_FIRST_NAME</li> <li>CUST_LAST_NAME</li> <li>CUST_ADDRESS</li> <li>PHONE_NUMBERS</li> <li>CUST_EMAIL</li> <li>ACCOUNT_MGR_ID</li> </ul> </li> </ul>		▲ DATA_DS <ul style="list-style-type: none"> <li>▲ G_1               <ul style="list-style-type: none"> <li>PRODUCT_ID</li> <li>PRODUCT_NAME</li> <li>CATEGORY_ID</li> <li>SUPPLIER_ID</li> <li>PRODUCT_STATUS</li> <li>LIST_PRICE</li> </ul> </li> <li>▲ G_2               <ul style="list-style-type: none"> <li>CUSTOMER_ID</li> <li>CUST_FIRST_NAME</li> <li>CUST_LAST_NAME</li> <li>CUST_ADDRESS</li> <li>PHONE_NUMBERS</li> <li>CUST_EMAIL</li> <li>ACCOUNT_MGR_ID</li> </ul> </li> </ul>	

## About Multipart Related Datasets

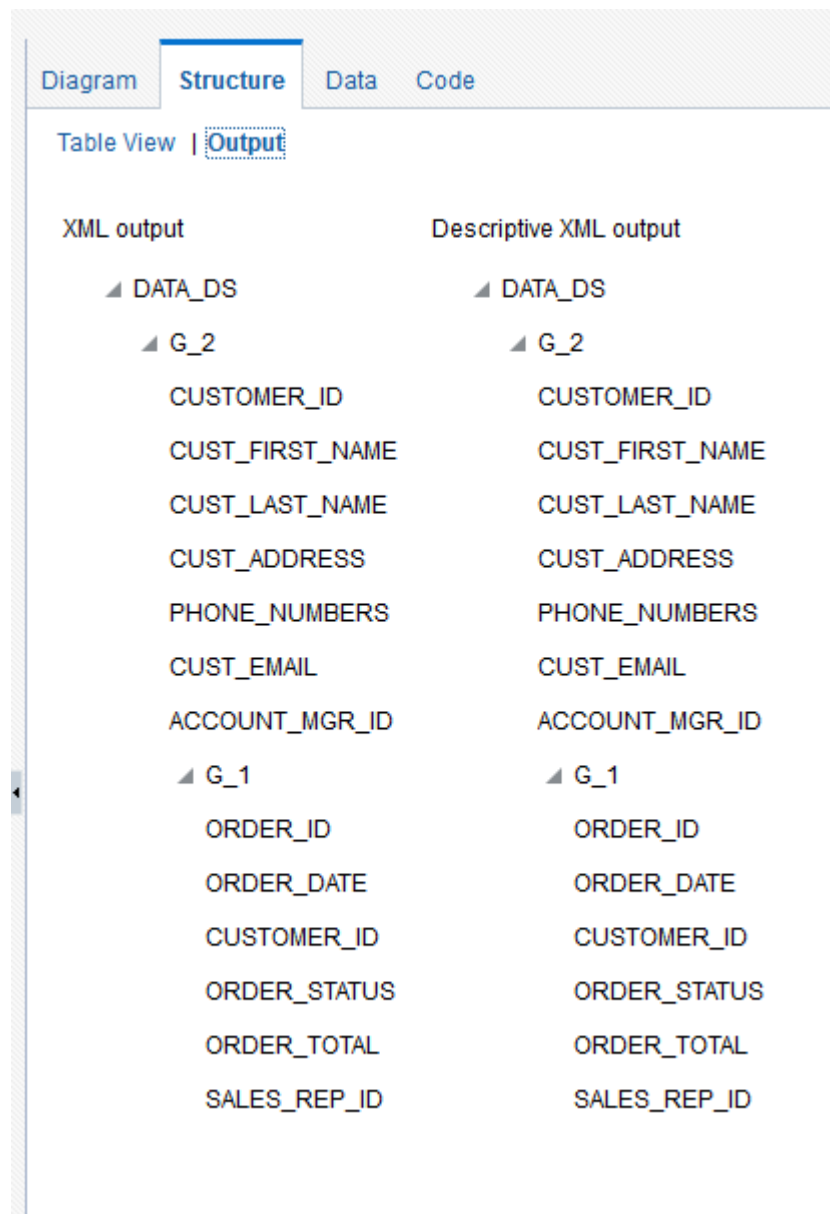
Data fetched for one part of a dataset or query can be determined by the data fetched for another part. The result is often called a *master/detail*, or *parent/child* relationship that's defined with a data link between two datasets or queries.

When you run a master/detail data model, each row of the master (or parent) query executes a query against the detail (or child) to retrieve only matching rows.

In the example, image below, two datasets are linked by the element Customer ID. The Orders dataset is a child of the Customers dataset.



The example produces the data structure shown in the following image.



## Guidelines for Working with Datasets

Certain guidelines are recommended for building data models.

- Reduce the number of datasets or queries in your data model as much as possible. In general, the fewer datasets and queries you have, the faster your data model will run. While multi-query data models are often easier to understand, single-query data models tend to execute more quickly. It's important to understand that in parent-child queries, for every parent, the child query is executed.
- You should only use multi-query data models in the following scenarios:
  - To perform functions that the query type, such as a SQL query, doesn't support directly.
  - To support complex views, for example, distributed queries or GROUP BY queries.
  - To simulate a view when you don't have or want to use a view.

## Create Links Between Datasets

Create links between datasets to combine and structure data after you extract it from the data source.

Joining and structuring data at the source into one combined dataset is sometimes not possible. For example, you can't join data at the source when data resides in disparate sources such as Microsoft SQL Server and an Oracle Database. Even if your data is coming from the same source, if you are creating large reports or documents with potentially hundreds of thousands of rows or pages, structure your data so that it matches the intended layout and optimizes document generation.

Create a link to define a master-detail or parent-child relationship between two datasets. You can create links as element-level links. Group-level links are provided for backward compatibility with data templates from earlier versions of Publisher. For the migrated datasets, delete the group links and create element links. If you create group-level links between datasets, your data can get corrupted.

A data link or parent-child relationship relates the results of multiple queries. A data link can establish these relationships:

- Between one query's column and another query's column.
- Between one query's group and another query's group, useful when you want the child query to know about its parent's data.

## About Element-Level Links

Element-level links create a bind (join) between two datasets and define a master-detail (parent-child) relationship between them.

Create element-level links, the preferred method, to define master detail relationships between datasets. When you use element-level links to link datasets, you do not need to code a join between the two datasets through a bind variable.

## Create Element-Level Links

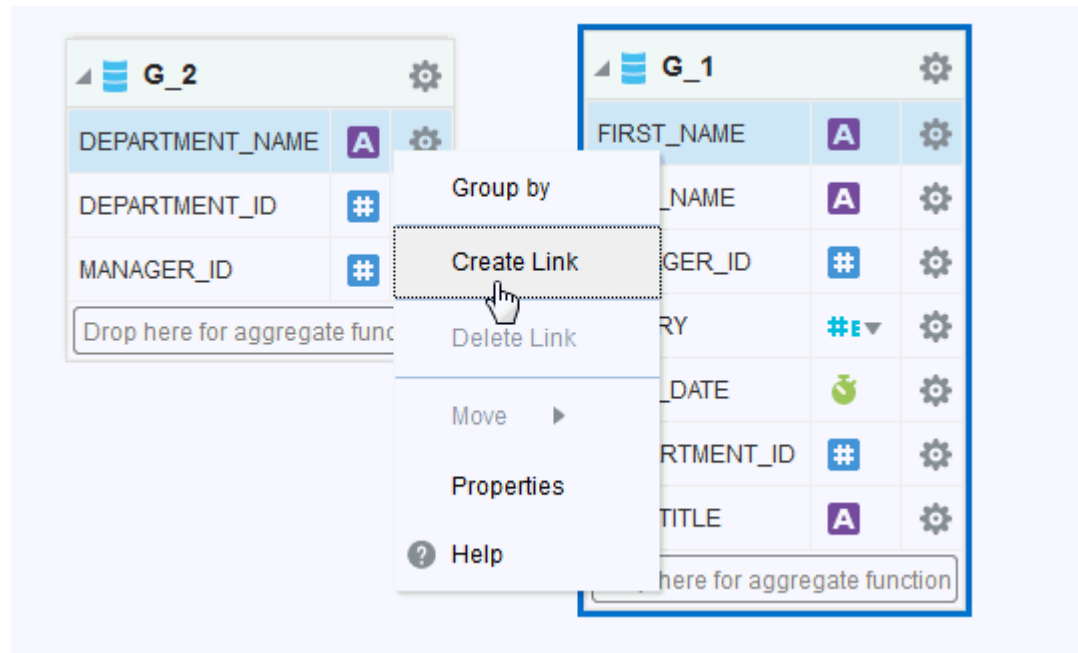
Create element-level links to define a master-detail or parent-child relationship between two datasets.

Defining an element-level link enables you to establish the binding between the elements of the master and detail datasets.

1. Open the element action menu and click **Create Link**.
2. In the Create Link dialog, choose the element, and click **OK** to create the link.

The Create Link dialog is shown below.





## Delete Element-Level Links

You can delete both group-level and element-level links between datasets.

- Do one of the following:
  - Open the element action menu for either element and click **Delete Link**
  - Select the element connector to display the linked element names and click the delete button.

## Delete Group-Level Links

You can delete both group-level and element-level links between datasets.

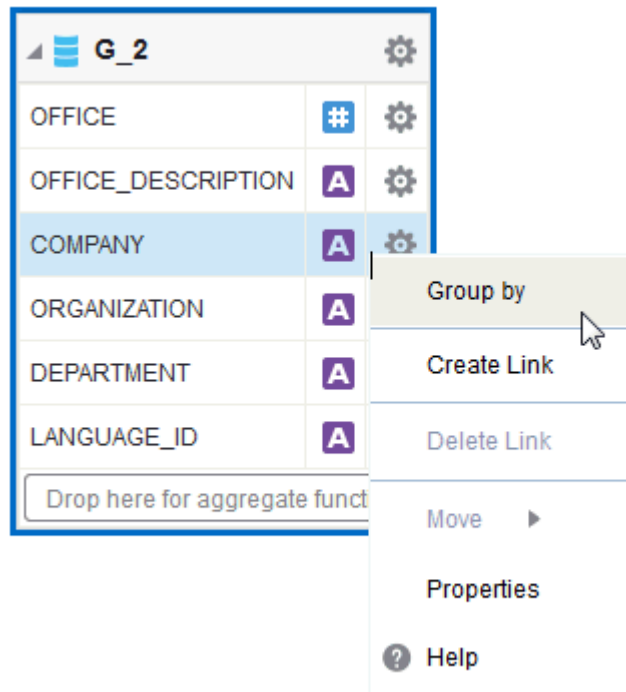
1. In the parent group, click **Menu**.
2. Click **Delete Group Link**.
3. In the **Delete Group Link** dialog, select the **Child Group** from the list and click **OK**.

## Create Subgroups

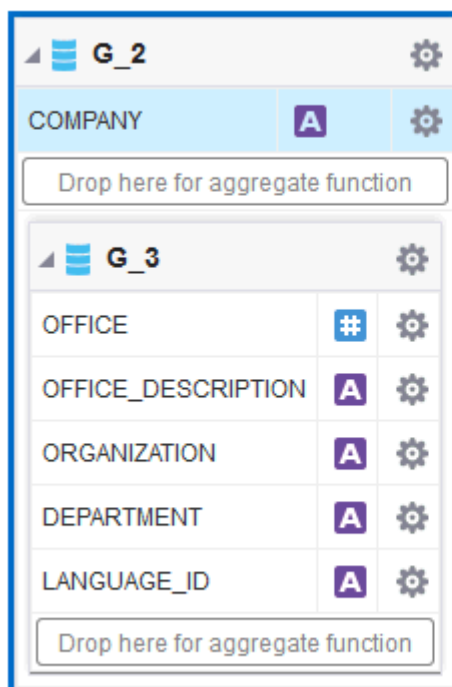
In addition to creating parent-child structures by linking two datasets, you can also group elements in the same dataset by other elements.

Creating subgroups might be helpful if your query returns data that has header data repeated for each detail row. By creating a subgroup you can shape the XML data for better, more efficient document generation.

1. Select the element to group with the other elements in the dataset.
2. Click the element action menu icon to open the menu and select **Group by** as shown.



This creates a new group within the displayed dataset. The following figure shows the G\_2 dataset grouped by the element COMPANY. This creates a new group called G\_3 that contains the other five elements in the dataset. The following figure shows how the grouped dataset is displayed in the Diagram View along with the structure.



XML output

```

└─ DATA_DS
  └─ G_2
    └─ COMPANY
      └─ G_3
        └─ OFFICE
          └─ OFFICE_DESCRIPTION
            └─ ORGANIZATION
              └─ DEPARTMENT
                └─ LANGUAGE_ID

```

You can perform any of the group actions on the group you've created.

3. To ungroup, click **Menu** on the group's title bar, and then click **Ungroup**.

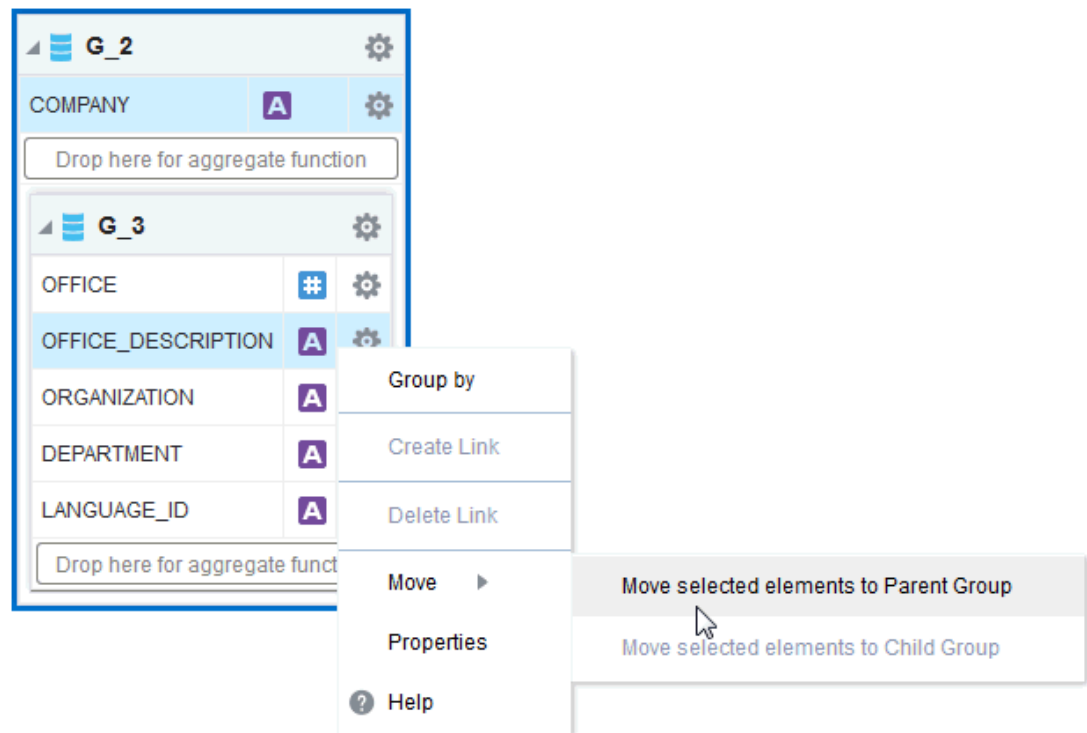
## Move an Element Between a Parent Group and a Child Group

Once you've created a group within your dataset, two new options display on the element action menu that enable you to move elements between the parent and child groups.

For the element that you want to move, click the element action icon to open the menu. If the element is in the parent group and you want to move it to the child group, select **Move selected elements to Child Group**.

If the element is in the child group and you want to move it to the parent group, select **Move selected elements to Parent Group**. In the figure below, the element action menu for OFFICE\_DSC displays the option to move the element to the parent group.

Before moving an element be aware of any dependencies on other elements.



## Create Group-Level Aggregate Elements

You can use the data model editor to aggregate data at the group or report level.

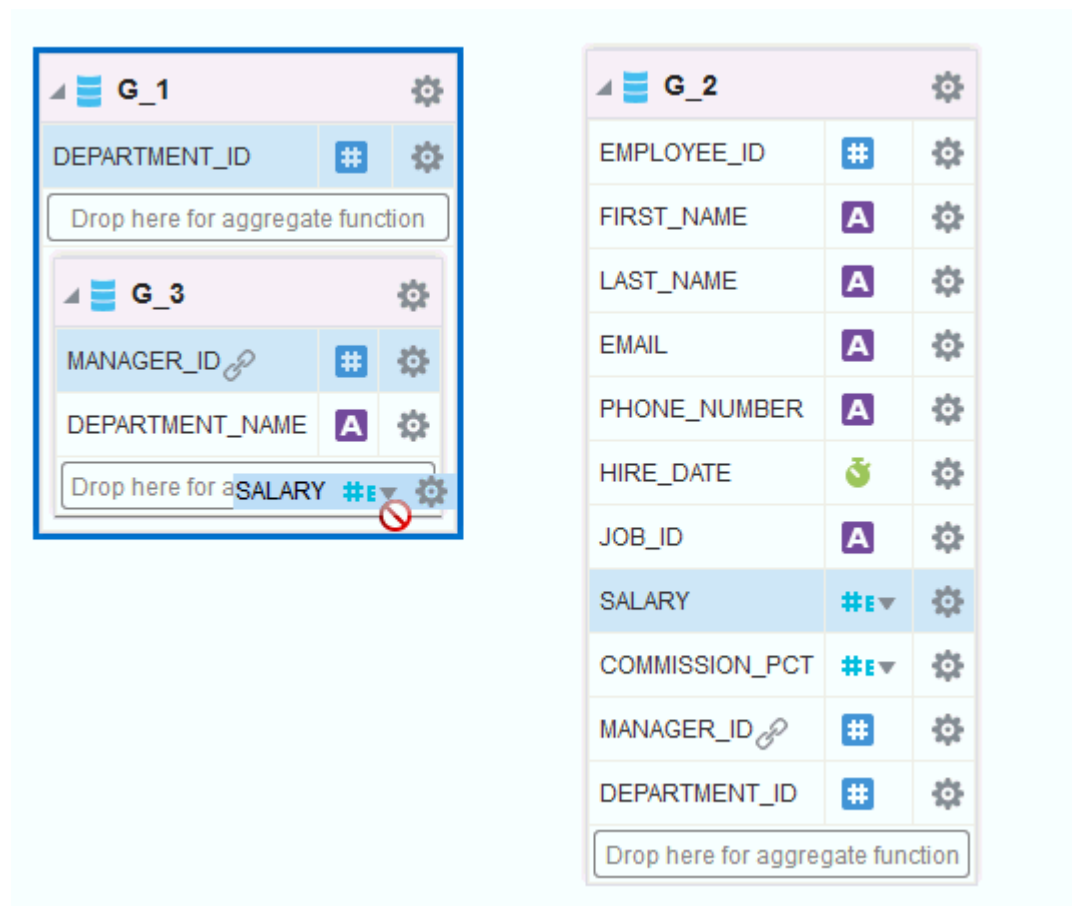
For example, if you group sales data by Customer Name, you can aggregate sales to get a subtotal for each customer's sales. You can only aggregate data at the parent level for a child element.

The aggregate functions are:

- **Average** - Calculates the average of all the occurrences of an element.

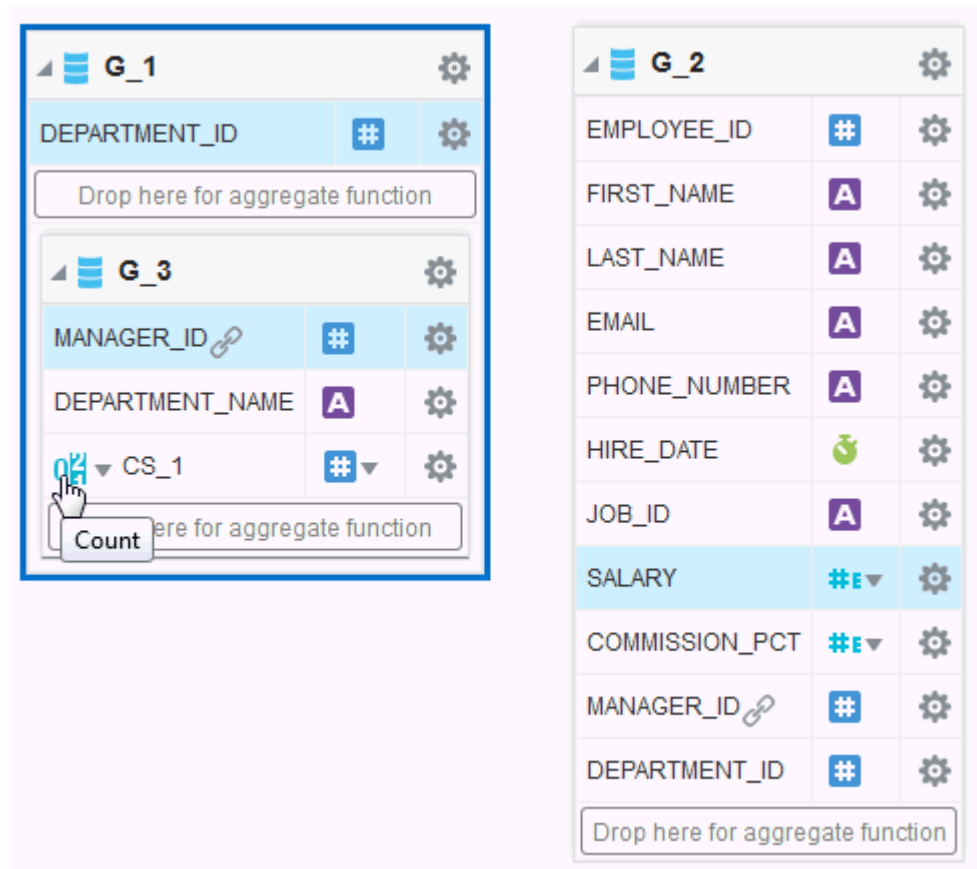
- **Count** - Counts the number of occurrences of an element.
  - **First** - Displays the value of the first occurrence of an element in the group.
  - **Last** - Displays the value of the last occurrence of an element in the group.
  - **Maximum** - Displays the highest value of all occurrences of an element in the group.
  - **Minimum** - Displays the lowest value of all occurrences of an element in a group.
  - **Summary** - Sums the value of all occurrences of an element in the group.
1. Drag the element to the **Drop here for aggregate function** field in the parent group.

The figure below shows creating a group-level aggregate function in the G\_DEPT based on the SALARY element.

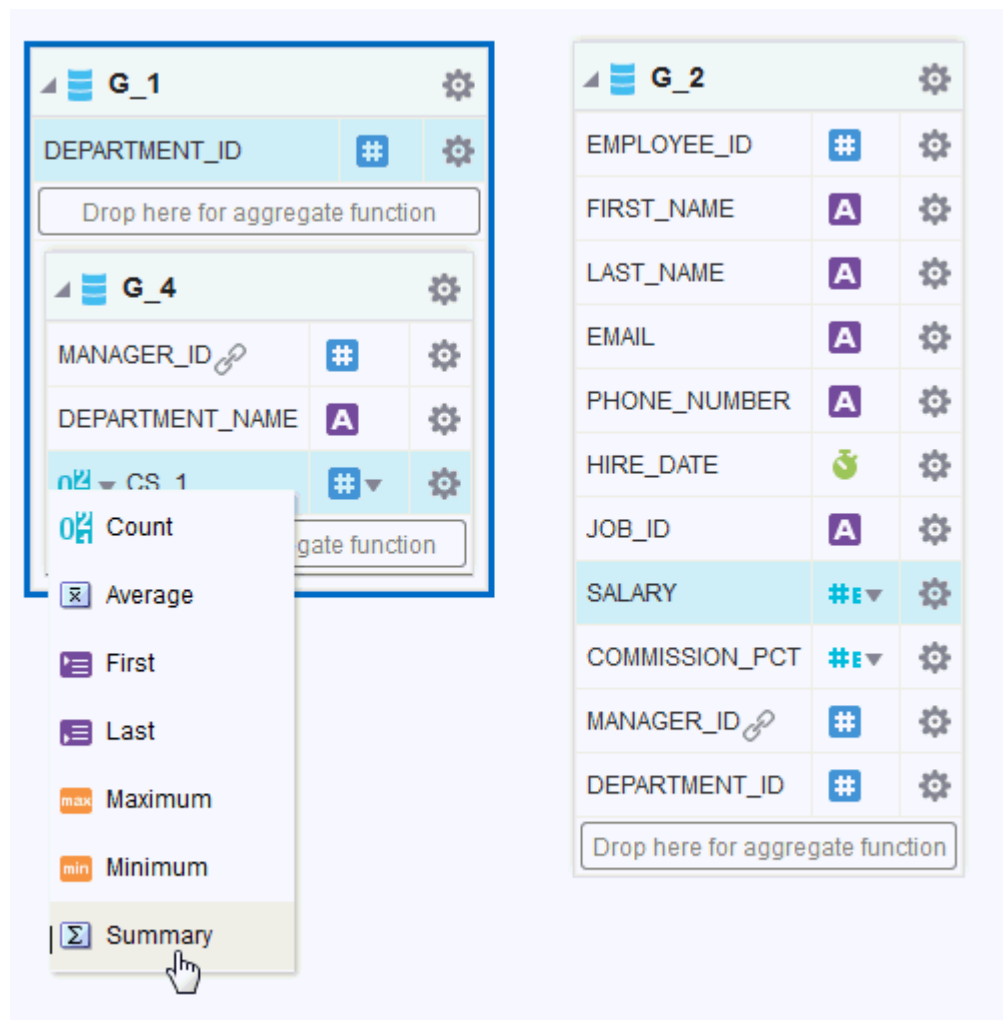


Once you drop the element, a new element is created in the parent group. By default, the Count function is applied. The icon next to the name of the new aggregate element indicates the function. Pause your cursor over the icon to display the function.

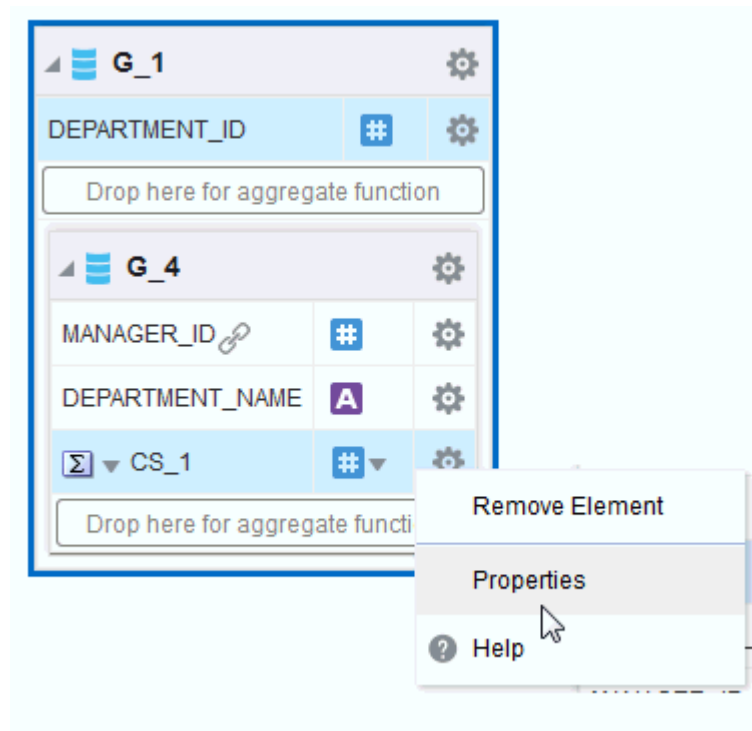
The figure below shows the new aggregate element, CS\_1, with the default Count function defined.



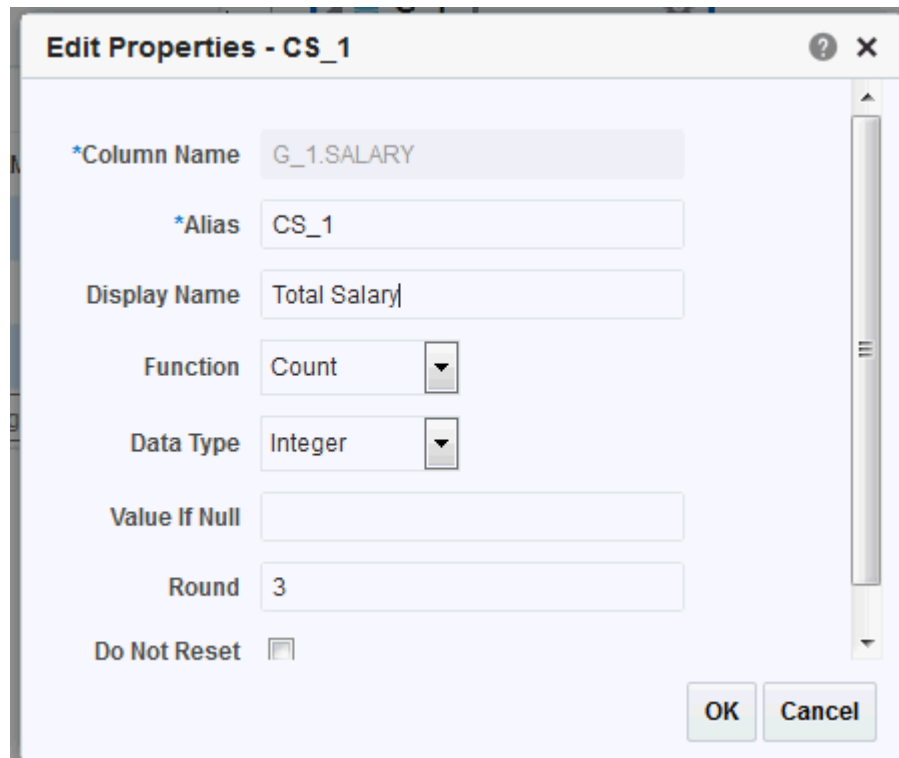
2. To change the function, click the function icon to view a list of available functions and choose from the list, as shown below.



3. To rename the element or update other properties, click the element's **Action** menu icon. Check if the element has a dependency on other elements, before renaming it.



On the menu, click **Properties**. The Properties dialog is shown below.



4. On the Edit Properties dialog, set the properties as needed.
  - **Column Name** - The internal name assigned to the element by the Publisher data model editor. This name cannot be updated.

- **Alias (XML Tag Name)** - Publisher assigns a default tag name for the element in the XML data file. You can update this tag name to assign a more user-friendly name within the data file.
- **Display Name** - The Display Name appears in the report design tools. Update this name to be meaningful to your business users.
- **Function** - If you haven't already selected the desired function, then you can select it from the list here.
- **Data Type** - Publisher assigns a default data type of Integer or Double depending on the function. Some functions also provide the option of Float.
- **Value if Null** - If the value returned from the function is null, you can supply a default value here to prevent having a null in your data.
- **Round** - By default, the value is rounded to the nearest third decimal. You can change the round value, if needed.
- **Do Not Reset** - By default, the function resets at the group level. For example, if your dataset is grouped by DEPARTMENT\_ID, and you've defined a sum function for SALARY, then the sum is reset for each group of DEPARTMENT\_ID data, giving you the sum of SALARY for that department only. If instead you want the function to reset only at the global level, and not at the group level, select **Do Not Reset**. This creates a running total of SALARY for all departments. This property is for group level functions only.

## Create Group Filters

Create group filters to conditionally remove records selected by your queries.

Group filters work for columns within the dataset group elements. Group filters might not work for expression elements and elements from other dataset groups.

Groups can have two types of filters:

- Expression — Create an expression using predefined functions and operators
- PL/SQL Function — Create a custom filter

After you add a group filter, the dataset object displays the filter indicator.

To create group filters:

1. Click **Menu**, and then select **Create Group Filter**.
2. Select the Group Filter Type: **Expression** or **PL/SQL**. For PL/SQL filters, ensure that you specify the PL/SQL Package as the **Oracle DB Default Package** in the data model properties.
3. Enter the Filter:
  - To enter an expression, select the elements and move the elements to the Group Filter definition box. Click the predefined functions and operators to insert them in the Group Filter box.  
Click **Validate Expression** to ensure that the entry is valid.
  - To enter a PL/SQL function, select the PL/SQL package from the Available box and move the function to the Group Filter box.  
Your PL/SQL function in the default package must return a Boolean type.



## Perform Element-Level Functions

You can perform various functions at the element level.

- Group by an element to create a subgroup, as described in [Create Subgroups](#)
- Create element-level links between datasets, as described in [Create Element-Level Links](#)
- Set element properties, as described in [Set Element Properties](#)

## Set Element Properties

You can set properties for individual elements.

Note that these properties are also editable from the Structure View. If you need to update multiple element properties, it may be more efficient to use the Structure View.

To set element-level properties using the element dialog:

1. Click the element's action menu icon. From the menu, select **Properties**.
2. Set the properties as needed.
  - **Alias** - Publisher assigns a default tag name to the element in the XML data file. You can update this tag name to assign a more user-friendly name within the data file.
  - **Display Name** - The Display Name appears in the report design tools and the column name in reports. Update this name to be meaningful to your business users.
  - **Data Type** - Publisher assigns a default data type. Valid values are String, Date, Integer, Double, Float.
  - **Sort Order** - You can sort XML data in a group by one or more elements. For example, if in a dataset employees are grouped by department and manager, you can sort the XML data by department. Within each department you can group and sort data by manager, and within each manager subgroup, employees can be sorted by salary. If the element isn't in a parent group, the **Sort Order** property isn't available.
  - **Value if Null** - If the value of an occurrence of the element is null, you can supply a default value here to prevent having a null in your data.

## Sort Data

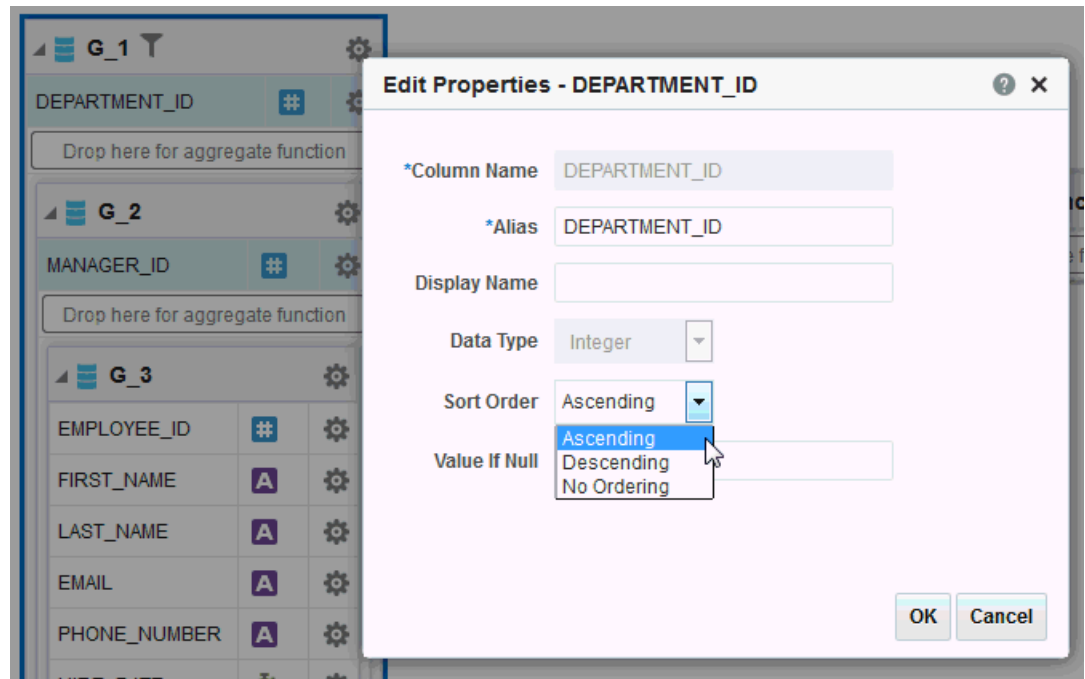
Sorting is supported for parent group break columns only.

For example, if a dataset of employees is grouped by department and manager, you can sort the XML data by department. Within each department you can group and sort data by manager. If you know how the data should be sorted in the final report, you specify sorting at data generation time to optimize document generation.

To apply a sort order to a group:

1. Click the action menu icon of the element you want to sort by. From the menu, select **Properties**.
2. Select the **Sort Order**.

The figure below shows the Properties dialog for the DEPARTMENT\_ID element with the Sort Order list displayed.



## Perform Group-Level Functions

This section describes how to perform group-functions.

Topics include:

- [The Group Action Menu](#)
- [Edit the Dataset](#)
- [Remove Elements from the Group](#)
- [Edit the Group Properties](#)

### The Group Action Menu

The **Menu** button is available at the group level and enables to perform various functions.

- Create, edit, and delete group filters, as described in [Create Group Filters](#).
- Add an element to the group based on an expression, as described in [Add a Group-Level or Global-Level Element by Expression](#).
- Edit the dataset, as described in [Edit the Dataset](#).
- Remove elements from the group, as described in [Remove Elements from the Group](#).
- Edit group properties, as described in [Edit the Group Properties](#).

### Edit the Dataset

Launch the dataset editor to modify properties of selected datasets.

To edit the dataset at group-level:

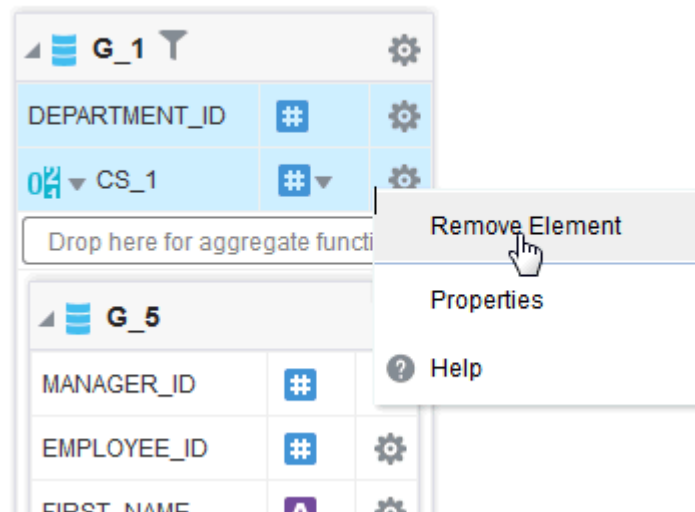
1. Click the group-level menu.
2. Select **Edit Dataset** to launch the dataset editor.

## Remove Elements from the Group

You can remove elements from groups as needed.

To remove an element from the group:

- On the element row, click the menu and then click **Remove Element**. An example is shown below. You can only remove elements added as a group function (sum, count, and so on) or added as an expression.



## Edit the Group Properties

Edit the properties of a group as needed.

- Click **Menu** and select **Properties**.
- Edit the **Group Name** or **Display Name** and click **OK**, as shown below.



## Perform Global-Level Functions

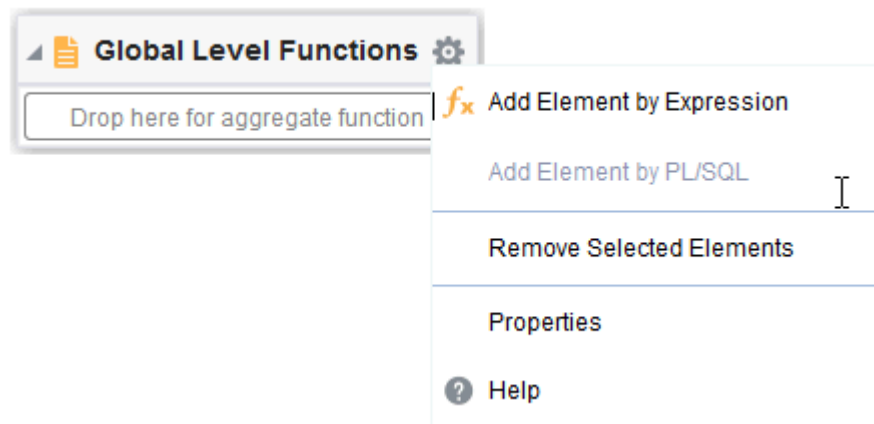
The global-level functions enable you to add elements to your report dataset at the top report level.

You can add the following types of elements as top-level data:

- Elements based on aggregate functions
- Elements based on expressions
- Elements based on PL/SQL statements (for Oracle Database data sources)

Make sure you order the global-level functions correctly. The global-level functions execute sequentially.

If you select a data type of Integer for any calculated element and the expression returns a fraction, the data isn't truncated. The **Global Level Functions** object is shown below. To add elements based on aggregate functions, drag the element to the "Drop here for aggregate function" space of the object. To add an element based on an expression or PL/SQL, click **Menu**, and choose the appropriate action.



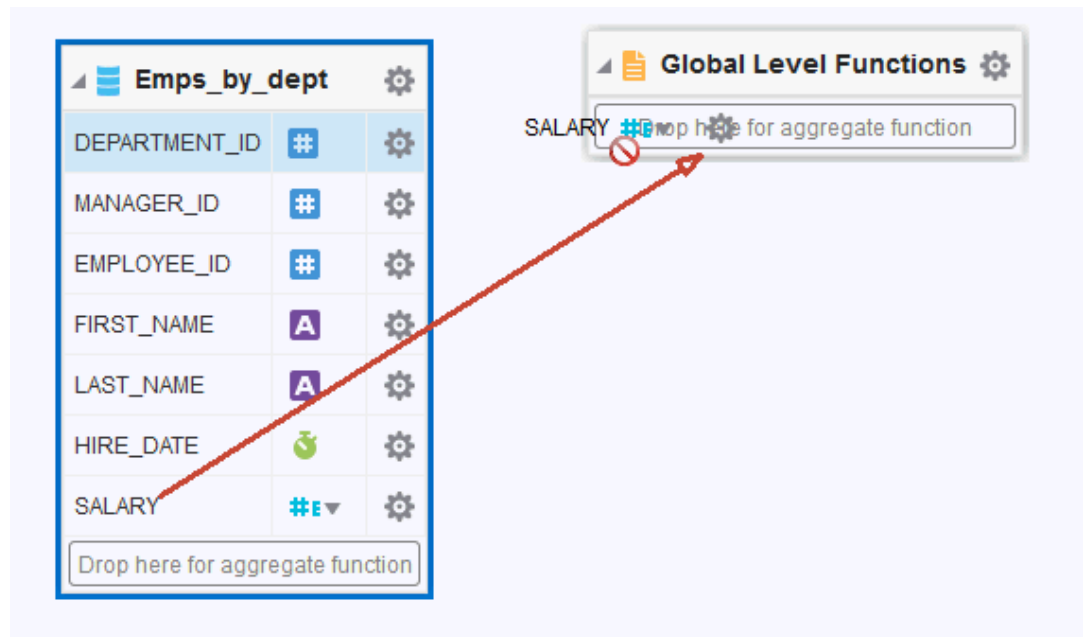
### Add a Global-Level Aggregate Function

You can add global-level aggregate functions based on selected elements.

Available functions are as follows:

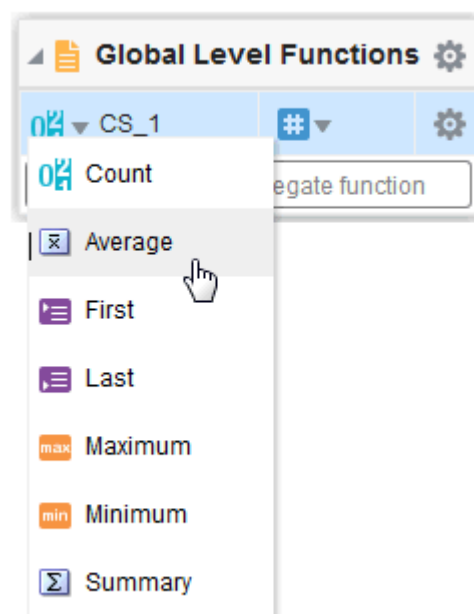
- Count
  - Average
  - First
  - Last
  - Maximum
  - Minimum
  - Summary
1. Drag and drop the data element from the dataset to the **Drop here for aggregate function** area of the Global Level Functions object.

For example, the image below shows creating a global level aggregate function based on the Salary element.



2. When you release the mouse, the data model editor assigns a default name to the aggregate element and assigns Count as the default function.

The figure below shows the function for the new global level element CS\_1 being modified from Count to Average.



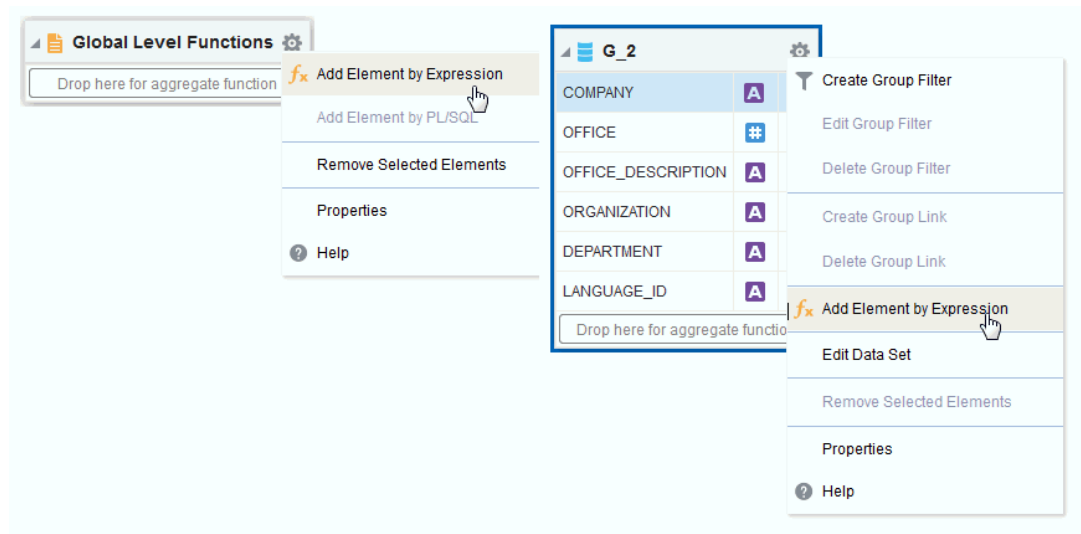
3. Click the function icon to the left of the new element name and choose the function from the list.

- To change the default name, click the actions icon to the right of the element name and click **Properties** to launch the **Edit Properties** dialog.

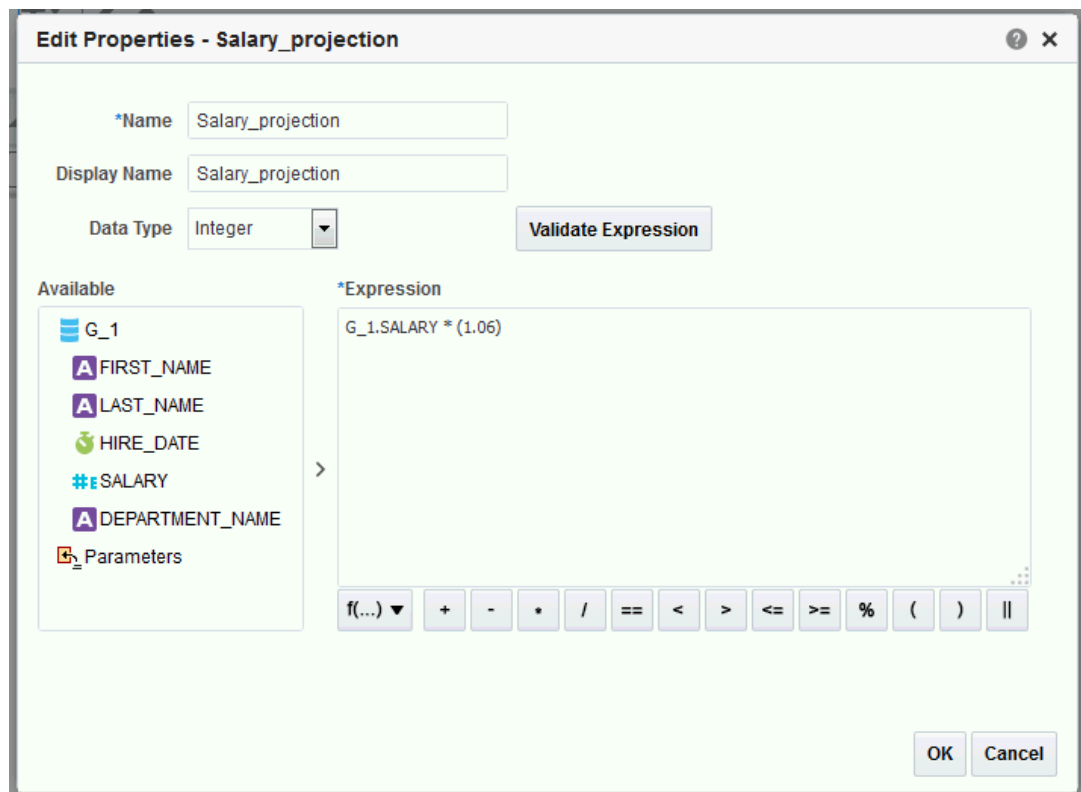
## Add a Group-Level or Global-Level Element by Expression

You can add group-level or global-level aggregate functions by expressions.

- To add a group-level element, on the **Group** object, click **Menu** and select **Add Element by Expression**.



- In the **Add Element by Expression** dialog, enter fields and operators.

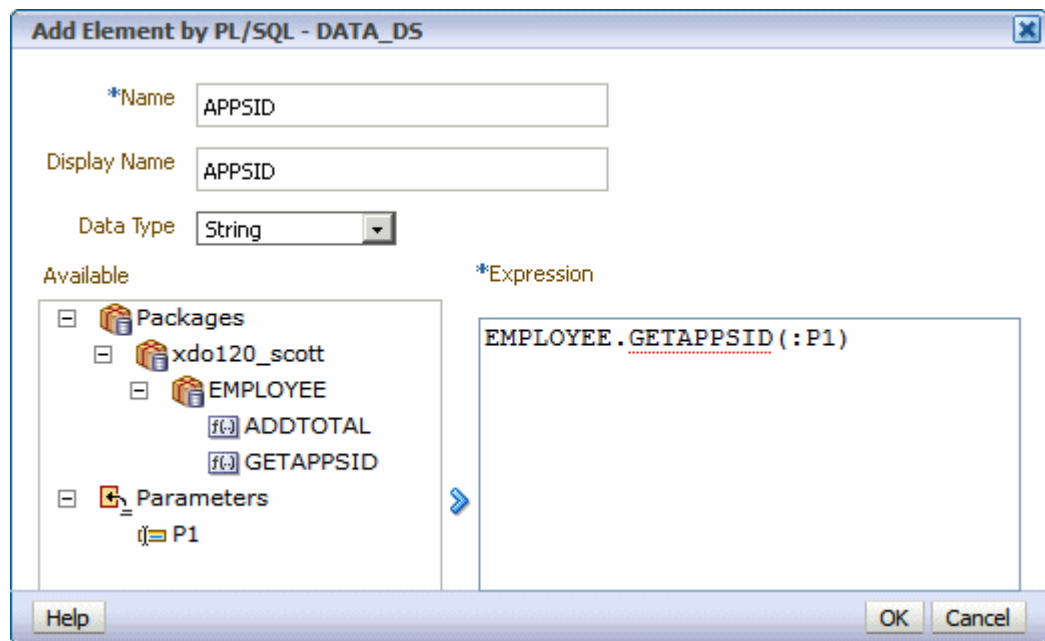


3. In the **Display Name** field, enter a name that is meaningful to your business users.
4. Optional: Select a data type.
5. Use the shuttle arrow to move the data elements required for the expression from the **Available** box to the **Expression** box.
6. Click an operator to insert it in the **Expression** box, or choose from the function list.
7. Click **Validate Expression** to validate the expression.

## Add a Global-Level Element by PL/SQL

The PL/SQL function must return a VARCHAR data type.

1. On the Properties page, specify the PL/SQL Package as the **Oracle DB Default Package** in the data model properties. .
2. On the **Global Level Functions** object, click **Menu**, and then click **Add Element by PL/SQL**.
3. In the **Add Element by PL/SQL** dialog, enter the following fields:
  - **Name** - Enter a meaningful name for the element.
  - **Display Name** - Enter a display name. This appears in the report design tools. Enter a name that is meaningful to your business users.
  - **Data Type** - Select **String**.



4. Select the PL/SQL package from the Available box and click the shuttle button to move the function to the Group Filter box.

## Use the Structure View to Edit Your Data Structure

The Structure view enables you to preview the structure of your data model.

The Data Source column displays the data elements in a hierarchical tree that you can collapse and expand. Use this view to verify the accuracy of the data model structure and to perform the following edits:

- [Rename Elements](#)
- [Add Value for Null Elements](#)

The Structure view is shown below.

Diagram <b>Structure</b> Data Code						
Table View   Output						
Data Source	XML View			Business View		
	XML Tag Name	Sorting	Value If Null	Display Name	Data Type	
Report Data						
Data Structure	DATA_DS					
Employees	G_1					
A DEPARTMENT_NAME	DEPARTMENT_NAME			DEPARTMENT_NAME	A	
fx Salary_projection	Salary_projection			Salary_projection	#	
Departments	G_2					
A DEPARTMENT_NAME	DEPARTMENT_NAME			DEPARTMENT_NAME	A	
# MANAGER_ID	MANAGER_ID			MANAGER_ID	#	
A FIRST_NAME	FIRST_NAME			FIRST_NAME	A	
A LAST_NAME	LAST_NAME			LAST_NAME	A	
A PHONE_NUMBER	PHONE_NUMBER			PHONE_NUMBER	A	

## Rename Elements

Use the Structure page to define user-friendly names for elements in the data model.

You can rename both the XML element tag name (XML View) and the name that displays in the report layout tools (Business View). The figure below shows renaming the Data Source elements to friendlier Business View names.



Diagram **Structure** Data Code

Table View | Output

Data Source	XML View			Business View	
	XML Tag Name	Sorting	Value If Null	Display Name	Data Type
Report Data					
Data Structure	DATA_DS				
Employees	G_1				
DEPARTMENT_NAME	DEPARTMENT_NAME			Department	A
Salary_projection	Salary_projection			Salary Projection	#
Departments	G_2				
DEPARTMENT_NAME	DEPARTMENT_NAME			Department	A
MANAGER_ID	MANAGER_ID			Manager	#
FIRST_NAME	FIRST_NAME			First	A
LAST_NAME	LAST_NAME			Last	A
PHONE_NUMBER	PHONE_NUMBER			Phone	A

## Add Value for Null Elements

The Structure also enables you to enter a value to use for an element if the data model returns a null value for the element.

1. Click the **Structure** tab.
2. Enter the value to use in the **Value if Null** field for the element.

## Function Reference

The table below describes the usage of supported functions available from the Add Element by Expression dialog and the Edit Group Filter dialog.

Function	Description	Syntax	Example
IF	Logical IF operator Evaluates boolean_expr, and returns true_return if boolean_expr is true, and false_return if boolean_expr is false.	IF (boolean_expr, true_return, false_return)	IF (G_1.DEPARTMENT_ID == 10, 'PASSED', 'FAIL')returns 'PASSED' if DEPARTMENT_ID = 10, otherwise returns 'FAIL'
NOT	Logical NOT operator Evaluates boolean_expr, and returns true if boolean_expr is false.	STRING(NOT(boolean_expr))	STRING(NOT(G_1.JOB_ID == 'MANAGER'))returns 'TRUE' if JOB_ID = MANAGER, otherwise returns 'FALSE'

Function	Description	Syntax	Example
AND	Logical AND operator Evaluates boolean_expr1 and boolean_expr2, and returns true if both Boolean expressions are true, otherwise returns false.	STRING(AND(boolean_expr1, boolean_expr2, ...))	STRING(AND (G_1.JOB_ID == 'MANAGER', G_1.DEPARTMENT_ID == 10))returns 'TRUE' if both JOB_ID = MANAGER and DEPARTMENT_ID = 10, otherwise returns 'FALSE'
&&	Logical AND operator Evaluates boolean_expr1 and boolean_expr2, and returns true if both Boolean expressions are true, otherwise returns false.	STRING(boolean_expr1 && boolean_expr2)	STRING(G_1.JOB_ID == 'MANAGER' && G_1.DEPARTMENT_ID == 10)  returns 'TRUE' if both JOB_ID = MANAGER and DEPARTMENT_ID = 10, otherwise returns 'FALSE'
	Logical OR operator Evaluates boolean_expr1 and boolean_expr2 and returns true if either or both the Boolean expressions is true, otherwise returns false.	STRING(OR(boolean_expr1, boolean_expr2))	STRING(OR (G_1.JOB_ID == 'MANAGER', G_1.DEPARTMENT_ID == 10))  returns 'TRUE' if either JOB_ID = MANAGER or DEPARTMENT_ID = 10, otherwise returns 'FALSE'
MAX	Returns the maximum value of the element in the set.	MAX(expr1, expr2, expr3, ...)	MAX(G1_Salary, 10000) returns max of salary or 10000
MIN	Returns the minimum value of the element in the set.	MIN(expr1, expr2, expr3, ...)	MIN(G1_Salary, 5000) returns min of salary or 5000
ROUND	Returns a number rounded to the integer places right of the decimal point.	ROUND(number[,integer])  If integer is omitted, number is rounded to 0 places.  Integer can be negative to round off digits left of the decimal point.  Integer must be an integer.	ROUND(2.777) returns 3 ROUND(2.777, 2) returns 2.78
FLOOR	Returns the smallest integer equal to or less than n.	FLOOR(n)	FLOOR(2.777) returns 2
CEILING	Returns the largest integer greater than or equal to n.	CEILING(n)	CEILING(2.777) returns 3
ABS	Returns the absolute value of n.	ABS(n)	ABS(-3) returns 3

Function	Description	Syntax	Example
AVG	Returns the average value of the expression.	AVG(expr1, expr2, expr3, ...)	AVG(G_1.SALARY,G_1.COMMISSION_PCT*G_1.SALARY)  returns the average of SALARY and COMMISSION  For example, if SALARY = 14000 and COMMISSION_PCT = .4, the expression evaluates to 9800.0
LENGTH	Returns the length of an array.  The LENGTH function calculates the length using characters as defined by the input character set.  If char is null, the function returns null.  If char is an array, it returns the length of the array.	LENGTH(expr)	Example to return the length of an array: LENGTH(1, 2, 4, 4)) returns 4  Example to return the length of a string: LENGTH('countries') returns 9
SUM	Returns the sum of the value of the expression.	SUM(expr1, expr2, ...)	SUM (G_1.SALARY, G_1.COMMISSION_PCT*G_1.SALARY)  returns sum of salary and commission  For example, if SALARY = 14000 and COMMISSION_PCT =.4, the expression evaluates to 19,600.0
NVL	Replaces null (returned as a blank) with a string in the results of a query.	NVL(expr1, expr2)  If expr1 is null, then NVL returns expr2.  If expr1 is not null, then NVL returns expr1.	NVL(G_1.COMMISSION_PCT, .3) returns .3 when G_1.COMMISSION_PCT is null
CONCAT	Returns char1 concatenated with char2.	CONCAT(char1, char2)	CONCAT(CONCAT(First_Name, ' '), Last_Name)  where First_Name = Joe and Last_Name = Smith returns Joe Smith
STRING	Returns char as a string data type.	STRING(expr)	STRING(G1_SALARY)  where salary = 4400 returns 4400 as a string
SUBSTRING	Extracts a substring from a string.	SUBSTRING(string, start_pos, end_pos)  string is the source string. start_pos is the position to start the extraction.  end_pos is the end position of the string to extract (optional).	SUBSTRING('this is a test', 5, 7) returns "is" (that is, characters 6 through 7) SUBSTRING('this is a test', 5) returns "is a test"

Function	Description	Syntax	Example
INSTR	Returns the position/location of the first character of a substring in a string.	INSTR(string1, string2) string1 is the string to search. string2 is the substring to search for in string1.	INSTR('this is a test', 'is a') returns 5
DATE	Converts a valid Java date string to a date data type in canonical format.	DATE(char, format_string) where (1) char is any valid Java date string (for example, 13-JAN-2013)(2) format_string is the Java date format of the input string (for example, dd-MMM-yyyy) The input and format strings must be a valid Java date format string.	DATE('01-Jan-2013','dd-MMM-yyyy') returns 2013-01-01T08:00:00.000+00:00
FORMAT_DATE	Converts a date argument in the Java date format to a formatted string.	FORMAT_DATE(date,format_string)	FORMAT_DATE(SYSDATE,'dd-MMM-yyyy') where the value of SYSDATE = 2013-01-24T16:32:45.000-08:00returns 24-Jan-2013
FORMAT_NUMBER	Converts a number or numeric string to a string in the specified number format.	FORMAT_NUMBER(number,format_string)	FORMAT_NUMBER(SOME_NUMBER, '\$9,999.00') where the value of SOME_NUMBER = 12345.678returns \$12,345.68
DECODE	Replaces the value of an expression with another value based on the specified search and replace criteria.	DECODE(expr, search, result [, search, result]...[, default])	DECODE(PROD_FAMILY_CODE,100,'Colas',200,'Root Beer',300,'Cream Sodas',400,'Fruit Sodas','Other')returns(1) 'Colas' if PROD_FAMILY_CODE = 100(2) 'Root Beer' if PROD_FAMILY_CODE = 200(3) 'Cream Sodas' if PROD_FAMILY_CODE = 300(4) 'Fruit Sodas' if PROD_FAMILY_CODE = 400(5) 'Other' if PROD_FAMILY_CODE is any other value
REPLACE	Replaces a sequence of characters in a string with another set of characters.	REPLACE(expr,string1,string2) where string1 is the string to search for and string2 is the string to replace.	REPLACE(G_1.FIRST_NAME,'B','L') where G_1.FIRST_NAME = Barry returns Larry

# 4

## Add Parameters and Lists of Values

This topic describes how to add parameters and lists of values to a data model.

### Topics:

- [About Parameters](#)
- [Add a New Parameter](#)
- [About Lists of Values](#)
- [Add Lists of Values](#)
- [Add Flexfield Parameters](#)

## About Parameters

The parameters in a data model enables you to interact with data when you view reports.

Supported parameter types:

- **Text** - Enables entering a text string to pass as the parameter.
- **Menu** - Enables making selections from a list of values. A list of values can contain fixed data that you specify or a list created using a SQL query that is executed against any of the defined data sources. This option supports multiple selection, a **Select All** option, and partial page refresh for cascading parameters.

To create a menu type parameter, define the list of values, and then define the parameter and associate it to the list of values.

- **Date** - Enables you to select a date as a parameter. You must use the data type *Date* and the Java date format.
- **POV** - Enables you to use an hierarchical point of view as a parameter to select Essbase data. You can view a cube dimension, expand a data structure node, and drill down to select data from a POV. You must use an MDX query to create a list of values for a POV parameter.
- **Search** - Enables you to specify search text and to select one value from a long list of values.

You can define mandatory parameters for your report. An asterisk symbol next to a parameter label indicates that the parameter is marked as mandatory in the data model. You must provide values for the mandatory parameters of a report, if you want to run the report online or schedule the report.

After defining the parameters in the data model, you can configure how the parameters are displayed in the report. Make sure you don't use any special characters in the display name of the parameters.

You can use parameters in various ways, depending on the type of the dataset. For example, you can use all parameter features with datasets from SQL queries. With other types of datasets, you can use all, none, or a subset of the parameter features, as described in this table.

Dataset Type	Parameter Support	Multiple Selection	Can Select All	Refresh Other Parameters on Change
SQL Query	Yes Supports all parameter types	Yes	Yes	Yes
LDAP Query	Yes Supports only Text type parameter	No	No	No
MDX Query	Yes Supports Text and POV parameter types that return a text value	No	No	No
Analysis	Inherited from Analysis	Yes (using Oracle BI Dashboards)	Yes (using Oracle BI Dashboards)	Yes (using Oracle BI Dashboards)
DV Dataset	Yes Supports all parameter types	Yes	Yes	No
HTTP (XML Feed)	Yes Supports only Text and Date parameter types	No	No	No
Web Service	Yes Supports only Text and Date parameter types	No	No	No
CSV File	No	No	No	No
Microsoft Excel File	Yes Supports only Text and Date parameter types	No	No	No
XML File	No	No	No	No
Content Server	No	No	No	No

## Add a New Parameter

Create a parameter by assigning it a name and other properties.

The parameter name you choose must not exceed the maximum length allowed for an identifier by your database. Refer to your database documentation for identifier length limitations.

When you design report layouts using the Layout Editor, the preview of the report output uses the default values of the parameters.

You can configure row placement at the report level. The report definition supports additional display options for parameters.

To add a new parameter:

1. On the Data Model components pane, click **Parameters** and then click **Create new Parameter**.
2. Enter a **Name** for the parameter.  
The name must match any references to this parameter in the dataset.
3. Select the **Data Type** from the list. A **Date** data type only supports a **Date Parameter Type**.
4. Enter a **Default Value** for the parameter. This is recommended to prevent long running queries.
5. Select the **Parameter Type**.
6. To mark the parameter as mandatory, select **Mandatory**.  
Without providing values for the mandatory parameters, you can't test a report using the View Data option, or run the report online, or schedule the report.
7. In the **Row Placement** setting configure the number of rows for displaying the parameters and in which row to place each parameter.  
For example, if your report has six parameters, you can assign each parameter to a separate row, 1 - 6, with one being the top row; or, you can assign two parameters each to rows 1, 2, 3. By default, all parameters are assigned to row 1.

## Create a Text Parameter

The **Text** type parameter provides a text box to prompt the user to enter a text entry to pass as the parameter to the data source.

To create a text parameter:

1. Select **Text** from the Parameter Type list.
2. Enter the **Display Label**. For example, Department.
3. Enter the **Text Field Size** as an integer. This field determines the size (width) of the field, but doesn't limit the number of characters that the user can enter into the text box.
4. Enable the following **Options** if required:
  - **Text field contains comma-separated values** - Enables the user to enter multiple comma-delimited values for this parameter. The parameter in your data source must be defined to support multiple values.
  - **Refresh other parameters on change** - Performs a partial page refresh to refresh any other parameters whose values are dependent on the value of this one.

## Create a Menu Parameter

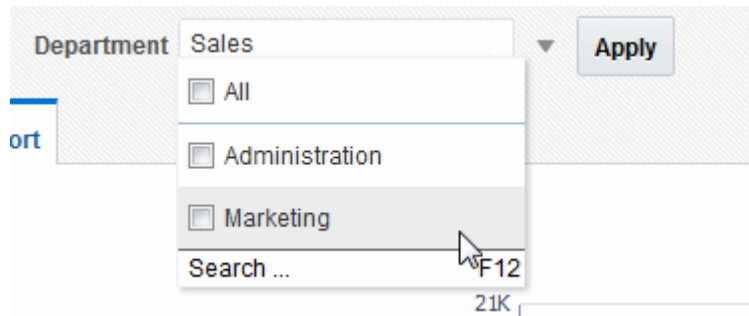
A Menu type parameter presents a list of values to the user.

You must define the list of values first. The Menu type parameter supports the data types of String and Integer only. If the number of values in the list exceeds 999, then use a Search parameter instead of a Menu type parameter.

To create a menu parameter:

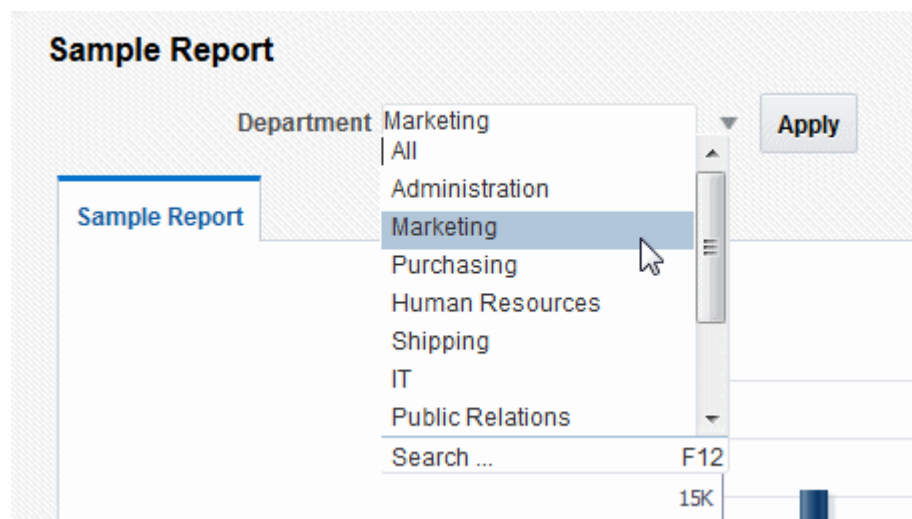
1. Select **Menu** from the **Parameter Type** list. The lower pane displays the appropriate fields.

2. In **Data Type**, select *String* or *Integer*.
3. Enter the **Display Label**. The display label is the label that displays to users when they view the report. For example: Department.
4. Select the **List of Values** that you defined for this parameter.
5. Enter the **Number of Values to Display in List**. If the number of values in the list exceeds the entry in this field, the user must click **Search** to find a value not displayed, as shown in the figure below. This field defaults to 100.



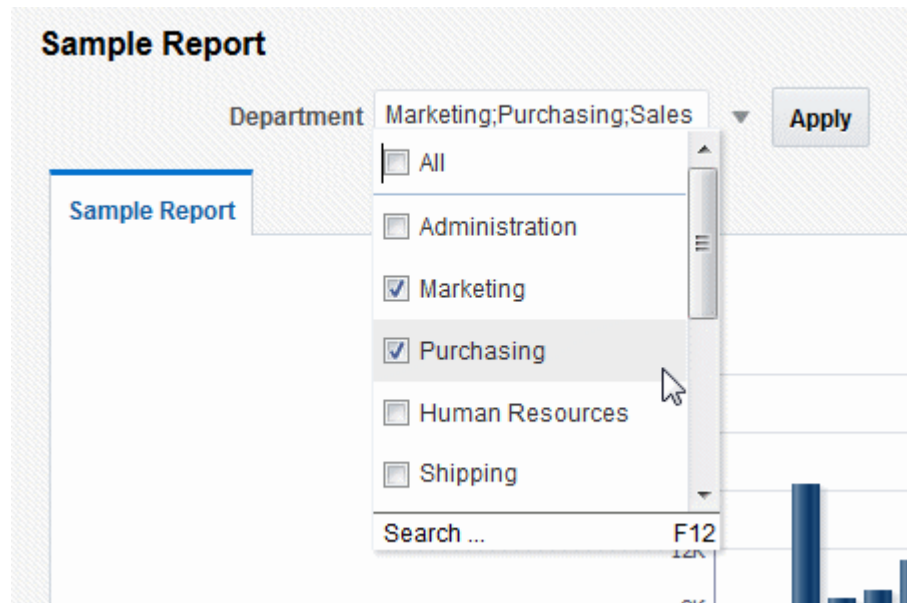
6. Enable the following **Options** if required:
  - **Multiple Selection** - Allows the user to select multiple entries from the list. Your data source must be able to support multiple values for the parameter. The display of a menu parameter that supports multiple selection differs. See the two figures below.
  - **Can select all** - Inserts an *All* option in the list. When the user selects *All* from the list of values, you can pass a null value for the parameter.  
  
Using \* passes a null, so you must handle the null in your data source. A method to handle the null would be the standard Oracle NVL command, for example: `where customer_id = nvl(:cstid, customer_id)` where `cstid` is a value passed from the list of values, and when the user selects *All* it passes a null value.
  - **Refresh other parameters on change** — Performs a partial page refresh to refresh any other parameters whose values are dependent on the value of this one.

The figure below shows how the Department menu type parameter displays to the report consumer when multiple selection isn't enabled.





The figure below shows how the Department menu type parameter displays to the report consumer when multiple selection is enabled.



## Customize the Display of Menu Parameters

The display of menu parameters in the report can be further customized in the report definition.

Menu type parameters support the additional display option as a static list of checkboxes or radio buttons.

## Define a Date Parameter

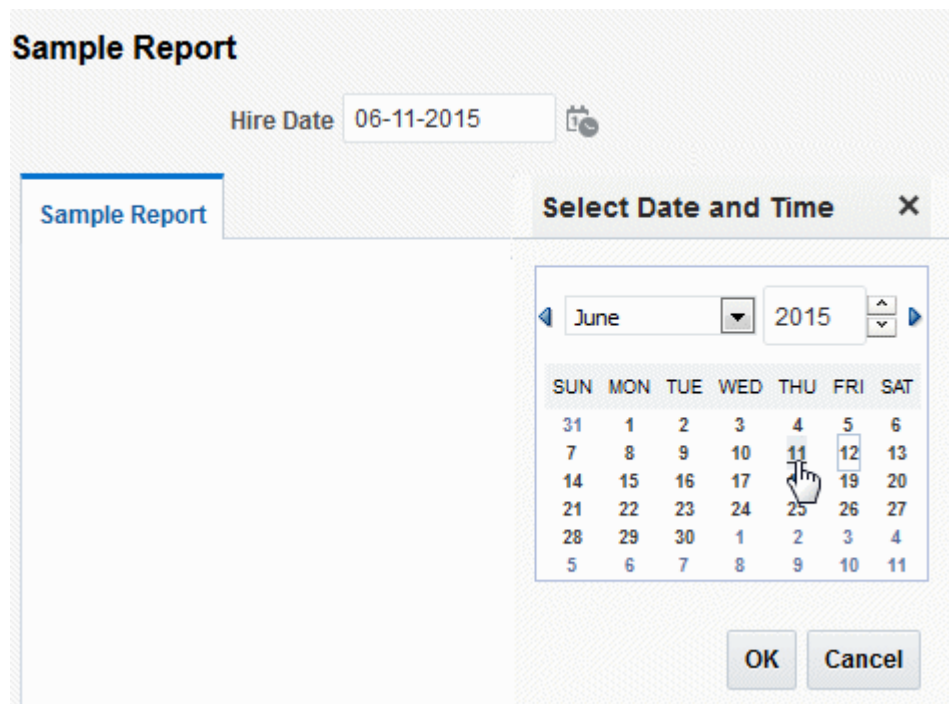
The Date type parameter provides a date picker to prompt the user to enter a date to pass as the parameter to the data source.

1. Select **Date** from the Parameter Type list. The lower pane displays the appropriate fields for your selection.
2. Enter the **Display Label**. The display label is the label that displays to users when they view the report. For example: Hire Date.
3. Enter the **Text Field Size** as an integer. This field determines the number of characters that the user can enter into the text box for the date entry. For example: 10.
4. Optional: Select **Ignore User Timezone** if you want to display the date parameter value in UTC.
5. Enter the **Date Format String**. The format must be a Java date format (for example, *MM-dd-yyyy*).

To bypass the server setting for the UTC time zone and retain the user preference time zone, add Z to the date format (for example, *MM-dd-yyyyZ*).

6. Optional: Enter a **Date From** and **Date To**. The dates entered here define the date range that are presented to the user by the date picker. For example if you enter the **Date From** as 01-01-1990, the date picker doesn't allow the user to select a date before 01-01-1990. Leave the **Date To** blank to enable all future dates.

The figure shows how the Hire Date parameter displays to the report consumer.



## Create a Point of View Parameter (POV)

The POV (Point of View) type parameter provides you a multidimensional view.

You can directly specify a POV parameter in an MDX query and create POV parameter, or you can create a POV parameter first and then update an MDX query to include the POV parameter in the WHERE clause. Before you create a POV type parameter in a data model, define the list of values for the POV parameter.

To create a POV parameter:

1. On the Data Model components pane, click **Parameters**.
2. Click **Create New Parameter**.
3. Enter a name for the parameter in the **Name** field.
4. Select **POV** from the **Parameter Type** list.
5. From the **Data Type** list, select **Text**.
6. Enter a default value for the parameter in the **Default Value** field.
7. In the **Row Placement** setting, configure the number of rows for displaying the parameters.
8. Use the **Reorder** column to specify the order for the parameter.
9. Enter a label in the **Display Label** field.
10. Select a LOV for the POV parameter from the **List of Values** list.

## Include a POV Parameter Value in an MDX Query

You can search a dimension in a cube and include a POV parameter value in an MDX query.

If you include a POV parameter in an MDX query of a data model, and if that POV parameter doesn't exist in the data model, Publisher creates that POV parameter in the data model when you save the query.

To include a POV parameter value in an MDX query:

1. On the component pane of the data model editor, click **Datasets**.
2. Click the MDX Query dataset that you want to edit.
3. Click **Edit Selected Dataset**.
4. In the WHERE clause of the MDX query, enter the name of the POV parameter enclosed in \${ }.

For example, if you want to create a POV parameter with name as P\_Year or if the P\_Year POV parameter exists in the data model, specify the condition as WHERE ([Year].[\${P\_Year}]

5. In the parameter value binding dialog, click the search icon next to the parameter.
6. In the select dimension dialog, select the cube, dimension, and value for the parameter.
7. Click **Select**.
8. Click **OK**.
9. Save the data model.

## Create a Search Parameter

You can use the Search type parameter to provide a box for entering search text and a search icon to search and list the values that match the search so that users can select.

Use the Search type parameter to find a value within a long list of values. You must create a LOV for the parameter before you define the Search type parameter.

To create a Search type parameter:

1. On the Data Model components pane, click **Parameters**, and then click **Create new Parameter**.
2. Enter a name for the parameter, select **String** from the **Data Type** list, and enter a default value for the parameter.
3. Select **Search** from the **Parameter Type** list.
4. Enter a label for the parameter in the **Display Label** field.
5. Select the LOV for the parameter from the **List of Values** list.
6. Optional: Select **Refresh other parameters on change**.

## About Lists of Values

A list of values is a defined set of values that a report consumer can select from to pass a parameter value to your data source.

If you define a menu type parameter, the list of values provides the menu of choices. You must define the list of values before you define the menu parameter. Only 999 values are allowed in a list.

Populate the list using one of the following methods:

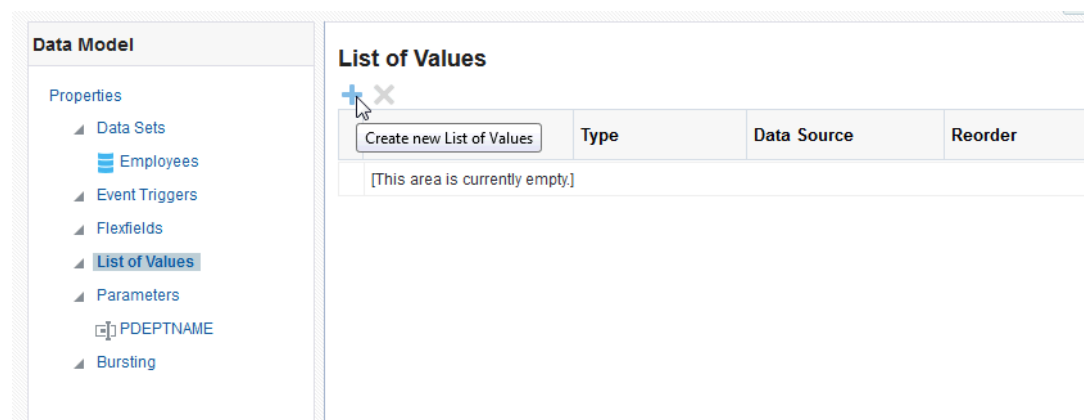
- **SQL Query** — Retrieves the values from a database using a SQL query.
- **Fixed Data** — Retrieves the values that a user manually enters.
- **MDX Query** — Retrieves the values from a POV or Slicer.
- **Flexfield**

Retrieves the values from a key flexfield defined in Oracle E-Business Suite. The flexfield option is only available when using the Oracle E-Business Suite security model.

## Add Lists of Values

You can create lists of SQL Query or Fixed Data values .

1. In the Data Model components pane, click **List of Values** and then click **Create new List of Values**.



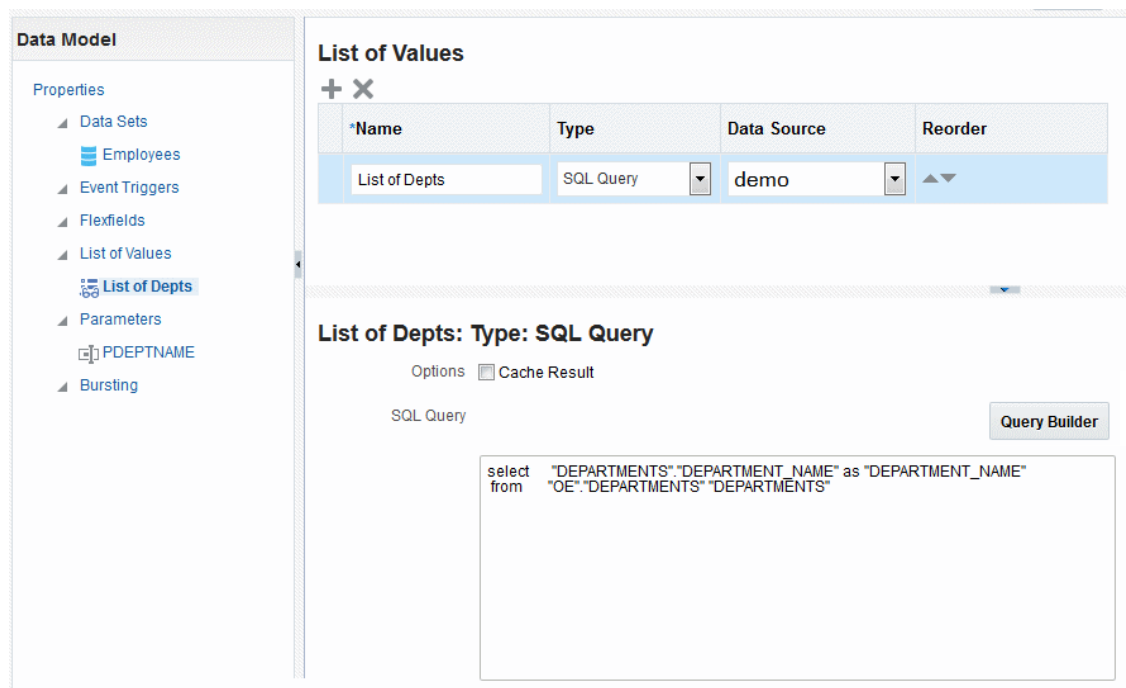
2. Enter a Name for the list and select a **Type**.

## Create a List from a SQL Query

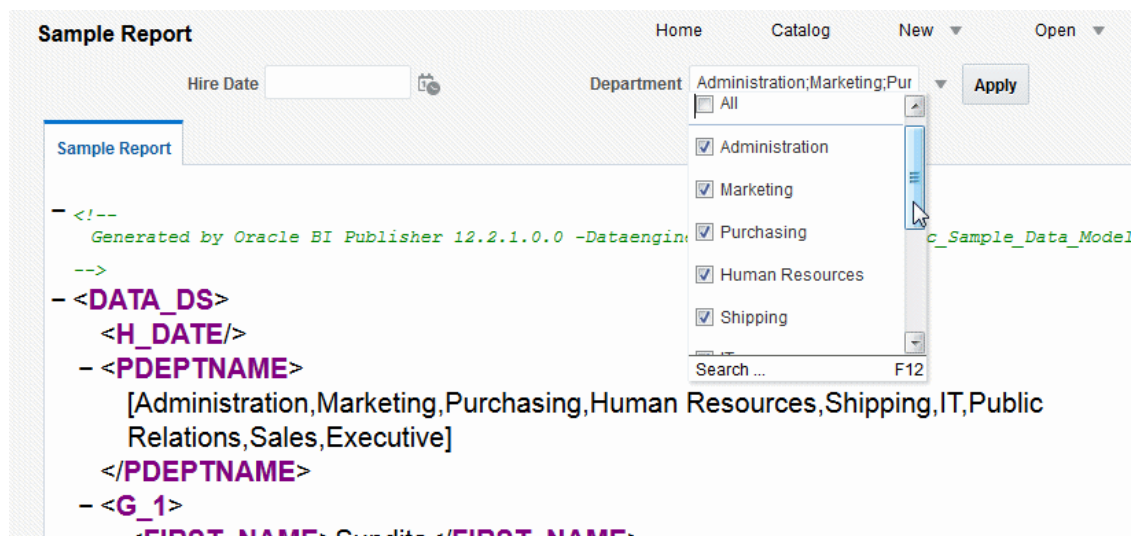
The data engine expects a (display) name-value pair from the list of values query. In the list of values select statement, the column listed first is used as the display name and the second is used for the value that is passed to the parameter in the dataset query by the data engine.

If the query returns only one column, then the same column value is used both as the list of values display name shown to the user and as the value that is passed to the parameter.

1. Select a **Data Source** from the list.
2. In the lower pane, select **Cache Result** (recommended) if you want the results of the query cached for the report session.
3. Enter the SQL query or use the Query Builder. The figure below shows a SQL query type list of values.



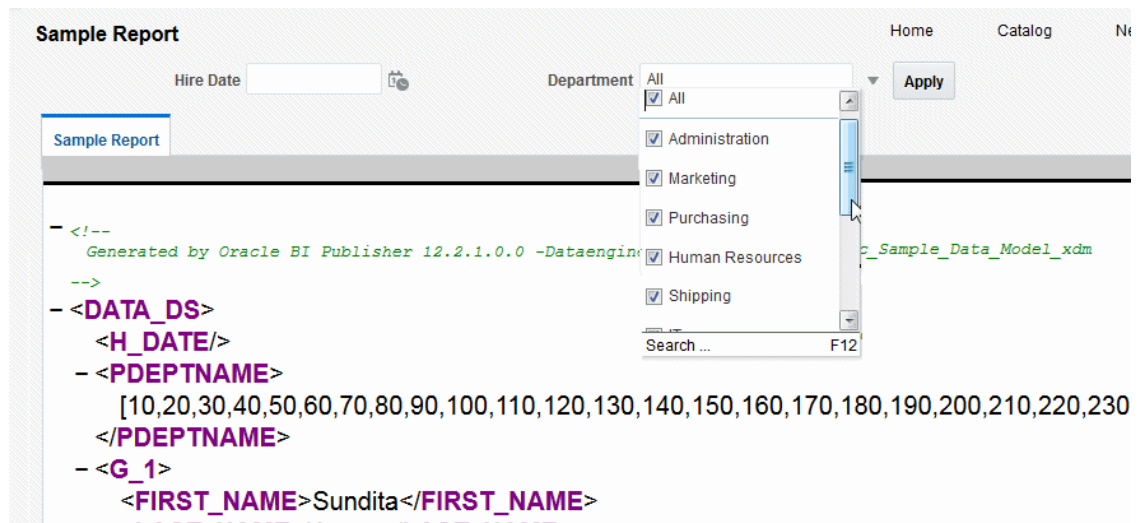
The SQL query shown below selects only the DEPARTMENT\_NAME column from the DEPARTMENTS table. In this case the list of values both displays the results of the query in the list and passes the same value to the parameter in the dataset. The figure below shows the list of values display entries and the values passed to the dataset. The menu items and the values shown for P\_DEPT are the DEPARTMENT\_NAME values.



If instead you wanted to pass the DEPARTMENT\_ID to the parameter in the dataset, and display the DEPARTMENT\_NAME in the list, construct your SQL query as follows:

```
Select  "DEPARTMENTS"."DEPARTMENT_NAME" as "DEPARTMENT_NAME",
        "DEPARTMENTS"."DEPARTMENT_ID" as "DEPARTMENT_ID"
from    "DEMO"."DEPARTMENTS" "DEPARTMENTS"
```

The figure below shows the list of values display entries and the values passed to the dataset. The menu lists the DEPARTMENT\_NAME while the values shown for P\_DEPT are the DEPARTMENT\_ID values.



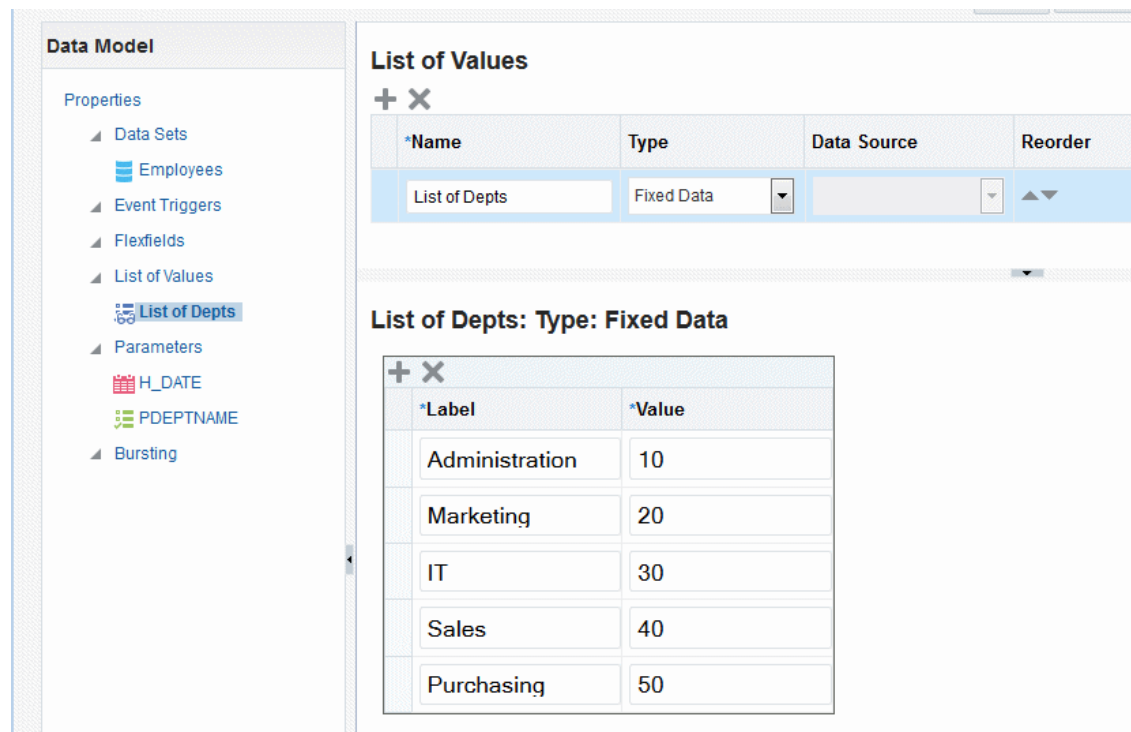
## Create a List from a Fixed Dataset

Create a list from a fixed dataset for each label-value pair required.

When you create a label-value pair, the label is displayed to the user in the list. The value is passed to the data engine.

1. In the lower pane, click the **Create new List of Values** icon to add a Label and Value pair.
2. Repeat for each label-value pair required.

The figure below shows fixed data type list of values.



## Create a List from an MDX Query

You can use an MDX query to create a list of multidimensional values by specifying the slice of an Essbase cube.

To create a list from an MDX query:

1. In the Data Model components pane, click **List of Values**.
2. Click **Create New List of Values**.
3. Enter a name for the list in the **Name** field.
4. Select **MDX Query** from the **Type** list.
5. Select an OLAP data source from the **Data Source** list.
6. In the lower pane, select **Cache Result** (recommended) if you want the results of the query cached for the report session.
7. Select the POV / Slicer for the MDX query.
  - a. Click the POV / Slicer search icon.
  - b. Select a cube.
  - c. Select a dimension.

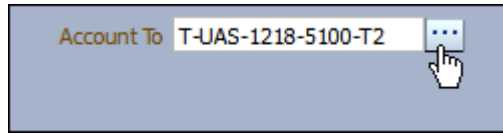
The POV / Slicer field displays the selected cube and dimension in the *cube.dimension* format.

## Add Flexfield Parameters

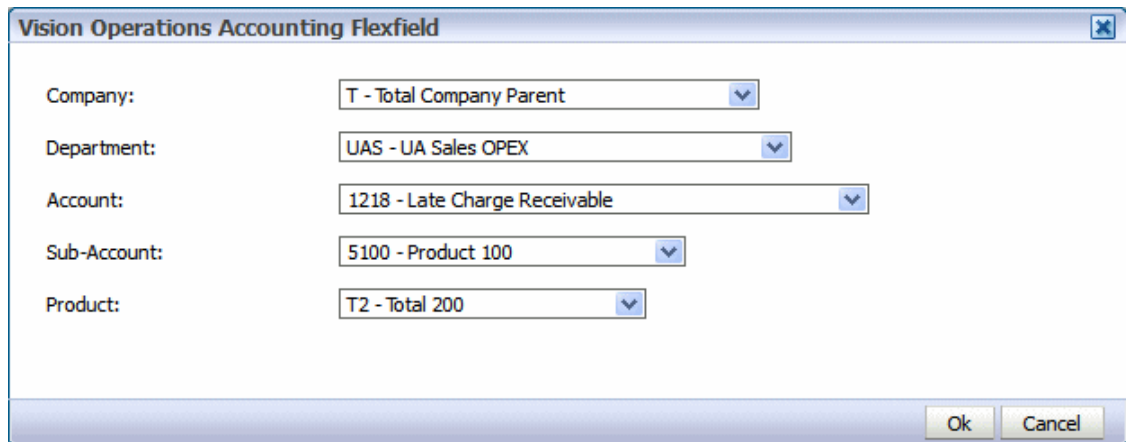
Oracle E-Business Suite customers who have configured Publisher to use E-Business Suite security can create reports that leverage key flexfields as parameters.

When you define a data model to pass a key flexfield as a parameter, Publisher presents a dialog to the report consumer to make selections for the flexfield segments to pass as parameters to the report, similar to the way flexfields are presented when running reports through the concurrent manager in the E-Business Suite.

The flexfield list of values displays in the report viewer as shown below.



The flexfield list of values displays as a dialog from which you select the segment values, as shown below.



## Prerequisites for Using Flexfields

When defining a list of values, E-Business Suite customers see a list Type called "Flexfield".

To enable the flexfield type list of values, configure to use E-Business Suite Security. The flexfield must already be defined in the E-Business Suite.

## Add a Flexfield Parameter and List of Values

Add flexfield parameters by adding the list of values.

The flexfield type list of values retrieves the flexfield metadata definition to present the appropriate values for each segment in the flexfield list of values selection dialog. Use the flexfield parameter to pass values to the Flexfield defined in the Data Model.

At runtime the `&flexfield_name` reference is replaced with the lexical code constructed based on the values in the Flexfield component definition.

1. Add the flexfield list of values (LOV).
2. Add a parameter and associate it with the flexfield LOV by selecting your flexfield list of values as the source menu for the parameter.



3. Add the Flexfield component to the data model.
4. Reference the Flexfield in your SQL query using the `&flexfield_name` syntax.

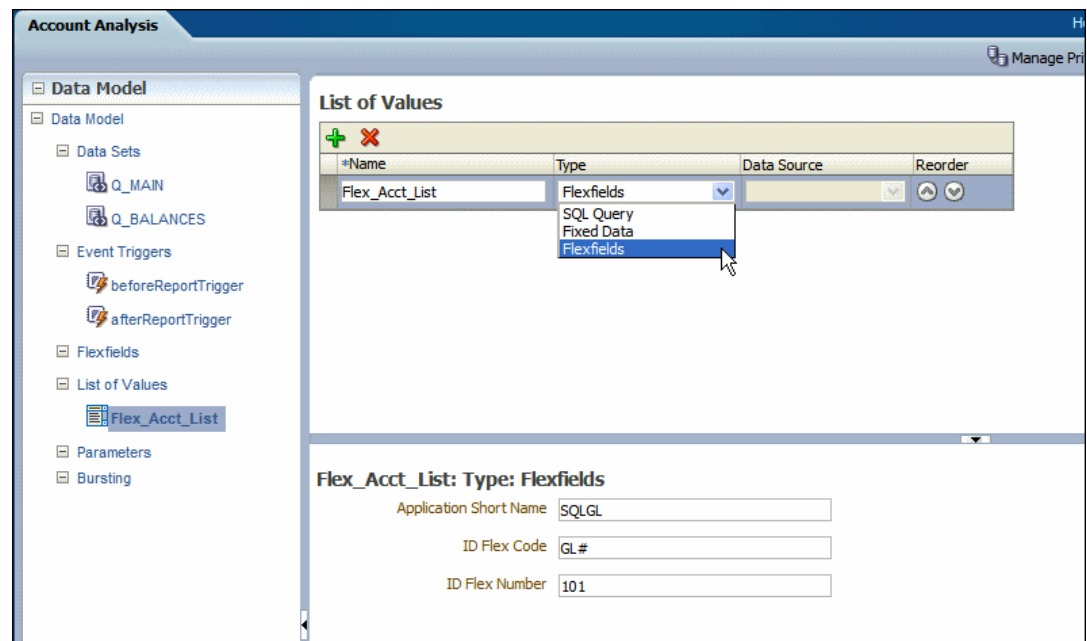
## Add the Flexfield List of Values

Add a list of values retrieved from a flexfield definition.

When you choose Flexfields as the Type, the **Data Source** option is no longer editable. All flexfields type lists of values use the Oracle E-Business Suite as the data source.

1. On the Data Model components pane, click **List of Values** and then click **Create new List of Values**.
2. Enter a **Name** for the list and choose Flexfields as the **Type**.
3. In the Flex\_Acct\_List: Type: Flexfields pane, enter the following:
  - **Application Short Name** - E-Business Suite application short name, for example: SQLGL.
  - **ID Flex Code** - Flexfield code defined for this flexfield in the Register Key Flexfield form, for example: GL#.
  - **ID Flex Number** - Name of the source column or parameter that contains the flexfield structure information, for example: 101 or :STRUCT\_NUM. If you use a parameter, ensure that you define the parameter in the data model.

The image shows a sample flexfield type, *LOV*.



## Add the Menu Parameter for the Flexfield List of Values

Define the parameter to display the flexfield list of values and capture the values selected by the user.

The Flexfield type parameter definition includes an additional field called **Range** to support range flexfields. A range flexfield supports low and high values for each key segment rather than just single values. You can customize the default value of the flexfield and row placement

in the report definition. The row placement determines where this parameter appears in the report viewer.

The following options are disabled for flexfield parameters: **Number of Values to Display in List**, **Multiple Selection**, **Can select all**, and **Refresh other parameters on change**.

1. On the Data Model components pane, click **Parameters** and then click **Create new Parameter**.
2. Select **Menu** from the **Parameter Type** list.
3. Choose *String* or *Integer* as the **Data Type**.
4. Enter a **Default Value** for the flexfield parameter.
5. Enter the **Row Placement**.
6. Enter the **Display Label**. The display label is the label that displays to users when they view the report. For example: *Account From*.
7. Select the **List of Values** that you defined for this parameter.

When you select a list of values that is the Flexfield type, an additional field labeled **Range** displays.

The image shows a parameter definition for the flexfield list of values.

*Name	Data Type	Default Value	Parameter Type	Row Placement	Reorder
P_Acct_list	String	T-UAS-PTPL-T-T2	Menu	1	

**P\_Acct\_list: Type: Menu**

Display Label: Account

List of Values: Flex\_Acct\_List

Number of Values to Display in List: 100

Range: None

Options:

- ☐ Multiple Selection
- ☒ Can select all
- ☒ NULL Value Passed ☐ All Values Passed
- ☐ Refresh other parameters on change

## Use the Flexfield Parameter to Pass Values to a Flexfield Defined in the Data Model

After adding the Menu parameter to the flexfield list of values, you can pass the parameter values to a flexfield component in the data model.

To define the Flexfield in the data model:

1. On the Data Model components pane, click **Flexfields** and then click **Create new Flexfield**.
2. Enter the following:
  - **Name** — Enter a name for the flexfield component.

- **Type** — Select the flexfield type from the list. The type you select here determines the additional fields required.
  - **Application Short Name** — Enter the short name of the Fusion Applications Suite application that owns this flexfield (for example, GL).
  - **ID Flex Code** — Enter the flexfield code defined for this flexfield in the Register Key Flexfield form (for example, GL#).
  - **ID Flex Number** — Enter the name of the source column or parameter that contains the flexfield structure information. For example: 101. To use a parameter, prefix the parameter name with a colon, for example, :PARAM\_STRUCT\_NUM.
3. In the lower region of the page, enter the details for the type of flexfield you selected. For the field that is to take the parameter value, enter the parameter name prefixed with a colon, for example, :P\_Acct\_List.

In the figure below the Flexfield component is defined as a "Where" **Type**. The parameter :P\_Acct\_List is entered in the Operand1 field. At runtime, values selected by the user for the parameter P\_Acct\_List will be used to create the where clause.

Name	Type	Application Short Name	ID Flex Code	ID Flex Number	Reorder
Acct_Flex	Where	SQLGL	GL#	:P_STRUCT_NUM	

**Acct\_Flex: Type: Where**

Code Combination Table Alias:

Segments:

Operator:

Operand1:

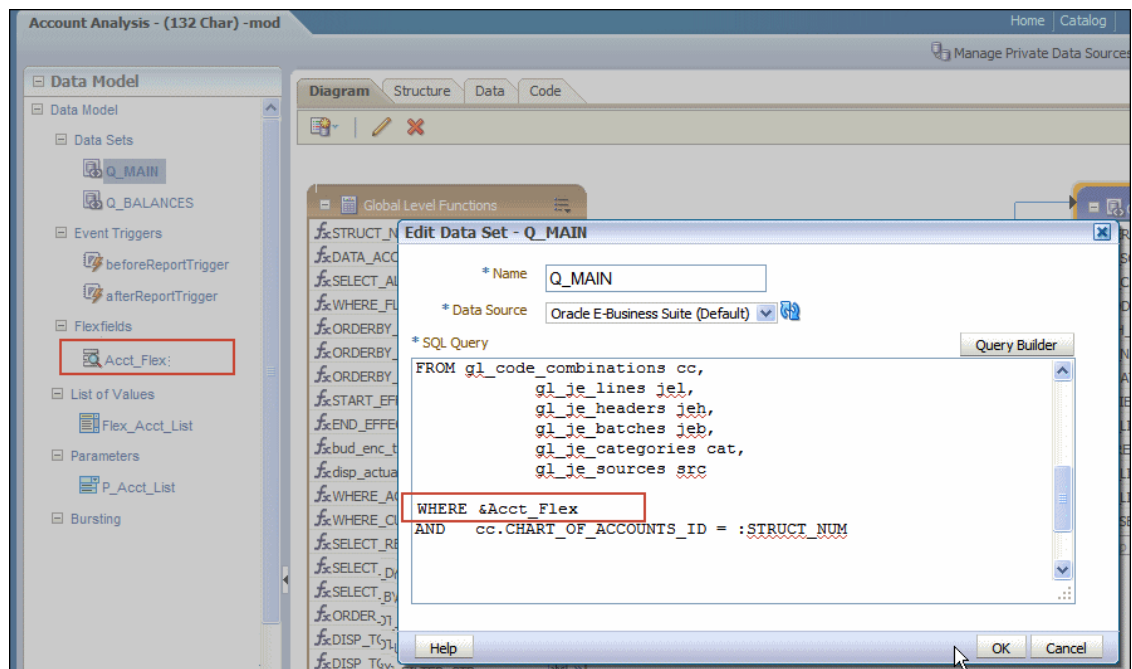
Operand2:

Metadata Type:

## Reference the Flexfield in the SQL Query

Finally, create the SQL query against the E-Business Suite database.

Use the lexical syntax in the SQL query. In the figure below &Acct\_Flex is the Flexfield lexical called in the where condition of the SQL query.



## Pass a Range of Values

To define the parameters for the flexfield lists of values when you want to pass a range of values you create two menu parameters that both reference the same flexfield LOV.

At runtime users choose a high value from the list of values and a low value from the same list of values. These two values are then passed as operands to the flexfield component of the data model.

1. Create one flexfield LOV.
2. Create the high range parameter. For the **Range** field, select **High** to designate this parameter as the high value.
3. Create the low range parameter. For the **Range** field, select **Low** to designate this parameter as the low value. Both parameters reference the flexfield list of values that you created in Step 1. The figure below shows creating the parameters to define the range.

*Name	Data Type	Default Value	Parameter Type	Row Placement	Reorder
P_Acct_List_Low	String	T-UAS-PTPL-T-T2	Menu	1	
P_Acct_List_High	String	T-UAS-PTPL-T-T2	Menu	1	

**P\_Acct\_List\_Low: Type: Menu**

Display Label: Account From:

List of Values: Flex\_Acct\_List

Number of Values to Display in List: 100

Range: Low

Options:

- ☐ Multiple Selection
- ☒ Can select all
  - ☒ NULL Value Passed
  - ☐ All Values Passed
- ☐ Refresh other parameters on change

4. Create the Flexfield in the data model.

In the lower region of the page, enter the details for the type of flexfield you selected. Enter the parameter prefixed with a colon for example, :P\_Acct\_List.

In the figure below the Flexfield component is defined as a "Where" **Type**. The parameters :P\_FLEX\_LOW and :P\_FLEX\_HIGH are entered in the Operand1 and Operand2 fields. At runtime, values selected by the user for the parameters P\_FLEX\_LOW and P\_FLEX\_HIGH will be used to create the where clause.

*Name	Type	Application Short Name	ID Flex Code	ID Flex Number	Reorder
FLEX_WHERE_ALL	Where	SQLGL	GL#	:P_STRUCT_NUM	

**FLEX\_WHERE\_ALL: Type: Where**

Code Combination Table Alias:

Segments: ALL

Operator: BETWEEN

Operand1: :P\_FLEX\_LOW

Operand2: :P\_FLEX\_HIGH

When the report associated with this data model is displayed in the report viewer, the report consumer sees the two flexfield parameters as shown below.

**Account Analysis**

Account From: 02-120-PT-T-400 ... Account To: T-UAS-PTPL-T-T2 ... Apply

When the report consumer clicks either the high or low flexfield indicator (...), a dialog launches enabling input of both the high and low values as shown below.

Account Analysis

Account From: 02-120-PT-T-400 ... Account To: T-UAS-PTPL-T-T2 ... Apply

Account Analysis - (132... Untitled1 Untitled321

**Vision Operations Accounting Flexfield**

Low	High
Company: 02 - Distribution	T - Total Company Parent
Department: 120 - Machine Resources	UAS - UA Sales OPEX
Account: PT - Parent Total	PTPL - Parent P&L
Sub-Account: T - Total Sub-Account	T - Total Sub-Account
Product: 400 - Mobile	T2 - Total 200

Ok Cancel

The display characteristics in the report viewer of the range flexfield parameter resemble closely the presentation of range flexfields in the E-Business Suite.

# 5

## Add Event Triggers

This topic describes how to define triggers in your data model. Data models support before data and after data event triggers and schedule triggers.

### Topics:

- [About Triggers](#)
- [Add Before Data and After Data Triggers](#)
- [Create Schedule Triggers](#)

## About Triggers

An event trigger checks for an event and when the event occurs, it runs the code associated with the trigger.

Publisher supports three types:

- **Before Data** - Fires right before the dataset is executed.
- **After Data** - Fires right after the data engine executes all datasets and generates the XML.
- **Schedule Trigger** - Fires when a scheduled job is triggered and before it runs.

Before data and after data triggers execute a PL/SQL function stored in a PL/SQL package in your Oracle Database. The return data type for a PL/SQL function inside the package must be a Boolean type and the function must explicitly return TRUE or FALSE.

A schedule trigger is associated with a scheduled job. It's a SQL query that executes at the time a report job is scheduled to run. If the SQL returns any data, the report job runs. If the SQL query returns no data, the job instance is skipped.

Event triggers accept only one value in a parameter. If you pass multiple values to a schedule event trigger parameter, the status of the scheduled job is set to Skipped.

Event triggers aren't used to populate data used by a bursting definition. See [Add Bursting Definitions](#).

## Add Before Data and After Data Triggers

You can add event triggers that fire before and after data.

If you define a default package then you must define all parameters as a global PL/SQL variable in the PL/SQL package. You can then explicitly pass parameters to your PL/SQL function trigger or all parameters are available as a global PL/SQL variable, see [Data Model Properties](#)

1. On the data model **Properties** pane, enter the **Oracle DB Default Package** that contains the PL/SQL function signature to execute when the trigger fires. .
2. From the task pane, click **Event Triggers**.
3. From the **Event Triggers** pane, click **Create New Event Trigger**.

4. Enter the following for the trigger:
  - **Name** - Name the trigger something meaningful.
  - **Type** - Select Before Data or After Data.
  - **Language** - Select PL/SQL.

The figure below shows an event trigger.

**Event Triggers**

Name	Type	Language	Reorder
afterReportTrigger	After Data	PL/SQL	⬆ ⬇
beforeReportTrigger	Before Data	PL/SQL	⬆ ⬇
afterParameterFormTrigger	Before Data	PL/SQL	⬆ ⬇
setOragContext	Before Data	PL/SQL	⬆ ⬇

**afterReportTrigger**

Oracle DB Default Package: WSH\_BILL\_OF\_LADING\_RPT Update Default Package

**Available Functions**

- Packages
  - mi1yd580
    - WSH\_BILL\_OF\_LADING\_RPT
      - AFTERPFORM
      - AFTERREPORT
      - BEFOREREPORT
      - CF\_1FORMULA
      - CF\_CARRIER\_NAMEFORMULA
      - CF\_COMMODITY\_CLASSFORMU

**Event Trigger**

WSH\_BILL\_OF\_LADING\_RPT.afterreport()

5. Select the package from the **Available Functions** box and click the arrow to move a function to the **Event Trigger** box.

The name appears as PL/SQL <package name>.<function name>.

## Order of Execution

If you define multiple triggers of the same type, they fire in the order that they appear in the table (from top to bottom).

To change the order of execution:

- Use the **Reorder** arrows to place the triggers in the correct order.

## Create Schedule Triggers

A schedule trigger fires when a report job is scheduled to run. Schedule triggers are of type SQL Query.

When a report job is scheduled to run, the schedule trigger executes the SQL statement defined for the trigger. If data is returned, then the report job is submitted. If data isn't returned from the trigger SQL query, the report job is skipped.



The schedule trigger that you associate with a report job can reside in any data model in the catalog. You don't need to create the schedule trigger in the data model of the report for which you want to execute the trigger. You can reuse schedule triggers across multiple report jobs.

1. In the data model editor task pane, click **Event Triggers**.
2. From the **Event Triggers** pane, click the **Create New** icon.
3. Enter the following for the trigger:
  - **Name** - Enter a name for the trigger.
  - **Type** - Select **Schedule**.
  - **Language** - Accept the default value, SQL Query.
4. In the lower pane, enter the following:
  - **Options** - Select this check box to cache the results of the trigger query.
  - **Data Source** - Select the data source for the trigger query.
  - **SQL Query** - Enter the query in the text area, or click **Query Builder** to use the utility to construct the SQL query, see [Use the SQL Query Builder](#).

You can include parameters in the trigger query. Define the parameter in the same data model as the trigger. Enter parameter values when you schedule the report job.

The schedule trigger queries don't support multi-select parameters. If your query expects a set of values, modify your query.

If the SQL query returns any results, the scheduled report job executes. The figure below shows a schedule trigger to test for inventory levels based on a parameter value that can be entered at runtime.

**Data Model**

Properties

- Data Sets
- Employees
- Event Triggers
- Quantity**
- Flexfields
- List of Values
- List of Depts
- Parameters
- H\_DATE
- PQuantity
- Bursting

**Event Triggers**

Name	Type	Language	Reorder
Quantity	Schedule	SQL Query	▲ ▼

**Quantity: Language: SQL Query**

Options ☐ Cache Result

Data Source **demo**

SQL Query

```
select 'true'
from 'OE':'OC_INVENTORIES':'OC_INVENTORIES'
where 'OC_INVENTORIES':'QUANTITY_ON_HAND' < :pQuantity
```

# 6

## Add Flexfields

This topic describes the support for flexfields in data models.

### Topics:

- [About Flexfields](#)
- [Add Key Flexfields](#)

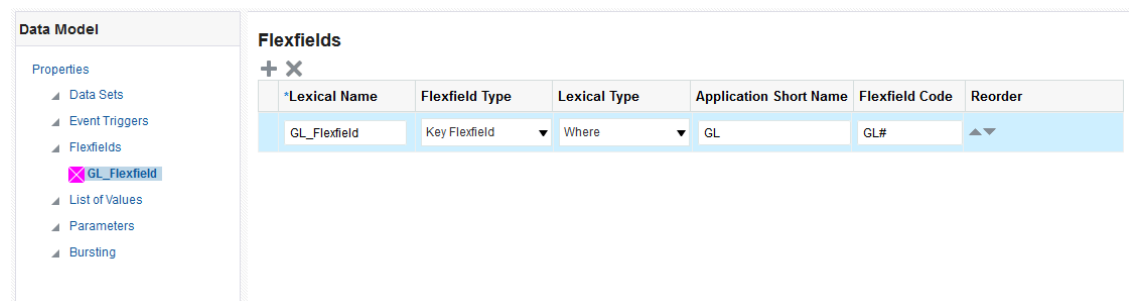
## About Flexfields

A flexfield is a data field that your organization can customize to your business needs without programming.

Oracle Fusion Cloud Applications Suite applications use two types of flexfields:

- key flexfields  
A key flexfield is a field you can customize to enter multi-segment values such as part numbers, account numbers, and so on.
- descriptive flexfields  
A descriptive flexfield is a field you customize to enter additional information for which your application hasn't provided a field.

If you are reporting on data from an application in Fusion Applications Suite, use the Flexfield component of the data model to retrieve flexfield data.



Before including flexfields in your reports, you should understand flexfields in your applications.

## Use Flexfields in Your Data Model

Use flexfields based on SQL SELECT statements in your data model.

To use flexfields in your SQL-based data model:

- Add the **Flexfield** component to the data model as described in this chapter.
- Define the SQL SELECT statement against the applications data tables.

- Within the SELECT statement, define each flexfield as a lexical. Use the &LEXICAL\_TAG to embed flexfield related lexicals into the SELECT statement.

## Add Key Flexfields

You can use key flexfield references to replace the clauses appearing after SELECT, FROM, WHERE, ORDER BY, or HAVING.

Use a flexfield reference when you want the parameter to replace multiple values at runtime. The data model editor supports the following flexfield types:

- **Where** - This type of lexical is used in the WHERE section of the statement. Use it to modify the WHERE clause such that the SELECT statement can filter based on key flexfield segment data.
- **Order by** - This type of lexical is used in the ORDER BY section of the statement. Use it to obtain a list of column expressions so that the resulting output can be sorted by the flex segment values.
- **Select** - This type of lexical is used in the SELECT section of the statement. Use it to retrieve and process key flexfield (kff) code combination related data based on the lexical definition.
- **Filter** - This type of lexical is used in the WHERE section of the statement. Use it to modify the WHERE clause such that the SELECT statement can filter based on Filter ID passed from Oracle Enterprise Scheduling Service.
- **Segment Metadata** - Use it to retrieve flexfield-related metadata. You don't have to write PL/SQL code to retrieve this metadata. Instead, define a dummy SELECT statement, then use this lexical to get the metadata. This lexical should return a constant string.

After you set up the flexfield components of your data model, create a flexfield lexical reference in the SQL query using the following syntax:

&LEXICAL\_TAG ALIAS\_NAME

for example:

&FLEX\_GL\_BALANCING alias\_gl\_balancing

After entering the SQL query, when you click **OK**

- Enter the following:
  - **Lexical Name** - Enter a name for the flexfield component.
  - **Flexfield Type** - Select **Key Flexfield**.
  - **Lexical Type** - Select the type from the list. Your selection here determines the additional fields required. See [Enter Flexfield Details](#).
  - **Application Short Name** - Enter the short name of the Fusion Applications Suite application that owns this flexfield, for example, *GL*.
  - **Flexfield Code** - Enter the flexfield code defined for this flexfield. In Oracle E-Business Suite this code is defined in the Register Key Flexfield form, for example, *GL#*.
  - **ID Flex Number** - Enter the name of the source column or parameter that contains the flexfield structure information. For example: 101. To use a parameter, prefix the parameter name with a colon, for example, *:PARAM\_STRUCT\_NUM*.

## Enter Flexfield Details

The Details region displays appropriate fields depending on the Lexical Type you chose.

### Fields for Key Flexfield Type: Segment Metadata

The table describes the detail fields for segmented metadata.

Field	Description
Structure Instance Number	Enter the name of the source column or parameter that contains the flexfield structure information. For example: 101. To use a parameter, prefix the parameter name with a colon, for example, :PARAM_STRUCT_NUM.
Segments	(Optional) Identifies for which segments this data is requested. Default value is "ALL". See <i>Oracle E-Business Suite Developer's Guide</i> for syntax.
Show Parent Segments	Select this box to automatically display the parent segments of dependent segments even if it's not displayed in the segments attribute.
Metadata Type	Select the type of metadata to return: Above Prompt of Segments — Above prompt of segment(s). Left Prompt of Segments — Left prompt of segment(s)

### Fields for Key Flexfield Type: Select

The table below shows the detail fields for the Select flexfield type.

Field	Description
Enable Multiple Structure Instances	Indicates whether this lexical supports multiple structures. Checking this box indicates all structures are potentially used for data reporting. The data engine uses <code>&lt;code_combination_table_alias&gt;.&lt;set_defining_column_name&gt;</code> to retrieve the structure number.
Code Combination Table Alias	Specify the table alias to prefix to the column names. Use TABLEALIAS if your SELECT joins to other flexfield tables or uses a self-join.
Structure Instance Number	Enter the name of the source column or parameter that contains the flexfield structure information. For example: 101. To use a parameter, prefix the parameter name with a colon, for example, :PARAM_STRUCT_NUM.
Segments	(Optional) Identifies for which segments this data is requested. Default value is "ALL". See <i>Oracle E-Business Suite Developer's Guide</i> for syntax.
Show Parent Segments	Select this box to automatically display the parent segments of dependent segments even if it's not displayed in the segments attribute.

Field	Description
Output Type	<p>Select from the following:</p> <ul style="list-style-type: none"> <li>• <b>Value</b> — Segment value as it's displayed to users.</li> <li>• <b>Padded Value</b> — Padded segment value as it's displayed to users. Number type values are padded from the left. String type values are padded on the right.</li> <li>• <b>Description</b> — Segment value's description up to the description size defined in the segment definition.</li> <li>• <b>Full Description</b> — Segment value's description (full size).</li> <li>• <b>Security</b> — Returns Y if the current combination is secured against the current user, N otherwise.</li> </ul>

### Fields for Key Flexfield Type: Where

The table below shows the detail fields for the Where key flexfield type.

Field	Description
Code Combination Table Alias	Specify the table alias to prefix to the column names. You use TABLEALIAS if your SELECT joins to other flexfield tables or uses a self-join.
Structure Instance Number	Enter the name of the source column or parameter that contains the flexfield structure information. For example: 101. To use a parameter, prefix the parameter name with a colon, for example, :PARAM_STRUCT_NUM.
Segments	(Optional) Identifies for which segments this data is requested. Default value is "ALL". See <i>Oracle E-Business Suite Developer's Guide</i> for syntax.
Operator	Select the appropriate operator.
Operand1	Enter the value to use on the right side of the conditional operator.
Operand2	(Optional) High value for the BETWEEN operator.

### Fields for Key Flexfield Type: Order By

The table below shows the detail fields for the Order by flexfield type.

Field	Description
Enable Multiple Structure Instances	Indicates whether this lexical supports multiple structures. Selecting this box indicates all structures are potentially used for data reporting. The data engine uses <code>&lt;code_combination_table_alias&gt;.&lt;set_defining_column_name&gt;</code> to retrieve the structure number.
Structure Instance Number	Enter the name of the source column or parameter that contains the flexfield structure information. For example: 101. To use a parameter, prefix the parameter name with a colon, for example, :PARAM_STRUCT_NUM.
Code Combination Table Alias	Specify the table alias to prefix to the column names. You use TABLEALIAS if your SELECT joins to other flexfield tables or uses a self-join.
Segments	(Optional) Identifies for which segments this data is requested. Default value is "ALL". See <i>Oracle E-Business Suite Developer's Guide</i> for syntax.

Field	Description
Show Parent Segments	Select this box to automatically display the parent segments of dependent segments even if it's not displayed in the segments attribute.

### Fields for Key Flexfield Type: Filter

The table below shows the detail fields for the Filter flexfield type.

Field	Description
Code Combination Table Alias	Specify the table alias to prefix to the column names. You use TABLEALIAS if your SELECT joins to other flexfield tables or uses a self-join.
Structure Instance Number	Enter the name of the source column or parameter that contains the flexfield structure information. For example: 101. To use a parameter, prefix the parameter name with a colon, for example, :PARAM_STRUCT_NUM.

## Add Descriptive Flexfields

Reporting on descriptive flexfields is supported only for Oracle Fusion Cloud Applications.

### 1. Enter the basic flexfield information:

- **Name** - Enter a name for the flexfield component.
- **Flexfield Type** -Select **Descriptive Flexfield**.
- **Lexical Type** - Only **Select** is supported.
- **Application Short Name** - Enter the short name of the Oracle Fusion Cloud Applications that owns this flexfield (for example, FND).
- **Flexfield Code** - Enter the flexfield code defined for this flexfield in the Register Descriptive Flexfield form, for example, FND\_DFF1.

#### Flexfields



*Lexical Name	Flexfield Type	Lexical Type	Application Short Name	Flexfield Code	Reorder
DFF_SELECT	Descriptive Flexfield ▼	Select ▼	FND	FLEX_DFF1	▲▼

### 2. Enter the flexfield details:

- **Table Alias** -Specify the table alias to prefix to the column names. Use TABLEALIAS if your SELECT joins to other flexfield tables or uses a self-join.
- **Flexfield Usage Code** - (Optional) Identifies for which segments this data is requested. Default value is "ALL".

### 3. If your descriptive flexfield definition includes parameters, you can enter the parameters in the Parameters region.

To enter parameters, click + to add each parameter. Enter a **Label** and a **Value** for each parameter. The Label must match exactly the label in the descriptive flexfield definition.

**GL\_Flexfield: Type: Select**

Table Alias: FND\_DF\_DFF1\_T1

Flexfield Usage Code: FLEX\_DFF1

**Parameters**

*Label	*Value
ALL SEGMENTS	3

## Include Descriptive Flexfield Reference in SQL Queries

When you create the SQL data set, you can include the descriptive flexfield using the ampersand symbol.

For example, the figure below shows &DFF\_SELECT referencing of the descriptive flexfield.

**New Data Set - SQL Query**

\* Name: Q1

\* Data Source: demo (Default)

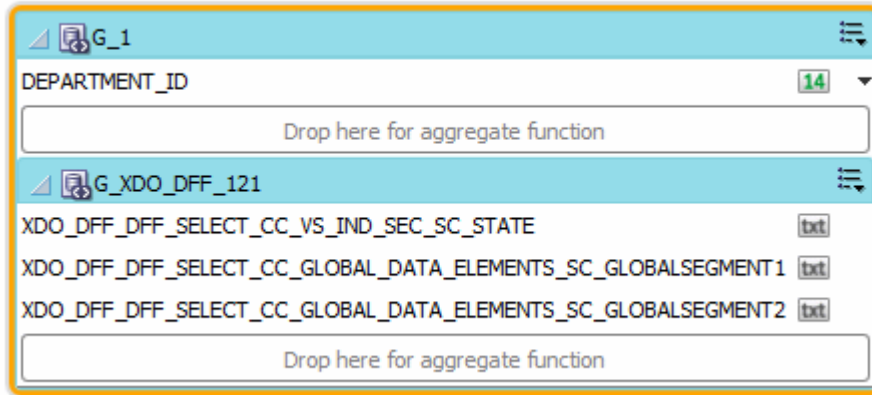
\* Type of SQL: Standard SQL

\* SQL Query: SELECT department\_id, &DFF\_SELECT FROM departments

Query Builder

Generate Explain Plan OK Cancel

When you click OK, the diagram of your data set shows the columns that are returned from your descriptive flexfield as shown below.



The columns that are returned from the key flexfield have the following limitations:

- Element properties are disabled
- In the data model Structure tab, you cannot edit the following fields: XML Tag Name, Value if Null, Display Name, Data Type
- Subgrouping of descriptive flexfield elements isn't supported
- Element linking isn't supported



# 7

## Add Bursting Definitions

This topic describes the support for bursting reports and how to define a bursting definition in the data model to split and deliver your report to multiple recipients.

### Topics:

- [About Bursting](#)
- [What is the Bursting Definition?](#)
- [Prerequisites for Configuring Bursting](#)
- [Add a Bursting Definition to Your Data Model with an SQL Query](#)
- [Use a Visualized Dataset to Add a Bursting Definition to Your Data Model](#)
- [Define the Query for Delivery XML](#)
- [Pass a Parameter to the Bursting Query](#)
- [Define the Split By and Deliver By Elements for a CLOB/XML Dataset](#)
- [Configure a Report to Use a Bursting Definition](#)
- [Sample Bursting Query](#)
- [Create a Table to Use as a Delivery Data Source](#)

## Prerequisites for Configuring Bursting

This topic lists the prerequisites for configuring bursting.

Before you define bursting in the data model and enable bursting in your report, make sure:

- The administrator has configured the Publisher connections to data sources, delivery destinations, and the permissions to enable users to access resources.
- You've defined a SQL query dataset or a dataset from Data Modeler for this data model.
- The dataset is sorted or grouped by the element by which you want to split the data in your bursting definition.
- The delivery and formatting information is available to Publisher. You can provide the information at runtime to Publisher in one of the following ways:
  - The information is stored in a database table available to Publisher for a dynamic delivery definition.
  - The information is hard-coded in the delivery SQL for a static delivery definition.
- The report definition for this data model has been created and includes the layouts to be applied to the report data.

# Use a Visualized Dataset to Add a Bursting Definition to Your Data Model

You can use a visualized dataset to add a bursting definition to the data model, and then enable bursting in your report.

If you want to add the datasets created in the Dataset editor to your bursting definition, make sure you create the correct query in the Dataset editor, because you can't change the key and delivery channels after you add the dataset to the bursting definition in Publisher. See [Define the Query for Delivery XML](#), and create the bursting dataset with the same column names specified in the query for the delivery channel. For example, use column names such as KEY, OUTPUT\_FORMAT, DEL\_CHANNEL, OUTPUT\_NAME, PARAMETER1, and PARAMETER2.

1. On the component pane of the data model editor, click **Bursting** to create a bursting query.
2. On the Bursting definition table, click the **Create new Bursting** button.
3. Enter the following for this bursting definition:
  - **Name** - Enter a name for the query. For example, *Burst to Email*.
  - **Type** - Select **DV Datasets** to use a visualized dataset.
4. In the lower region, enter the following for this bursting definition:
  - **Split By** - Select the element from the dataset by which to split the data.
  - **Deliver By** - Select the element from the dataset by which to format and deliver the data.
  - **Enable Consolidated Output** - Select the checkbox to generate a single consolidated report.
  - **Group Data by Split Key Values** - Select the checkbox to group the data based on Split Key values.
  - **Dataset Name** - Browse and select the visualized dataset.

The bursting query is automatically populated and the bursting query is non-editable.

5. Save the data model.
6. In the Report Properties dialog, select **Enable Bursting** to enable bursting for a report.

If the Split By and Deliver By elements reside in an XML document stored as a CLOB in your database, you must enter the full XPATH in the Split By and Delivery By fields.

## About Bursting

Bursting is a process of splitting data into blocks, generating documents for each block, and delivering the documents to one or more destinations.

The data for the report is generated by executing a query once and then splitting the data based on a Key value. For each block of the data, a separate document is generated and delivered.

Bursting enables splitting a single report based on an element in the data model and delivering the report based on a second element in the data model. Driven by the delivery element, you can apply a different template, output format, delivery method, and locale to each split segment of the report. Example implementations include:

- Invoice generation and delivery based on customer-specific layouts and delivery preference.
- Financial reporting to generate a master report of all cost centers, splitting out individual cost center reports to the appropriate manager.
- Generation of pay slips to all employees based on one extract and delivered through e-mail.

### How do I burst data and deliver reports?

Refer to the following documentation to help you configure and deliver bursting reports.

Learn how to...	Audience	More Information
Configure connections to data sources, delivery destinations, and configure permissions to enable users to access resources	Administrator	Configure Delivery Options
Create data sets using the data sources and define bursting.	Data modeler or Content author	<a href="#">Process Overview for Creating a Data Model</a>
Design the report layout	Content author	Overview for Report Designers <a href="#">Overview for Report Designers</a>
Schedule jobs to deliver bursting reports	User	Create a Bursting Job

## What is the Bursting Definition?

A bursting definition is a component of Publisher data model. After you define the datasets for the data model, you can set up one or more bursting definitions.

When you set up a bursting definition, you define the following:

- The **Split By** element governs how the data is split. For example, to split a batch of invoices by each invoice, you may use an element called CUSTOMER\_ID. The dataset must be sorted or grouped by this element.
- The **Deliver By** governs how formatting and delivery options are applied. In the invoice example, it's likely that each invoice has delivery criteria determined by customer; therefore, the Deliver By element would also be CUSTOMER\_ID.
- The **Delivery Query** is a SQL query that you define to construct the delivery XML data file. The query must return the formatting and delivery details.

The bursting query timeout value is the same as the SQL query timeout value of 3600 seconds for scheduled reports (memory guard property timeout value). The bursting query timeout value doesn't consider the value of the data model query timeout. See [Tune SQL Query](#).

Before you define a bursting query, see [Define the Query for Delivery XML](#) and [Sample Bursting Query](#).

## Add a Bursting Definition to Your Data Model with an SQL Query

You can add a bursting definition to your data model.

Bursting doesn't support global functions in data model. If a data model contains global functions, the XML generated by a bursting job doesn't include the tags for the global functions. The global function elements are at the end section of the XML output. The XML output is cut

based on the Split By element specified in the bursting definition. The global function elements can't be included in the split XML document.

For example, consider the following XML output and the Split By element. The bursted XML document won't contain the global function elements:

- XML output: `<Data><G1><Invoice_id>10</Invoice_id><Invoice_Num>abcd#1</Invoice_Num>,,,</G1><GLobalFunc1>InvoiceAccountCode</GLobalFunc1></Data>`
- Split By element: `/Data/G1/Invoice_id`
- Bursted XML document: `<Data><G1><Invoice_id>10</Invoice_id><Invoice_Num>abcd#1</Invoice_Num>,,,</G1></Data>`

In the Bursting definition table, add a bursting definition by specifying its name, type, data source, and other properties.

1. On the component pane of the data model editor, click **Bursting** to create a bursting query.
2. In the Bursting definition table, click the **Create Bursting** button.
3. Enter the following for this bursting definition:
  - **Name** - Enter a name for the query. For example, *Burst to File*.
  - **Type** - Select **SQL Query**.
  - **Data Source** - Select the data source that contains the delivery information.
4. In the lower region, enter the following for this bursting definition:
  - **Split By** - Select the element from the dataset by which to split the data.
  - **Deliver By** - Select the element from the dataset by which to format and deliver the data.
  - **Enable Consolidated Output** - Select the option to generate a single consolidated report.
  - **Group Data by Split Key Values** - Select the option to group the data based on Split Key values.
  - **SQL Query** - Enter the query or click **QueryBuilder** to construct the bursting query.
  - **Attachment** - Attach external PDF files to your bursted PDF output, if required.
5. In the Report Properties dialog, select **Enable Bursting** to enable bursting for a report.

If the Split By and Deliver By elements reside in an XML document stored as a CLOB in your database, you must enter the full XPATH in the Split By and Delivery By fields.

## Attach PDF to Reports using Bursting Engine

You might have a requirement to attach PDFs along with invoices for customers. You can attach PDFs to reports while bursting.

Once a bursting query is defined, you can enter the attachment query in the **Attachment** tab. The attachment expects the repository source to be a WebCenter content, which can be defined as a data source by the Administrator.

1. Click the **Attachment** tab.
2. Select the content server name from the **Attachment Repository** LOV.
3. Define the SQL query for the attachment in the Content Server.

Publisher doesn't support parameters in the SQL query for attachment.

4. Click **Save** icon after you make changes to the data model.
5. Click the **View Data** button.
6. Click **View** to view the data.
7. Save the data by clicking **Save As Sample Data**.
8. To create a report based on the data model that you created, click **Create Report**.

Note that the PDF attachments are delivered to recipients along with the main report as a single PDF file. The attachment document isn't separately embedded, but appended to the report.

If you want to save the entire PDF report along with the attachments as a single consolidated file, then check the option **Enable Consolidated Output** under bursting query. The consolidated output contains the sequential merge of report and attachment of each burst. A user (with consumer role) who schedules the bursting report job and the Administrator will be able to view the consolidated output in the Job History Details page.

## Define the Query for Delivery XML

The bursting query is a SQL query that you define to provide the required information to format and deliver the report.

PublisherPublisher uses the results from the bursting query to create the delivery XML.

The bursting engine uses the delivery XML as a mapping table for each Deliver By element. The structure of the delivery XML required is as follows:

```
<ROWSET>
<ROW>
  <KEY></KEY>
  <TEMPLATE></TEMPLATE>
  <LOCALE></LOCALE>
  <OUTPUT_FORMAT></OUTPUT_FORMAT>
  <DEL_CHANNEL></DEL_CHANNEL>
  <TIMEZONE></TIMEZONE>
  <CALENDAR></CALENDAR>
  <OUTPUT_NAME></OUTPUT_NAME>
  <SAVE_OUTPUT></SAVE_OUTPUT>
  <PARAMETER1></PARAMETER1>
  <PARAMETER2></PARAMETER2>
  <PARAMETER3></PARAMETER3>
  <PARAMETER4></PARAMETER4>
  <PARAMETER5></PARAMETER5>
  <PARAMETER6></PARAMETER6>
  <PARAMETER7></PARAMETER7>
  <PARAMETER8></PARAMETER8>
  <PARAMETER9></PARAMETER9>
  <PARAMETER10></PARAMETER10>
</ROW>
</ROWSET>
```

- **KEY** — The Delivery key must match the **Deliver By** element. The bursting engine uses the key to link delivery criteria to a specific section of the burst data. Ensure that you use double quotes around "KEY" in the select statement, for example:

```
select d.department_name as "KEY",
```

- **TEMPLATE** — The name of the Layout to apply. Note that the value is the Layout name (for example, "Customer Invoice"), not the template file name (for example, invoice.rtf).
- **LOCALE** — The template locale, for example, "en-US".
- **OUTPUT\_FORMAT** — The output format. The following table shows the valid values to enter for the bursting query.

Output format	Value to enter in bursting query	Template types that can generate this output format
Interactive	N/A	Not supported for bursting
HTML	html	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
PDF	pdf	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– PDF</li> <li>– XSL Stylesheet (FO)</li> </ul>
RTF	rtf	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
Excel (mhtml)	excel	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– Excel</li> <li>– XSL Stylesheet (FO)</li> </ul>
Excel (html)	excel2000	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
Excel (*.xlsx)	xlsx	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
PowerPoint (mhtml)	ppt	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
PowerPoint (*.pptx)	pptx	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
MHTML	mhtml	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
PDF/A	pdfa	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
PDF/X	pdfx	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
Zipped PDFs	pdfz	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– PDF</li> <li>– XSL Stylesheet (FO)</li> </ul>

Output format	Value to enter in bursting query	Template types that can generate this output format
FO Formatted XML	xslfo	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– XSL Stylesheet (FO)</li> </ul>
Data (XML)	xml	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– PDF</li> <li>– Excel</li> <li>– XSL Stylesheet (FO)</li> <li>– XSL Stylesheet (HTML XML/Text)</li> <li>– Etext</li> </ul>
Data (CSV)	csv	<ul style="list-style-type: none"> <li>– PublisherPublisher</li> <li>– RTF</li> <li>– PDF</li> <li>– Excel</li> <li>– XSL Stylesheet (FO)</li> <li>– XSL Stylesheet (HTML XML/Text)</li> <li>– Etext</li> </ul>
XML	txml	XSL Stylesheet (HTML XML/Text)
Text	text	<ul style="list-style-type: none"> <li>– XSL Stylesheet (HTML XML/Text)</li> <li>– Etext</li> </ul>

- **SAVE\_OUTPUT** — Specifies whether to save the output documents to the history tables so that you can later view and download the output from the Report Job History page.  
Valid values are "true" (default) and "false". If this property set to "false", the output isn't saved.
- **DEL\_CHANNEL** — The delivery method. Valid values are:
  - EMAIL
  - FAX
  - FILE
  - FTP
  - OBJECTSTORAGE
  - ODCS
  - PRINT
  - WCC
- **TIMEZONE** — The time zone to use for the report. Values must be in the Java format, for example: "America/Los\_Angeles". If time zone isn't provided, then the system default time zone is used to generate the report.
- **CALENDAR** — The calendar to use for the report. Valid values are:
  - GREGORIAN
  - ARABIC\_HIJRAH
  - ENGLISH\_HIJRAH
  - JAPANESE\_IMPERIAL
  - THAI\_BUDDHA

– ROC\_OFFICIAL (Taiwan)

If not provided, the value "GREGORIAN" is used.

- **OUTPUT\_NAME** — The name to assign to the output file in the report job history. The length of the job output file name must be less than 100 characters.
- **Delivery parameters by channel** — The values required for the parameters depend on the delivery method chosen. The parameter values mappings for each method are shown in the following table. Not all delivery channels use all the parameters.

Delivery Channel	PARAMETER Values
Email	PARAMETER1: Email address PARAMETER2: cc PARAMETER3: From PARAMETER4: Subject PARAMETER5: Message body PARAMETER6: Attachment value ("true" or "false"). If your output format is PDF, you must set this parameter to "true" to attach the PDF to the e-mail. PARAMETER7: Reply-To PARAMETER8: Bcc (PARAMETER 9-10 are not used)
Fax	PARAMETER1: Fax Server Name PARAMETER2: Fax number (PARAMETER 3-10 are not used)
File	PARAMETER1: Directory PARAMETER2: File Name (PARAMETER 3-10 are not used)
FTP and SFTP	PARAMETER1: Server Name PARAMETER2: Username PARAMETER3: Password PARAMETER4: Remote Directory PARAMETER5: Remote Filename PARAMETER6: Secure (set this value to "true" to enable Secure FTP) (PARAMETER 7-10 are not used)  If you want to use the FTP delivery settings configured by the administrator, don't enter the username (PARAMETER2) and password (PARAMETER3) values. Only if you want to override the configuration of the FTP server and use password-based authentication, provide the valid username (PARAMETER2) and password (PARAMETER3) credentials for the FTP server.
Object Storage	PARAMETER1: Server Name PARAMETER2: Prefix PARAMETER3: File Name
ODCS (Oracle Content and Experience Cloud)	PARAMETER1: Server Name PARAMETER2: Folder Name PARAMETER3: File Name



Delivery Channel	PARAMETER Values
Printer	<p>PARAMETER1: Printer group</p> <p>PARAMETER2: Printer name or for a printer on CUPS, the printer URI, for example: ipp://myserver.com:631/printers/printer1</p> <p>PARAMETER3: Number of copies</p> <p>PARAMETER4: Sides. Valid values are:</p> <ul style="list-style-type: none"> <li>"d_single_sided" for single-sided</li> <li>"d_double_sided_l" for duplex/long edge</li> <li>"d_double_sided_s" for tumble/short edge</li> </ul> <p>If the parameter isn't specified, single-sided is used.</p> <p>PARAMETER5: Tray. Valid values are:</p> <ul style="list-style-type: none"> <li>"t1" for "Tray 1"</li> <li>"t2" for "Tray 2"</li> <li>"t3" for "Tray 3"</li> </ul> <p>If not specified, the printer default is used.</p> <p>PARAMETER6: Print range. For example "3" prints page 3 only, "2-5" prints pages 2-5, "1,3-5" prints pages 1 and 3-5 (PARAMETER 7-10 are not used)</p>
WCC	<p>PARAMETER1: Server Name</p> <p>PARAMETER2: Security Group</p> <p>PARAMETER3: Author</p> <p>PARAMETER4: Account (Optional)</p> <p>PARAMETER5: Title</p> <p>PARAMETER6: Primary File (or File Name)</p> <p>PARAMETER7: Comments (Optional)</p> <p>PARAMETER8: Content ID (Optional. Content ID must be unique.)</p> <p>PARAMETER9: Custom Metadata. Set value to "on" to turn on custom metadata.</p>

## Pass a Parameter to the Bursting Query

You can pass the value for an element of your bursting XML using a parameter defined in the data model.

For example, if you want to be able to select the template at the time of submission, you can define a parameter in the data model and use the `:parameter_name` syntax in your query. The following example demonstrates this use case of a parameter in a bursting query.

Assume your report definition includes three layouts: layout1, layout2, and layout3. At submission time you want to select the layout (or TEMPLATE, as defined in the bursting query) to use.

To pass a parameter to the bursting query:

1. In your data model, define a list of values with the layout names.

The screenshot shows the 'Data Model' panel on the left with 'List of Layouts' selected under 'List of Values'. The main panel displays the 'List of Values' configuration for 'List of Layouts'.

Name	Type	Data Source	Reorder
List of Layouts	Fixed Data		▲ ▼

Below this, the 'List of Layouts: Type: Fixed Data' table is shown:

Label	Value
Layout 1	layout1
Layout 2	layout2
Layout 3	layout3

2. Create a menu type parameter. Enter P1 as the name and select **List of Layouts** from **List of Values**.
3. In the bursting query, pass the parameter value to the TEMPLATE field using :P1 as shown in the following figure:

The screenshot shows the 'Data Model' panel on the left with 'Burst to File' selected under 'Bursting'. The main panel displays the 'Bursting' configuration for 'Burst to File'.

Name	Type	Data Source	Actions
Burst to File	SQL Query	demo	▲ ▼

Below this, the 'Burst to File' configuration is shown:

Split By: /DATA\_DS/G\_1/DEPARTMEN

Deliver By: /DATA\_DS/G\_1/DEPARTMEN

SQL Query: `select  
d.department_name as "KEY"  
:P1 as TEMPLATE,  
'RTF' as TEMPLATE_FORMAT,  
'en-us' as LOCALE,  
'PDF' as OUTPUT_FORMAT,  
'FILE' as DEL_CHANNEL,  
'C:/Temp' as PARAMETER1,  
d.department_name || '.pdf' as PARAMETER2  
from  
departments d`

Query Builder button is visible.

## Define the Split By and Deliver By Elements for a CLOB/XML Dataset

If the split-by and deliver-by elements required for your bursting definition reside in a dataset retrieved from a CLOB column in a database, Publisher can't parse the XML to list the elements in the **Split By** and **Deliver By** fields in the data model editor.

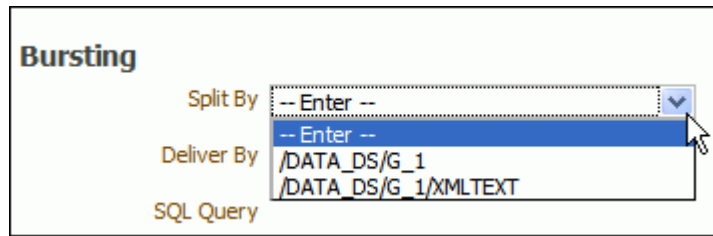
You therefore must manually enter the XPath to locate each element in the retrieved XML dataset. To ensure that you enter the path correctly, use the data model editor's **Get XML Output** feature to view the XML that is generated by the data engine.

For example, the sample XML code, shown in the figure below, was stored in a CLOB column in the database called "XMLTEXT", and extracted as an XML dataset:

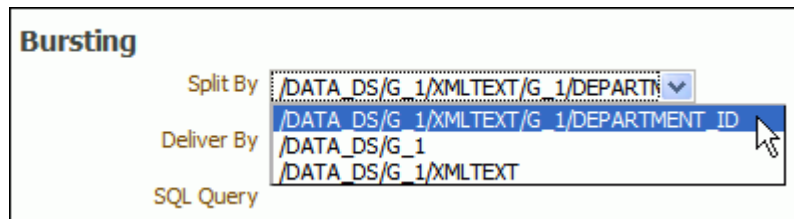
```
<!--Generated by Oracle BI Publisher -->
- <DATA_DS>
  - <G_1>
    - <XMLTEXT>
      - <DATA_DS>
        - <G_1>
          <DEPARTMENT_ID>10</DEPARTMENT_ID>
          <DEPARTMENT_NAME>Administration</DEPARTMENT_NAME>
          <MANAGER_ID>200</MANAGER_ID>
          <LOCATION_ID>1700</LOCATION_ID>
        - <G_2>
          <EMPLOYEE_ID>200</EMPLOYEE_ID>
          <FIRST_NAME>Jennifer</FIRST_NAME>
          <LAST_NAME>Whalen</LAST_NAME>
          <EMAIL>JWHALEN</EMAIL>
          <PHONE_NUMBER>515.123.4444</PHONE_NUMBER>
          <HIRE_DATE>1987-09-17T00:00:00.000-07:00</HIRE_DATE>
          <JOB_ID>AD_ASST</JOB_ID>
          <SALARY>4400</SALARY>
          <MANAGER_ID_1>101</MANAGER_ID_1>
          <DEPARTMENT_ID_1>10</DEPARTMENT_ID_1>
```

For this example, you want to add a bursting definition with split by and deliver by element based on the DEPARTMENT\_ID, which is an element within the CLOB/XML dataset.

When you add the bursting definition, the Split By and Deliver By fields can't parse the structure beneath the XMLTEXT element. Therefore, the field doesn't display the elements available beneath the XMLTEXT node, as shown in the figure below.



To use the DEPARTMENT\_ID element as the Split By element, manually type the XPath into the field as shown in the figure below.



## Configure a Report to Use a Bursting Definition

Although you can define multiple bursting definitions for a single data model, you can enable only one for a report.

To configure a report to use a bursting definition:

1. Enable a report to use a bursting definition on the Report Properties dialog of the report editor.
2. Schedule a job for this report.
3. Choose to use the bursting definition to format and deliver the report.

You can choose not use the bursting definition and choose your own output and destination as a regular scheduled report.

## Sample Bursting Query

This example of a bursting query is based on an invoice report. This report is to be delivered by CUSTOMER\_ID to each customer's individual e-mail address

This example assumes that the delivery and formatting preferences for each customer are contained in a database table named "CUSTOMERS". The CUSTOMERS table includes the following columns that will be retrieved to create the delivery XML dynamically at runtime:

- CST\_TEMPLATE
- CST\_LOCALE
- CST\_FORMAT
- CST\_EMAIL\_ADDRESS

The CUSTOMER\_ID will be used as the KEY and also to define the output file name.

The SQL code to generate the delivery dataset for this example is as follows:

```
select distinct
CUSTOMER_ID as "KEY",
CST_TEMPLATE TEMPLATE,
CST_LOCALE LOCALE,
CST_FORMAT OUTPUT_FORMAT,
CUSTOMER_ID OUTPUT_NAME,
'EMAIL' DEL_CHANNEL,
CST_EMAIL_ADDRESS PARAMETER1,
'accounts.receivable@example.com' PARAMETER2,
'bip-collections@example.com' PARAMETER3,
'Your Invoices' PARAMETER4,
'Hi'||CUST_FIRST_NAME||':|| 'Please find attached your
invoices.' PARAMETER5,
'true' PARAMETER6,
'donotreply@mycompany.com' PARAMETER7
from CUSTOMERS
```

## Create a Table to Use as a Delivery Data Source

If the delivery information isn't easily available in the existing data sources, then you can consider creating a table to use for the query to create the delivery XML.

Following is a sample:

```
CREATE TABLE "XXX"."DELIVERY_CONTROL"
( "KEY" NUMBER,
  "TEMPLATE" VARCHAR2(20 BYTE),
  "LOCALE" VARCHAR2(20 BYTE),
  "OUTPUT_FORMAT" VARCHAR2(20 BYTE),
  "DEL_CHANNEL" VARCHAR2(20 BYTE),
  "PARAMETER1" VARCHAR2(100 BYTE),
  "PARAMETER2" VARCHAR2(100 BYTE),
  "PARAMETER3" VARCHAR2(100 BYTE),
  "PARAMETER4" VARCHAR2(100 BYTE),
  "PARAMETER5" VARCHAR2(100 BYTE),
  "PARAMETER6" VARCHAR2(100 BYTE),
  "PARAMETER7" VARCHAR2(100 BYTE),
  "PARAMETER8" VARCHAR2(100 BYTE),
  "PARAMETER9" VARCHAR2(100 BYTE),
  "PARAMETER10" VARCHAR2(100 BYTE),
  "OUTPUT_NAME" VARCHAR2(100 BYTE),
  "SAVE_OUTPUT" VARCHAR2(4 BYTE),
  "TIMEZONE" VARCHAR2(300 BYTE),
  "CALENDAR" VARCHAR2(300 BYTE)
) PCTFREE 10 PCTUSED 40 INITRANS 1 MAXTRANS 255 NOCOMPRESS LOGGING
STORAGE(INITIAL 65536 NEXT 1048576 MINEXTENTS 1 MAXEXTENTS 2147483645
PCTINCREASE 0 FREELISTS 1 FREELIST GROUPS 1 BUFFER_POOL DEFAULT)
TABLESPACE "EXAMPLES";
```

If the JDBC driver that you use doesn't support column alias, when you define the bursting control table, the columns must match exactly the control XML tag name. For example, the

KEY column must be named *KEY*, upper case is required. PARAMETER1 must be named *PARAMETER1*, not *parameter1* nor *param1*, or any other non-matching name.

Tips for creating a creating bursting delivery table:

- If the split dataset doesn't contain a *DELIVERY\_KEY* value, then the document is neither delivered nor generated. For example, using the preceding example, if customer with ID 123 isn't defined in the bursting delivery table, this customer's document isn't generated.
- To enable a split dataset to generate more than one document or deliver to more than one destination, duplicate the *DELIVERY\_KEY* value and provide different sets of *OUTPUT\_FORMAT*, *DEL\_CHANNEL*, or other parameters. For example, customer with ID 456 wants his document delivered to two e-mail addresses. To achieve this, insert two rows in the table, both with 456 as the *DELIVERY\_KEY* and each with its own e-mail address.

# 8

## Add Custom Metadata for Oracle WebCenter Content Server

This topic describes how to use the data model editor to map fields from your data source to the custom metadata fields. When delivering reports to an Oracle WebCenter Content, Publisher can populate the custom metadata fields defined in your document profiles.

### Topics:

- [About Custom Metadata Mapping](#)
- [Map Data Fields to Custom Metadata Fields](#)
- [Delete Unused Metadata Fields](#)

## About Custom Metadata Mapping

The Custom Metadata component of the data model enables mapping data fields, for example, invoice number or customer name, from your data model to the metadata fields defined in document profile rules configured on your Oracle WebCenter Content Server.

When you run the report and select an Oracle WebCenter Content server as the delivery destination, Publisher generates and stores the document on the content server with the metadata.

## Prerequisites

Certain requirements must be met to use this feature of the data model editor.

### Prerequisites:

- The content server must be configured as a delivery destination with custom metadata enabled.
- To map the custom metadata fields to data fields from your data model dataset, the dataset must be of a type that the data model editor can retrieve the data structure, for example, SQL datasets and Excel datasets are supported; however, web service datasets aren't supported.

## Map Data Fields to Custom Metadata Fields

You can start metadata under a document profile.

To map custom metadata:

1. In the data model editor task pane, click **Custom Metadata**.

**Data Model**

Properties

- Data Sets
- Customer
- Event Triggers
- Flexfields
- List of Values
- Parameters
- Bursting
- Custom Metadata**

Server: WCC\_Server

Content Profile: CustomerInvoice

Rules: CustomerInvoiceRule

**Load Metadata**

**Metadata**

Metadata Field Name	Required	Data Mapping
[This area is currently empty.]		

- Oracle WebCenter Content Server stores metadata under a document profile. A document profile is further nested into rules. To retrieve the metadata fields for mapping, you first select the WebCenter server, then the Content Profile, then the Rules set.

On the Custom Metadata header region, select the Rules as follows:

- Server** — Select the Web content server where the content profile is defined.
- Content Profile** — Select the content profile that includes the rules that define custom metadata fields.
- Rules** — Select the Rules set that specifies the metadata fields.

If you do not select a Rules set, then Publisher loads the metadata for all Rules under the Content Profile.

- Click **Load Metadata**. The lower pane displays the metadata fields defined in the **Rules** you selected.



**Data Model**

Properties

- Data Sets
- Customer
- Event Triggers
- Flexfields
- List of Values
- Parameters
- Bursting
- Custom Metadata
  - xxInvoiceID
  - xxCustomerName
  - xxCustomerID

**Metadata**

Metadata Field Name	Required	Data Mapping
xxInvoiceID	N	/DATA_D
xxCustomerName	N	/DATA_D
xxCustomerID	N	/DATA_D

4. For each metadata field, map a data field from your datasets by selecting it from the **Data Mapping** list. The Data Mapping list displays all the data fields from your datasets. If a metadata field is required a Y is displayed in the **Required** column.

**Data Model**

Properties

- Data Sets
- Customer
- Event Triggers
- Flexfields
- List of Values
- Parameters
- Bursting
- Custom Metadata
  - xxInvoiceID
  - xxCustomerName
  - xxCustomerID

**Metadata**

Metadata Field Name	Required	Data Mapping
xxInvoiceID	N	/DATA_D
xxCustomerName	N	/DATA_D
xxCustomerID	N	/DATA_DS/G_2/CUSTOMER_ID

5. When you are done with mapping the metadata fields, click **Save**.

## Delete Unused Metadata Fields

Publisher loads all the metadata fields defined for the Rules set that you select. You can delete unneeded custom metadata fields.

1. Select the metadata field, either by clicking the field name on the left pane or by clicking the selection column in the table.
2. Click the **Delete** button.

# 9

## Performance Best Practices

This topic provides tips for creating efficient data models for better performance.

### Topics:

- [Know Oracle WebLogic Server Default Time Out Setting](#)
- [Best Practices for SQL Datasets](#)
- [Limit Lists of Values](#)
- [Work with Date Parameters](#)
- [Run Report Online/Offline \(Schedule\)](#)
- [Set Data Model Properties to Prevent Memory Errors](#)
- [Tune SQL Query](#)
- [Validate Data Models](#)

## Know Oracle WebLogic Server Default Time Out Setting

WebLogic Server has a default time out of 600 seconds for each request thread.

When the time exceeds 600 seconds, Oracle WebLogic Server marks the thread as *Stuck*. When the number of Stuck threads reaches 25, the server shuts down.

To avoid this problem, verify that your SQL execution time doesn't exceed the WebLogic Server setting.

## Best Practices for SQL Datasets

Consider the following tips to help you create more efficient SQL datasets:

- [Only Return the Data You Need](#)
- [Use Column Aliases to Shorten XML File Length](#)
- [Avoid Using Group Filters by Enhancing Your Query](#)
- [Avoid PL/SQL Calls in WHERE Clauses](#)
- [Avoid Use of the System Dual Table](#)
- [Avoid PL/SQL Calls at the Element Level](#)
- [Avoid Including Multiple Datasets](#)
- [Avoid Nested Datasets](#)
- [Avoid In-Line Queries as Summary Columns](#)
- [Avoid Excessive Parameter Bind Values](#)
- [Tips for Multi-value Parameters](#)
- [Group Break and Sort Data](#)

## Only Return the Data You Need

Ensure that your query returns only the data you need for your reports. Returning excessive data risks OutOfMemory exceptions.

For example, never simply return all columns as in:

```
SELECT * FROM EMPLOYEES;
```

Always avoid the use of \*.

Two best practices for restricting the data returned are:

- Always select only the columns you need

For example:

```
SELECT DEPARTMENT_ID, DEPARTMENT_NAME FROM EMPLOYEES;
```

- Use a WHERE clause and bind parameters whenever possible to restrict the returned data more precisely.

This example selects only the columns needed and only those that match the value of the parameter:

```
SELECT DEPARTMENT_ID, DEPARTMENT_NAME  
FROM EMPLOYEES  
WHERE DEPARTMENT_ID IN (:P_DEPT_ID)
```

## Use Column Aliases to Shorten XML File Length

The shorter the column name, the smaller the resulting XML file; the smaller the XML file the faster the system parses it.

Shorten your column names using aliases to shorten I/O processing time and enhance report efficiency.

In this example, DEPARTMENT\_ID is shortened to "id" and DEPARTMENT\_NAME is shortened to "name":

```
SELECT DEPARTMENT_ID id, DEPARTMENT_NAME name FROM EMPLOYEES  
WHERE DEPARTMENT_ID IN (:P_DEPT_ID)
```

## Avoid Using Group Filters by Enhancing Your Query

Although the Data Model Group Filter feature enables you to remove records retrieved by your query, this process takes place in the middle tier, which is much less efficient than the database tier.

It's better to remove unneeded records through your query using WHERE clause conditions instead.

## Avoid PL/SQL Calls in WHERE Clauses

PL/SQL function calls in the WHERE clause of the query can result in multiple executions.

These function calls execute for each row found in the database that matches. Moreover, this construction requires PL/SQL to SQL context switching, which is inefficient.

As a best practice, avoid PL/SQL calls in the WHERE clause; instead, join the base tables and add filters.

## Avoid Use of the System Dual Table

The use of the system DUAL table for returning the sysdate or other constants is inefficient. You should avoid using the system DUAL table when not required.

For example, instead of:

```
SELECT DEPARTMENT_ID ID, (SELECT SYSDATE FROM DUAL) TODAYS_DATE FROM DEPARTMENTS
WHERE DEPARTMENT_ID IN (:P_DEPT_ID)
```

Consider:

```
SELECT DEPARTMENT_ID ID, SYSDATE TODAYS_DATE FROM DEPARTMENTS WHERE
DEPARTMENT_ID IN (:P_DEPT_ID)
```

In the first example, DUAL isn't required. You can access SYSDATE directly.

## Avoid PL/SQL Calls at the Element Level

Package function calls at the element, within the group or row level, are not allowed. You can include package function calls at the global element level because these functions are executed only once per data model execution request.

Example:

```
<dataStructure>
  <group name="G_order_short_text" dataType="xsd:string" source="Q_ORDER_ATTACH">
    <element name="order_attach_desc" dataType="xsd:string" value="ORDER_ATTACH_DESC"/>
    <element name="order_attach_pk" dataType="xsd:string" value="ORDER_ATTACH_PK"/>
  </group>
```

The following element is incorrect:

```
<element name="ORDER_TOTAL_FORMAT" dataType="xsd:string" value="
WSH_WSHRDPK_XMLP_PKG.ORDER_TOTAL_FORMAT "/>
<!-- This is wrong should not be called within group.-->
</group>
```

```
<element name="S_BATCH_COUNT" function="sum" dataType="xsd:double"
value="G_mo_number.pick_slip_number"/>
</dataStructure>
```

## Avoid Including Multiple Datasets

It can seem desirable to create one data model with multiple datasets to serve multiple reports, but this practice results in very poor performance.

When a report runs, the data processor executes all datasets irrespective of whether the data is used in the final output.

For better report performance and memory efficiency, consider carefully before using a single data model to support multiple reports.

## Avoid Nested Datasets

The data model provides a mechanism to create parent-child hierarchy by linking elements from one dataset to another.

At run time, the data processor executes the parent query and for each row in the parent executes the child query. When a data model has many nested parent-child relationships slow processing can result.

A better approach to avoid nested datasets is to combine multiple dataset queries into a single query using the WITH clause.

Following are some general tips about when to combine multiple datasets into one dataset:

- When the parent and child have a 1-to-1 relationship; that is, each parent row has exactly one child row, then merge the parent and child datasets into a single query.
- When the parent query has many more rows compared to the child query. For example, an invoice distribution table linked to an invoice table where the distribution table has millions of rows compared to the invoice table. Although the execution of each child query takes less than a second, executing the child query for each distribution can result in STUCK threads.

Example of when to use a WITH clause:

Query Q1:

```
SELECT DEPARTMENT_ID EDID,EMPLOYEE_ID EID,FIRST_NAME FNAME,LAST_NAME  
LNAME,SALARY SAL,COMMISSION_PCT COMMFROM EMPLOYEES
```

Query Q2:

```
SELECT DEPARTMENT_ID DID,DEPARTMENT_NAME DNAME,LOCATION_ID LOCFROM  
DEPARTMENTS
```

Combine the these queries into one using WITH clause as follows:

```
WITH Q1 as (SELECT DEPARTMENT_ID DID,DEPARTMENT_NAME DNAME,LOCATION_ID LOC  
FROM DEPARTMENTS),  
Q2 as (SELECT DEPARTMENT_ID EDID,EMPLOYEE_ID EID,FIRST_NAME FNAME,LAST_NAME  
LNAME,SALARY SAL,COMMISSION_PCT COMM  
FROM EMPLOYEES)  
SELECT Q1.*, Q2.*  
FROM Q1 LEFT JOIN Q2  
ON Q1.DID=Q2.EDID
```

## Avoid In-Line Queries as Summary Columns

In-line queries execute for each column for each row. For example, if a main query has 100 columns, and brings 1000 rows, then each column query executes 1000 times.

Avoid the following use of in-line queries. If this query returns only a few rows this approach may work satisfactorily. However, if the query returns 10000 rows, then each sub or in-line query executes 10000 times, which can result in Stuck threads.

```
SELECT
NATIONAL_IDENTIFIERS,NATIONAL_IDENTIFIER,
PERSON_NUMBER,
PERSON_ID,
STATE_CODE
FROM
(select pprd.person_id,(select REPLACE(national_identifier_number,'-') from per_
national_identifiers pni where pni.person_id = pprd.person_id and rownum<2)
national_identifiers,(select national_identifier_number from per_national
identifiers pni where pni.person_id = pprd.person_id and rownum<2) national_
identifier,(select person_number from per_all_people_f ppf
where ppf.person_id = pprd.person_id
and :p_effective_start_date between ppf.effective_start_date and ppf.effective_
end_date) PERSON_NUMBER
(Select hg.geography_code from hz_geographies hg
where hg.GEOGRAPHY_NAME = paddr.region_2
and hg.geography_type = 'STATE') state_code
```

## Avoid Excessive Parameter Bind Values

Oracle Database allows bind maximum of 1000 values per parameter.

Binding a large number of parameter values is inefficient. Avoid binding more than 100 values to a parameter.

When you create a Menu type parameter and your list of values contains many values, ensure that you enable both the *Multiple Selection* and *Can Select All* options, then also select *NULL* value passed to ensure that too many values are not passed.

### New\_Parameter\_1: Type: Menu

Display Label

List of Values  ▼

Number of Values to Display in Lis

Options ☒ Multiple Selection

☒ Can select all

☒ NULL Value Passed ☐ All Values Passed

☐ Refresh other parameters on change

## Tips for Multi-value Parameters

Report consumers often must run reports that support the certain conditions.

- If no parameter is selected (null), then return all.
- Allow selection of multiple parameter values

In these cases the use of NVL() doesn't work, you should therefore use

- COALESCE() for queries against Oracle Database
- CASE / WHEN for Oracle BI EE (logical) queries

Example:

```
SELECT EMPLOYEE_ID ID, FIRST_NAME FNAME, LAST_NAME LNAME FROM EMPLOYEES
WHERE DEPARTMENT_ID = NVL(:P_DEPT_ID, DEPARTMENT_ID)
```

The preceding query syntax is correct only when the value of P\_DEPT\_ID is a single value or null. This syntax doesn't work when you pass more than a single value.

To support multiple values, use the following syntax:

For Oracle Database:

```
SELECT EMPLOYEE_ID ID, FIRST_NAME FNAME, LAST_NAME LNAME FROM EMPLOYEES
WHERE (DEPARTMENT_ID IN (:P_DEPT_ID) OR COALESCE (:P_DEPT_ID, null) is NULL)
```

For Oracle BI EE data source:

```
(CASE WHEN ('null') in (:P_YEAR) THEN 1 END =1 OR "Time"."Per Name Year" in (:P_YEAR))
```

For Oracle BI EE the parameter data type must be string. Number and date data types are not supported.

## Group Break and Sort Data

The data model provides a feature to group breaks and sort data.

Sorting is supported for parent group break columns only. For example, if a dataset of employees is grouped by department and manager, you can sort the XML data by department. If you know how the data should be sorted in the final report or template, you specify sorting at data generation time to optimize document generation. The column order specified in the SELECT clause must exactly match the element orders in the data structure. Otherwise group break and sort may not work. Due to complexity, multiple grouping with multiple sorts at different group levels isn't allowed.

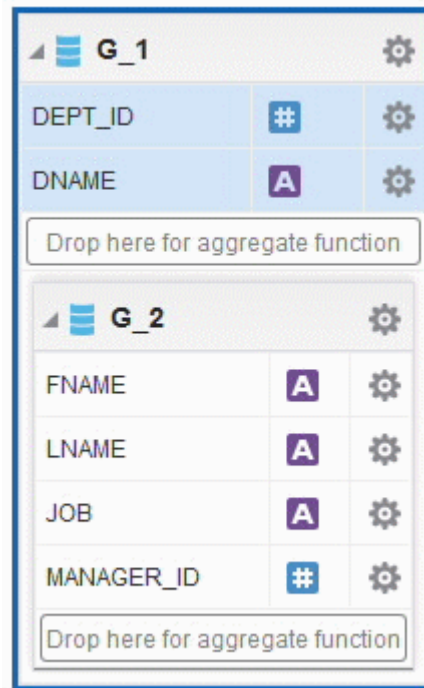
Example: In the example shown below, sort and group break are applied to the parent group only, that is, G\_1. Notice the column order in the query, dataset dialog, and data structure. The SQL column order must exactly match the data structure element field order; otherwise, it may result in data corruption.

Example:

```
SELECT d.DEPARTMENT_ID DEPT_ID, d.DEPARTMENT_NAME DNAME,
       E.FIRST_NAME FNAME, E.LAST_NAME LNAME, E.JOB_ID JOB, E.MANAGER_ID
FROM EMPLOYEES E, DEPARTMENTS D
WHERE D.DEPARTMENT_ID = E.DEPARTMENT_ID
ORDER BY d.DEPARTMENT_ID, d.DEPARTMENT_NAME
```



Once you define the query, you can use the data model designer to select data elements and create group breaks as shown below.



The Data Structure with breaks is:

```
<output rootName="DATA_DS" uniqueRowName="false">
<nodeList name="data-structure"> <dataStructure tagName="DATA_DS">
<group name="G_1" label="G_1" source="q1">
  <element name="DEPT_ID" value="DEPT_ID" label="DEPT_ID" fieldOrder="1"/>
  <element name="DNAME" value="DNAME" label="DNAME" fieldOrder="2"/>
<group name="G_2" label="G_2" source="q1">
  <element name="FNAME" value="FNAME" label="FNAME" fieldOrder="3"/>
  <element name="LNAME" value="LNAME" label="LNAME" fieldOrder="4"/>
  <element name="JOB" value="JOB" label="JOB" fieldOrder="5"/>
  <element name="MANAGER_ID" value="MANAGER_ID" label="MANAGER_ID" fieldOrder="6"/>
</group>
</group>
</dataStructure>
</nodeList>
</output>
```

## Limit Lists of Values

Lists of values based on SQL queries must be limited to 1000 rows.

Adding blind runaway queries in a list of values can cause OutOfMemory exceptions. Consider that the number of rows returned by an LOV is stored in memory, therefore the higher the number of rows the more memory usage.

## Work with Lexicals/Flexfields

Publisher supports lexical parameters for Oracle Fusion Cloud Applications. Lexical parameters enable you to create dynamic queries.

In Publisher, lexical parameters are defined as:

**Lexical** – PL/SQL packaged variable defined as a data model parameter.

**Key Flexfield (KFF)** – Lexical token in a data set query. KFF creates a "code" made up of meaningful segment values and stores a single value as a code combination id. Key Flexfields always return as a single column when used in SELECT / SEGMENT METADATA type or condition when used in WHERE clause. Key Flexfields execute at run time to extract the lexical definition and then are substituted in the SQL query.

**Descriptive Flexfields (DFF)** – Customizable expansion space to track additional information that is important and unique to the business. DFFs can be context sensitive, where the information stored in the application depends on the other values of the user input. Unlike Key Flexfields, Descriptive Flexfields can have multiple context-sensitive segments.

When you define any lexical, name the lexical to match the usage so that when the editor dialog pops up it will be easier to enter the default values for the SQL query. For example, if you are using a lexical in a SELECT clause, use "\_select" as a suffix. The default values must be valid to get metadata.

The following example demonstrates the usage of a lexical:

**Flexfields**

+ X

*Lexical Name	Flexfield Type	Lexical Type	Application Short Name	Flexfield Code	Reorder
KFF_SELECT	Key Flexfield	Select	GL	GL#	▲ ▼

---

**KFF\_SELECT: Type: Select**

Enable Multiple Structure Instance ☒

Code Combination Table Alias

Structure Instance Number

Segments

Show Parent Segments ☒

Output Type

When you create the data set query for the select columns, specify column alias,

```
SELECT gcc.CODE_COMBINATION_ID,
GCC.ATTRIBUTE_CATEGORY,
gcc.segment1 seg1,
gcc.segment2 seg2,
gcc.segment3 seg3,
```

```
gcc.segment4 seg4,
gcc.segment5 seg5,
&KFF_SELECT account
FROM GL_CODE_COMBINATIONS GCC
WHERE gcc.CHART_OF_ACCOUNTS_ID = 101
AND &KFF_WHERE
```

When you save the query, a pop-up dialog prompts you for the default values. To get SQL metadata at design time you must specify the default values that can form a valid SQL query. For example,

- if the lexical usage is a SELECT clause, then specify a null value
- if the lexical usage is a WHERE clause, then specify 1 = 1 or 1 =2 as value
- if the lexical usage is ORDER BY clause, then specify 1 as value
- if the lexical usage is FROM clause, then specify a valid table reference as value
- if the lexical usage is WITH clause, then specify a space as value

## Work with Date Parameters

Publisher always binds date column or date parameter as a timestamp object.

To avoid timestamp conversion, define the parameter as a string and pass the value with formatting as 'MM-DD-YYYY' to match the RDBMS date format.

## Run Report Online/Offline (Schedule)

Running reports in interactive/online mode uses in-memory processing.

Use the following guidelines for deciding when a report is appropriate for running online.

For Online / Interactive mode:

- When report output size is less than 50MB

Browsers do not scale when loading large volumes of data. Loading more than 50MB in the browser will slow down or possibly crash your session.

- Data model SQL Query time out is less than 500 seconds  
Any SQL query execution that takes more than 500 seconds results in Stuck WebLogic Server threads. To avoid this condition, schedule long-running queries. The Scheduler process uses its own JVM threads instead of Weblogic server threads. It's more efficient to schedule reports than run reports online.
- Total number of elements in the data structure is less than 500  
When the data model data structure contains many data elements, the data processor must maintain the element values in memory; which may result in OutOfMemory exceptions. To avoid this condition, schedule these reports. For scheduled reports, the data processor uses temporary file system to store and process data.
- No CLOB or BLOB columns  
Online processing holds the entire CLOB or BLOB columns in memory. You should schedule reports that include CLOB or BLOB columns.

## Set Data Model Properties to Prevent Memory Errors

You can use the data model properties to help prevent memory errors in your system.

You can set the **Query Time Out**, **Enable SQL Pruning**, and **Skip Unused Dataset Query** properties at the data model level.

Only an administrator can set the **Enable Data Model scalable mode** and **DB fetch size** runtime properties for all data models.

To configure the data model properties, see [Data Model Properties](#).

To configure the runtime properties, see Data Model Properties.

### Query Time Out

The Query Time Out property specifies the time limit in seconds within which the database must execute SQL statements for scheduled reports.

The default value of SQL query timeout for scheduled reports is 600 seconds. You specify the time limit on the data model. By increasing the number of seconds, you risk getting stuck threads in the Oracle WebLogic Server. Don't raise the value unless all other optimizations and alternatives have been utilized.

Queries that can't execute in less than 600 seconds aren't well optimized. Ask your DBA or performance expert to analyze and fine-tune the query. Increase the number of seconds only after attempting optimizations of the query.

### Enable SQL Pruning

The SQL pruning property specifies whether to fetch only the columns that are used in the report layout/template.

Set the **Enable SQL Pruning** property to **On** in the Data Model Properties page to enhance performance by allowing the system to fetch only the columns used in the report layout or template. The system won't fetch columns that are defined in the query but not used in the report. This property doesn't alter the WHERE clause but instead wraps the entire SQL query with the columns specified in the layout.

If you enabled SQL pruning, you can use the **Skip Unused Dataset Query** property to skip the execution of unused datasets in a layout.

# DB Fetch Size

The DB Fetch Size runtime property specifies the number of rows of data that are fetched from the database at one time.

An administrator can set the **DB fetch size** runtime property for all data models. A large number reduces the number of calls to the database but consumes more memory for storing more rows of data. Set the **Enable Auto DB fetch size mode** property to true to allow the system to calculate the optimal fetch size at runtime.

# Scalable Mode

The scalable mode property in data model specifies whether to use the temp file system to generate data.

Administrator can set the **Enable Data Model scalable mode** runtime property for all data models.

If you select **Enable Data Model scalable mode**, Publisher uses the temp file system to generate data, and the data processor uses the least amount of memory.

This scalable mode property can be set at the data model level and the instance level. The data model setting overrides the instance value. The instance value can be overridden by Data model setting shown here:

Properties

Description

Default Data Source

BIEE

Oracle DB Default Package

Database Fetch Size

Query Time Out

Scalable Mode

Instance Level

Enable SQL Pruning

On

Enable SQL session trace

Instance Level

SQL Trace Name

The following table details the expected results for the possible on/off settings at each level:

Scalable Mode Instance Value	Scalable Mode Data Model Value	Expected Result
On	Instance	On
Off	Instance	Off

Scalable Mode Instance Value	Scalable Mode Data Model Value	Expected Result
On	On	On
On	Off	Off
Off	On	On
Off	Off	Off

## Tune SQL Query

Query tuning is the most important step to improve performance of any report.

Explain plan, SQL Monitoring, SQL Trace facility with TKPROF are the most basic performance diagnostic tools that can help to tune SQL statements in applications running against the Oracle Database.

You can generate the explain plan for a data set, SQL monitoring reports for a data model, and enable SQL session trace. This functionality is applicable to SQL statements executing against Oracle Database. Logical queries against any other type of database aren't supported. The administrator can enable SQL session trace using the data model runtime property. Users with BI Administrator or BI Data Model Developer privileges can enable and download diagnostics for scheduled jobs.

See [Test Data Models and Generate Sample Data](#).

## Generate Explain Plan

You can generate an Explain plan at the dataset level for a single query or at the report level for all queries in a report.

For more information about interpreting the explain plan, see *Oracle Database SQL Tuning Guide*.

## Explain Plan for a Single Query

From the SQL dataset Edit dialog you can generate an explain plan before actually executing the query. This provides a best guess estimation of a plan. The query will be executed binding with null values.

Click **Generate Explain Plan** on the Edit SQL Query dialog. Open the generated document in a text editor like Notepad or WordPad.

## Explain Plan for Reports

To generate an explain plan for a report, run the report through the Scheduler.

1. From the **New** menu, select **Report Job**.
2. Select the report to schedule then click the **Diagnostics** tab.

You must have BI Administrator or BI Data Model Developer privileges to access the **Diagnostics** tab.

3. Select Enable SQL Explain Plan and Enable Data Engine Diagnostic.

- Enable SQL Explain Plan — Generates a diagnostic log with Explain plan/SQL monitor report information.
  - Enable Data Engine Diagnostic — Generates a data processor log.
  - Enable Report Processor Diagnostic — Generates FO (Formatting Options) and server related log information.
  - Enable Consolidated Job Diagnostic — Generates the entire log, which includes scheduler log, data processor log, FO and server log details.
4. Submit the report.
  5. From the Home page, under **Browse/Manage**, select **Report Job History**.
  6. Select the report to view the details. Under **Output & Delivery** click **Diagnostic Log** to download the explain plan output.

Sample Explain plan:

```
SQLQuery:EXPLAIN PLAN SET STATEMENT_ID = 'dm_plan_Q2_150622_0249' FOR
select /* QUERY_SRC('datamodel: _Users_riyengar_XPLAN_Test1_xdm,dataset:Q2') */ *
from departments
WHERE :DEPARTMENT_ID=DEPARTMENT_ID
SQL Query Timeout: 600
Number of SQL Executionst: 108
PLAN_TABLE_OUTPUT
-----
Plan hash value: 4024094692
-----
```

Id	Operation	Name	Rows	Bytes	Cost (%CPU)	Time
0	SELECT STATEMENT		1	7	1 (0)	00:00:01
1	TABLE ACCESS BY INDEX ROWID	DEPARTMENTS	1	7	1 (0)	00:00:01
* 2	INDEX UNIQUE SCAN	DEPT_ID_PK	1		0 (0)	00:00:01

```
-----
Predicate Information (identified by operation id):
-----
2 - access("DEPARTMENT_ID"=:DEPARTMENT_ID)
```

## Guidelines for Tuning Queries

Tune queries by following a set of guidelines.

- Analyze the explain plan and identify high impact SQL statements.
- Add required filter conditions and remove unwanted joins.
- Avoid and remove FTS (full table scans) on large tables. Note that in some cases, full table scans on small tables are faster and improve query fetch. Ensure that you use caching for small tables.
- Use SQL hints to force use of proper indexes.
- Avoid complex sub-queries and use Global Temporary Tables where necessary.

- Use Oracle SQL Analytical functions for multiple aggregation.
- Avoid too many sub-queries in where clauses if possible. Instead rewrite queries with outer joins.
- Avoid group functions like HAVING and IN / NOT IN where clause conditions.
- Use CASE statements and DECODE functions for complex aggregate functions.

## Tips for Database Tuning

Follow best practices when tuning a database.

- Work with your Database Administrator to gather statistics on the tables.
- If the server is very slow, analyze network / IO / Disk issues and optimize the server parameters.
- In some scenarios when you cannot avoid a large data fetch you may encounter PGA Heap size errors in the database. To resolve these issues, increase PGA heap size as a last resort. Use the following statement to increase heap size:

```
alter session set events '10261 trace name context forever, level 2097152'
```

## Validate Data Models

When you validate data models, the validation messages help you correct data models, optimize queries, reduce stuck threads, and enhance the reporting performance.

After you create or edit a data model that's created in the current or previous releases, if you click **Validate**, Publisher:

1. Checks the queries used for datasets, LOVs, and bursting definitions.
2. Generates the explain plan for SQL queries.
3. Displays a list of error and warning messages.

Take the required action based on the validation message. See My Oracle Support Document ID [2800118.1](#), and the performance recommendation document attached to the MOS note.

Note that if you have upgraded Publisher from a previous release, the existing data models are marked as not validated.

## Data Model Validation Messages

This topic lists the data model validation messages for your reference.

### Message Types

- Error – You must resolve the data model errors if you want to use the data model to run a report.
- Warning – Make the correction suggested in the warning message. Reporting performance might get affected if you choose to run the report ignoring the warning.



## Message Reference

Validation Type	Message Type	Message	Action
Query	Warning	SQL query contains SELECT *. Use of '*' is restricted. Select the specific columns.	Specify the columns in the query.
Query	Warning	Data model contains nested BI JDBC queries. Linking logical queries is restricted. Use OTBI instead of Publisher reports or remove the link between OBIEE datasets.	Use Oracle Transactional Business Intelligence reports instead of Publisher reports or remove the link between the OBIEE datasets.
Query	Warning	SQL query execution plan contains merge cartesian joins. Generate the explain plan for the SQL query and identify the merge cartesian joins. Add the required filters in the SQL query.	Identify the merge cartesian joins in the explain plan for the SQL query. Add the required filters in the SQL query.
Runtime	Warning	Number of bind values per parameter more than the limit of {0} results in poor performance. Reduce the number of bind values.	Reduce the number of bind values per parameter.
Query	Warning	Number of columns in SELECT exceeds the limit of {0}. Select only the required columns and enable pruning. See Publisher Best Practices for SaaS Environments (Doc ID 2145444.1).	Select only the required columns and enable pruning. See Publisher Best Practices for SaaS Environments (Doc ID 2145444.1).
Query	Warning	SQL query contains non-equi joins. Intermediate row spawning can cause performance issues. Replace non-equi joins with equi join or outer join.	Replace the non-equi joins with equi join or outer join.
Query	Warning	Selected column name length exceeds the limit of {0}. Length of the column name must not be more than 15 characters. Use short alias for column names.	Use short alias with less than 15 characters for the column names.
Query	Warning	Number of inline or subquery exceeds the limit of {0}. Remove the additional in-line select queries.	Remove the additional in-line select queries.
Query	Warning	SQL query contains the FROM DUAL clause. SQL query contains too many DUAL tables. Avoid the usage of FROM DUAL clause.	Avoid the usage of FROM DUAL clause.
Query	Warning	Number of LOB columns in SELECT exceeds the limit of {0}. Select only the required columns.	Select only the required columns.
Query	Error	Query contains DDL or DML keywords. Remove the DDL and DML keywords from the SQL query.	Remove the DDL and DML keywords from the SQL query.
Structure	Warning	Number of group breaks on single dataset exceeds the limit of {0}. Remove multiple groups from the dataset.	Remove multiple groups from the dataset.

Validation Type	Message Type	Message	Action
Structure	Warning	Data model contains group filters. Replace the group filters with the WHERE clause in the SQL query.	Replace the group filters with the WHERE clause in the SQL query.
Runtime	Error	Data model property is invalid or contains invalid values. Specify the correct data model property and check the property value.	Specify the correct data model property in the query and check the property value.
Query	Warning	SQL query execution plan contains full table scans. Provide the required filters on indexed columns in the SQL query.	Provide the required filters on indexed columns in the SQL query.
Query	Warning	SQL query execution plan contains high buffer reads. Buffer reads exceed the limit of 1GB. Add filters in the SQL query to reduce the data fetch volume.	Add filters in the SQL query to reduce the data fetch volume.
Query	Warning	SQL query execution plan contains high CPU cycles. Add the required filters in the SQL query to reduce the data fetch volume.	Add the required filters in the SQL query to reduce the data fetch volume.
Query	Warning	SQL query execution plan contains function calls on filter columns. Use of SQL function calls on index columns results in poor performance. Remove function calls on filter columns.	Remove the function calls on the filter columns.
Query	Warning	Detected function calls in the WHERE clause predicates.	Avoid applying SQL or PL/SQL functions to the columns in the filter or join expression.
Query	Warning	Detected calls to PL/SQL functions in the SELECT list; such calls may affect performance significantly.	Avoid using custom PL/SQL functions in the SELECT clauses.
Query	Warning	Scalar subqueries are subqueries in the SELECT list. They must return exactly one value. Using ROWNUM or DISTINCT to restrict the output indicates potential performance problem.	Don't use scalar subqueries with DISTINCT or ROWNUM keyword.
Query	Warning	Too many values in the IN-LIST filter might prevent the optimizer from finding a more efficient plan.	Reduce the number of values in the IN-LIST filter.
Runtime	Warning	A data security predicate (DSP) is wrapped inside a subquery, producing unnecessary nesting. A redundant subquery increases the total parsing time for the query.	Avoid unnecessary nesting of subqueries.
Query	Warning	BI Server has generated too many joins between WITH sub-queries using the unsupported SYS_OP_MAP_NONNULL function. Too many join predicates may cause low cardinality estimates for joins of the respective tables.	Avoid using too many joins between subqueries.

Validation Type	Message Type	Message	Action
Query	Warning	Outer-joined tables were found in the query that do not have any columns in a SELECT list. This may create additional performance overhead during parse and run time as the optimizer may be unable to eliminate unused joins. If VO pruning is happening, check the OTBI code.	Avoid unused OUTER joined tables.
Query	Warning	Scalar subqueries are present in a SELECT list. A factored subquery inside a scalar subquery will cause progressively degraded performance during execution as the inner-most subquery and its outer parent subquery will be executed for every row produced by the embracing query.	Avoid the WITH clause in scalar subquery.
Query	Warning	Tables that are listed in a query and joined to other tables but are never selected from may potentially be redundant. This will decrease performance due to additional join overhead. Check if this table is joined on its Primary Key column to Foreign Key columns of other tables.	Avoid joining tables that aren't used in the query.
Query	Warning	A column was found that is defined as a scalar correlated subquery. If such a column is later used in a filter or join expression it may cause serious performance degradation.	Avoid redundant inline view with scalar subquery in its SELECT list.
Query	Warning	Predicates that use bind variables in a non-trivial way, e.g. (:JCODE IS NULL OR mcd.JCODE LIKE :JCODE), are discouraged. In addition, the use of OR in filter predicates that are selective, whether or not a bind value is passed, is discouraged as there are better methods for handling such cases.	Avoid the use of OR in the filter predicates that are selective.
Query	Warning	A CASE expression that contains more than 10 complex expressions (WHEN ... THEN) is CPU-intensive, especially when used in a WHERE clause.	Avoid too many complex WHEN ... THEN expressions in the CASE expression.
Query	Warning	A column defined in a subquery as a literal constant was later referenced in a join predicate elsewhere in the main query. There are better methods for handling such cases prior to executing the main SQL query.	Avoid joining on columns that are defined as constants (literals).

Validation Type	Message Type	Message	Action
Query	Warning	A subquery was found with more than 10 UNION branches. Each branch of a UNION is executed separately, thus significantly increasing the query's run time. In most cases, a UNION-heavy query can be reworked into a much simpler query by factoring out some 'common denominator' subqueries, and then reusing them as per functional requirements.	Reduce the number of UNION branches in the subquery.
Query	Warning	Remove the unnecessary table reference: the columns from this table can be retrieved from another. When a redundant table is in a query, the database optimizer may not be able to eliminate it during parsing and optimization.	Remove the unnecessary table references.
Structure	Warning	Converting data from CLOB to XML using the XMLTYPE function is slow. Use the data type XMLTYPE for storing XML documents in the database.	Instead of storing data in CLOB and converting to XML, use the XMLTYPE data type for storing the XML documents in the database.
Query	Warning	A FROM clause was found with more than 10 row sources (tables, dictionary views, or inline views). Having too many row sources may cause serious performance degradation for multiple reasons.	Reduce the number of row sources (tables, dictionary views, or inline views) in the FROM clause.
Query	Warning	An inline view is joined to the same FROM clause table elsewhere in the query. This creates redundancy in lookups usage (the same table is used both as a dimension and a lookup).	Make sure the inline view isn't joined to the same FROM clause table anywhere else in the query.
Query	Warning	A lookup table was used as a dimension and joined to itself as a lookup elsewhere in the query. This creates redundancy in lookups usage (the same table is used both as a dimension and a lookup).	Make sure the lookup table isn't joined to the same FROM clause table anywhere else in the query.
Query	Warning	A lookup table is joined to itself being used as a dimension. This creates redundancy in lookups usage (the same table is used both as a dimension and a lookup).	Make sure the lookup table isn't joined to the same FROM clause table anywhere else in the query.
Query	Warning	A subquery was found using columns of a table from the top-most query block. Using a redundant table in a subquery increases the parse and execution times.	Avoid using the same columns of the table in the parent query and in the subquery with WHERE clause.

Validation Type	Message Type	Message	Action
Query	Warning	A SELECT subquery block is redundant because the same conditions (tables and WHERE clause) exist in parent query block. This is a performance problem because correlated scalar subqueries are not mergeable, and they must be executed once for each row produced by the query that contains them.	Avoid using redundant WHERE clause conditions in subquery.
Query	Warning	Identical or almost identical query blocks in SET operations (UNION, INTERSECT, etc.) may cause many expensive and redundant operations	Avoid using identical queries in the UNION and SET operations.
Query	Warning	A missing join in a query can produce a Cartesian product, cause significant performance issues, and can indicate a functional bug. If the missing join is among tables with a large number of rows, the performance result can be disastrous.	Include joins between tables.
Query	Warning	Lack of filters (meaningful WHERE clause conditions to limit the number of rows returned) may cause performance problems depending on the amount of data in the table. Performance will worsen when multiple tables are joined with no filters.	Include filters in the query to limit the rows returned.
Query	Warning	A GROUP BY clause was found with more than 20 columns. A large number of columns in the GROUP BY result set may cause high CPU time to perform the sorting and grouping operations.	Reduce the number of columns in the GROUP BY clause.
Query	Warning	A table was joined but not selected from, while containing at least one join condition to the rest of the query. This potential issue increases the query runtime as the number of joins in the query increases due to the redundant table.	Remove the redundant bridge tables in the query.
Query	Warning	In some cases, the use of SUBSTR functions (SUBSTR, SUBSTRB, SUBSTRC, SUBSTR2, SUBSTR4) can be safely replaced by a LIKE condition to facilitate the use of index access paths.	Replace SUBSTR in the query with LIKE condition.
Query	Warning	This is a potential issue specific to Oracle Business Intelligence "_TL" suffixed tables where the LANGUAGE filter needs to be applied. When the LANGUAGE filter is missing, the table returns more rows than needed.	Include a filter on the Language column in the query.
Query	Warning	A leading wildcard on a LIKE condition will perform poorly as the database will not be able to use an index path.	Avoid using a leading wildcard in the LIKE condition.

Validation Type	Message Type	Message	Action
Query	Warning	Hierarchical queries are slow due to their recursive nature. Such structures can be optimized by materializing the block.	Avoid recursive queries in subqueries.
Query	Warning	This is a potential issue specific to Oracle Fusion views with "_VL" suffixed in the name. The table version of these views performs better.	Avoid outer joins to _VL views.
Query	Warning	ORDER BY operations on columns from multiple physical tables can cause expensive sorts, thereby spiking CPU usage.	Avoid sorting using columns from different tables.
Query	Warning	In most cases, an analytic in-line view performs better than a WHERE block aggregate of the same logic. Convert the WHERE block subquery to an analytic in-line view.	Use analytics in inline view instead of aggregate in the subqueries.
Query	Warning	Removing unused columns, known as SQL column pruning, in a query block will improve performance by eliminating their associated resource needs during the execution process. Pruning can make the SQL more lightweight.	Drop unused columns and redundant attributes from the query.
Query	Warning	When an aggregate function in a scalar subquery is executed, it runs the same function for every row returned in the main query. Each execution is returning the same value each time, over and over again. Such subqueries should be rewritten.	Avoid using aggregate functions in scalar subqueries.
Query	Warning	DECODE statements that are deeply nested can cause incorrect cardinality estimations by the database. Performance can improve by simplifying the DECODE statements or by pre-calculating attributes.	Avoid deep nested decode statements in the query.
Query	Warning	This check identifies an attribute which can act as a reason for a late filter. Filters applied at a late point in the SQL structure can prevent optimal filtering and cause unnecessary processing overhead. Applying filters at lower levels will improve performance.	Apply filter at the initial level of the query.
Query	Warning	Join conditions should be written on the same side in the WHERE clause when several EXIST and IN clauses are used.	Use join conditions on the same side of the WHERE clause when you use many EXIST and IN clauses in the query.
Query	Warning	Certain expressions can be rewritten to help the database optimizer choose a better plan while maintaining the same functionally. If concatenation is in the expression, a database bug may arise. See Sub-optimal CONCATENATION in Execution Plans in Technote 2800118.1 for work-arounds and solutions.	Rewrite expressions to help the database optimizer choose a better plan.

Validation Type	Message Type	Message	Action
Query	Warning	Both OTBI and BIP reports use Fusion View Objects (VOs) that implement user-level security by adding complex semi-joins (EXISTS conditions) to correlated inline views. Very complex structure of security clause may cause optimizer to pick up inefficient join methods. Correlation with external tables may also lead to multiple executions of such security predicates.	Avoid complex EXISTS predicates in subqueries.
Query	Warning	Correlated subqueries are expensive because they are executed once for every row extracted from the external table they are joined to. Aggregation inside correlated subqueries is also expensive as it presumes no or weak filtering.	Avoid scalar subquery with aggregation operations.
Query	Warning	A subquery wrapped inside an IN condition contains aggregation (DISTINCT and/or GROUP BY) or sorting (ORDER BY) operators. Neither of these operators has an effect on the semantics of the IN condition. However they may introduce expensive operations, and noticeably affect performance.	Remove DISTINCT, GROUP BY, or ORDER BY Clauses from the IN_CONDITION in subqueries.
Query	Warning	Nearly identical subqueries in FROM clauses should be avoided as this pattern leads to multiple redundant accesses to base tables, multiple redundant join and filter operations.	Remove repeating instances of subqueries with similar content and structure in the query and subqueries.
Query	Warning	Two tables equi-joined on columns with a low number of distinct values may potentially produce a very large intermediate row source.	Use appropriate filters and conditions in the query to access specific data.
Query	Warning	Filter condition on a table is inefficient and may produce large number of rows.	Use appropriate filters in the query.

# Part II

## Create Pixel-Perfect Reports and Layouts

This part describes how to create pixel-perfect reports and layouts.

### Topics:

- [Introduction to Designing Reports](#)
- [Create and Edit Reports](#)
- [Create Publisher Layout Templates](#)
- [Create RTF Templates](#)
- [Create RTF Templates Using the Template Builder for Word](#)
- [Create Excel Templates](#)
- [Create PDF Templates](#)
- [Create eText Templates](#)
- [Set Report Processing and Output Document Properties](#)



# Introduction to Designing Reports

This topic introduces the components that comprise a pixel-perfect report.

## Topics:

- [Overview for Report Designers](#)
- [About the Layout Types](#)
- [About Setting Run-Time Properties](#)
- [About Translations](#)
- [About Style Templates](#)
- [About Sub Templates](#)

## Overview for Report Designers

A report consists of a data model, a layout, and a set of properties.

Optionally, a report may also include a style template and a set of translations. A report designer performs the following tasks:

- Design the layout for the report. The layout can be created using a variety of tools. The output and design requirements of a particular report determine the best layout design tool. Options include the Layout Editor, which is a Web-based layout design tool and enables interactive output, Microsoft Word, Adobe Acrobat, Microsoft Excel, and Adobe Flexbuilder.
- Set runtime configuration properties for the report.
- Design style templates to enhance a consistent look and feel of reports in your enterprise.
- Create subtemplates to re-use common functionality across multiple templates.
- Enable translations for a report.

## Define Summary Text for Tables

You can define a text summary to describe a table within a report.

To define summary table text:

1. Select a table.
2. On the **Properties** pane, expand **Misc**.
3. In the **Summary** property, enter the table summary text.

## About the Layout Types

You have several options for designing layouts for reports.

The layout type determines the types of output documents supported. The following formats are supported.

- Publisher layout (XPT)  
The Layout Editor is a Web-based design tool for creating layouts. Layouts created with the Layout Editor support interactive viewing as well as the full range of output types supported by RTF layouts.
- Rich Text Format (RTF)  
A plug-in utility for Microsoft Word that automates layout design and enables you to connect to Publisher to access data and upload templates directly from a Microsoft Word session. The RTF format also supports advanced formatting commands providing the most flexible and powerful of the layout options. RTF templates support a variety of output types.
- Portable Document Format (PDF)  
PDF templates are used primarily when you must use a predefined form as a layout for a report (for example, a form provided by a government agency). Because many PDF forms already contain form fields, using the PDF form as a template simply requires mapping data elements to the fields that exist on the form. You can also design PDF templates using Adobe Acrobat Professional. PDF templates support only PDF output.
- Microsoft Excel (XLS)  
Excel templates enable you to map data and define calculations and formatting logic in an Excel workbook. Excel templates support Microsoft Excel (.xls) output only.
- XSL Stylesheet  
Layouts can also be defined directly in XSL formatting language. Specify whether the layout is for Data (CSV), Data (XML), FO Formatted XML, HTML, Text, or XML transformation.
- eText  
These are specialized RTF templates used for creating text output for Electronic Data Interchange (EDI) or Electronic Funds Transfer (EFT) transactions.

See [Create and Edit Reports](#).

## About Setting Run-Time Properties

Publisher provides a variety of user-controlled settings that are specified using an easily accessible Properties dialog. These include security settings for individual PDF reports, HTML output display settings, font mapping, currency formatting, and other output-specific settings.

See [Set Report Processing and Output Document Properties](#). These settings are also configured at the system-level, but can be customized per report.

## About Translations

Publisher provides the ability to create an XLIFF file from RTF templates. XLIFF is the XML Localization Interchange File Format, and is the standard format used by localization providers. Using Publisher's XLIFF generation tool you can generate the standard translation file of an RTF template.

You can then translate this file (or send to a translation provider). Once translated, the file can be uploaded to the report definition under the appropriate locale setting so that at runtime the translated report runs automatically for users who select the corresponding locale.

See [Translation Support Overview and Concepts](#).

## About Style Templates

A style template is an RTF template that contains style information that can be applied to layout templates. The style information in the style template is applied to report layout templates at runtime to achieve a consistent look and feel across your enterprise reports.

See [Create and Implement Style Templates](#).

## About Sub Templates

A Sub Template is a piece of formatting functionality that can be defined once and used multiple times within a single layout template or across multiple layout template files.

This piece of formatting can be in an RTF file format or an XSL file format. RTF subtemplates are easy to design as you can use Microsoft Word native features. XSL subtemplates can be used for complex layout and data requirements.

See [Understand Subtemplates](#).

# Create and Edit Reports

This topic describes how to create and edit pixel-perfect reports.

## Topics:

- [About Report Components](#)
- [Create Reports: Process Overview](#)
- [Create Reports](#)
- [Create Reports Using a Direct Connection to a Subject Area](#)
- [Edit Reports](#)
- [Add Layouts to the Report Definition](#)
- [Configure Layouts Using the List View](#)
- [Configure Parameter Settings for the Report](#)
- [Configure Report Properties](#)
- [Access Reports via a URL](#)

## About Report Components

The first step in creating a new report is to select the source of the data for the report. A Data Model defines data that is used by a report.

A report typically consists of the following components:

- Data Model
- Layout
- Properties
- Translations

A Data Model may contain multiple datasets and it defines how data fields are structured in relation to each other. It may also contain parameters with lists of values, bursting definitions and other structures or properties that determine how data is provided to a report.

Reports that use Oracle Analytics Server Subject Areas as the data source do not require a separate data model. See [Create Reports Using a Direct Connection to a Subject Area](#).

The next step is to design a layout for the report data. The layout defines how the data is presented in the report. A layout consists of a template file and a set of properties for rendering the template file. Publisher supports templates created from a variety of sources including Microsoft Word, Adobe Acrobat, Microsoft Excel, and Publisher's own layout editor. A report can include multiple layouts.

Next, configure the properties for the report. The report properties enable you to control many aspects of the report generation, formatting, and display.

Optionally, add translations for the report. Publisher's translation support enables you to include translations for individual layouts or for all translatable strings in the layout, data model, and the report metadata.

This topic describes the process of creating a report by selecting a data model, adding a layout, and configuring properties using the report editor.

Topic	More Information
Creating a data model	<a href="#">Process Overview for Creating a Data Model</a>
Selecting a layout type	<a href="#">About the Layout Types</a>
Creating specific layout template types	<a href="#">Create Publisher Layout Templates</a> <a href="#">Create RTF Templates</a> <a href="#">Create RTF Templates Using the Template Builder for Word</a> <a href="#">Create Excel Templates</a> <a href="#">Create PDF Templates</a> <a href="#">Create eText Templates</a>
Translating reports	<a href="#">Translation Support Overview and Concepts</a>

## Create Reports: Process Overview

The Create Report process guides you through the steps to create a basic report. After creating the basic report, use the report editor to configure the report and create additional layouts.

The Create Report process guides you through the following steps:

1. Launch the Create Report guide to select a data source, and create a basic report. You can create a simple layout using the guide or add the layout later.
2. Edit the simple report layout that you created using the Create Report guide, or create a new layout.
3. Configure the properties for the layout.
4. Configure parameters for the report.
5. Configure report properties.
6. Add translations for the layouts. Complete this step if the report requires support for multiple languages.

## Create Reports

Use the Create Report guide to create reports.

If your user interface preference is set to a bidirectional language, the Create Report guide doesn't display all components in right-to-left orientation.

To create a report:

1. Launch the Create Report guide in one of these ways.
  - From the global header, click **New**, and then click **Report**.

- From the Home page, under the **Create** region, click **Report**.
  - On the catalog toolbar, click **New**, and then click **Report**.
  - From the Data Model editor page, click **Create Report**.
2. Follow the guided steps to select data and layout for the report, and if required add charts and tables.
  3. Save the report.

## Select a Data Source

Building a report begins with selecting a data source.

Choose one of the following options to begin building your report:

- **Use Data Model**  
Select an existing data model from the catalog.  
Click **Next** to proceed to choose **Guide Me** or **Use Report Editor**.
- **Upload Spreadsheet**  
Upload a Microsoft Excel file (file type.xls or .xlsx). If the uploaded spreadsheet contains multiple sheets, select the sheet to use as the data source. You can include data from only one sheet.  
To use multiple sheets in a workbook, you first create a data model that includes each spreadsheet as a dataset, and then use that data model as the data source for the report.  
Click **Next** to proceed to choose **Guide Me** or **Use Report Editor**.
- **Use Subject Area**  
Select a subject area from the semantic model. This option enables you to directly query the server and eliminates the need to create a data model in Publisher. The Create Report guide limits you to one subject area, however, you can create a report against multiple subject areas using the report editor.  
Click **Next** to proceed to choose **Guide Me** or **Use Report Editor**.

## Choose Guide Me or Use Report Editor

You can either choose guide or to use the report editor on the Create Report page.

The following table describes the options on the Create Report page.

Option	Description
Guide Me	<p>This option guides you through defining the layout of your data in common predefined report styles. Choose this option to:</p> <ul style="list-style-type: none"><li>• Create a report with simple components</li><li>• Select a common report style with basic options</li><li>• Quickly view the data in preview mode</li></ul> <p>Proceed to select the report layout.</p>
Use Report Editor	<p>This option prompts you to save the report and then opens the report editor. Choose this option to proceed to configure the report or to create a more complex layout.</p>

## Select the Report Layout

When you choose Guide Me, you are prompted to select the report page options.

After you select the data source for the report, select the report page options and report layout to define how data is displayed in the report.

To select report layout:

1. Select report page options as follows:
  - Select the **Portrait** or **Landscape** page option to define the report page orientation.
  - Select the **Page Header** option to include the date in the report page header.
  - Select the **Page Footer** option to include the page number in the report page footer.
2. Select one of the following report layouts:
  - Table (default)
  - Chart
  - Pivot Table
  - Chart and Table
  - Chart and Pivot Table
  - Two Charts and Table
3. Click **Next** to proceed.

## Choose Columns for Report Layouts

The layout that you select on the Select Layout page drives the remaining pages that you must complete to create the report.

For example, if you select the Table layout, Create Table is the next page displayed.

After you select a layout, select the data source columns to include in the report. As you select columns, sample data for the columns displays on the page. The selected columns display in the order selected.

Keep the following points in mind about sample data:

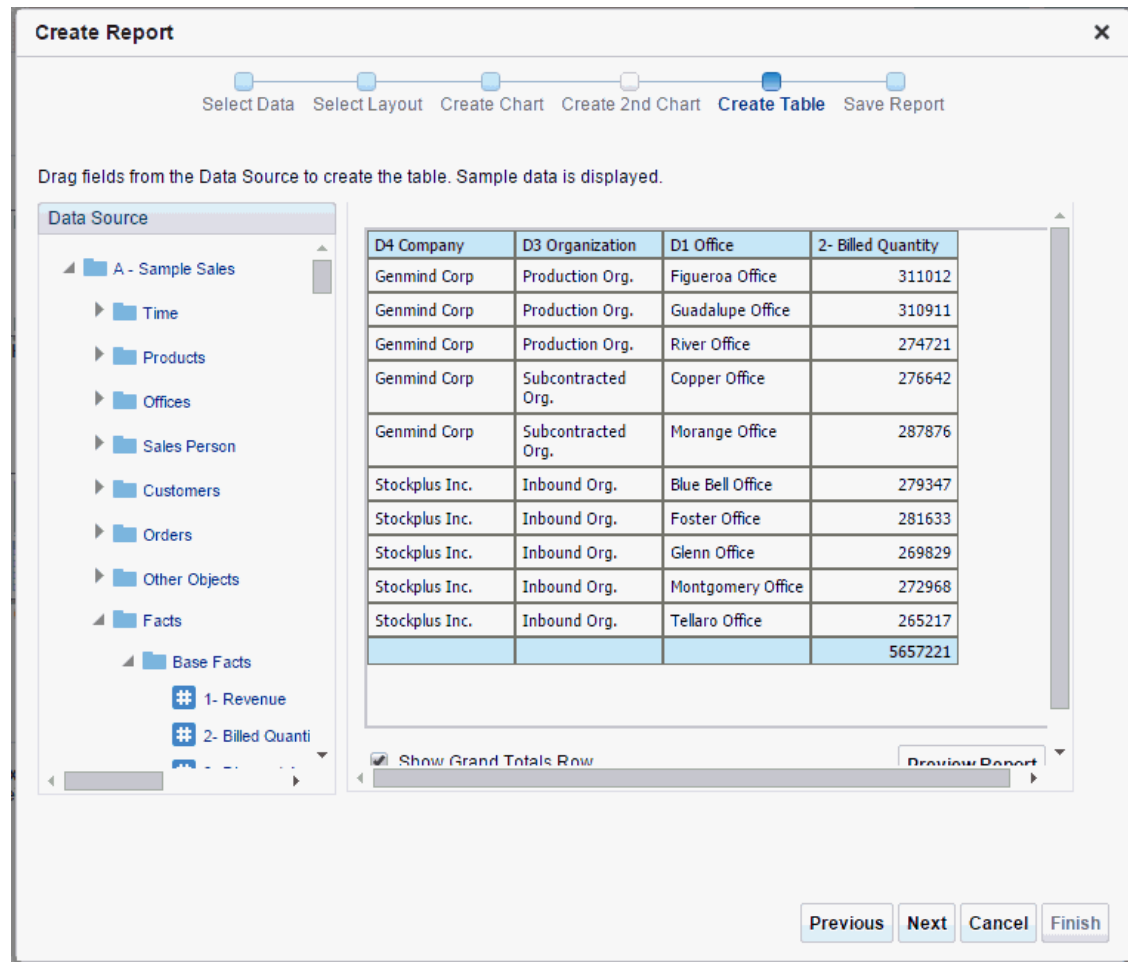
- For data models: The Create Report process uses the sample data that is saved to the data model. If sample data isn't attached to the data model, the selected column headings display without data.
- For uploaded spreadsheets: Sample data is displayed from the selected spreadsheet.
- For subject areas: Sample data is displayed directly from the columns in the subject area.

## Table Layout

On the **Create Table** page you add columns to the layout by dragging and dropping them from the Data Source pane to the table area.

The columns are displayed in a simple tabular format and the column widths are automatically adjusted based on the number of selected columns as shown in the following illustration.

To remove a column from the table, hover your mouse over the upper-right hand corner of the column header and click **Delete**.



The **Show Grand Totals Row** option is selected by default to automatically display an aggregated summary row for all columns. Deselect this option to remove the row from the table.

Click **Preview Report** to display the report in the report viewer.

Click **Next** to proceed to save the report.

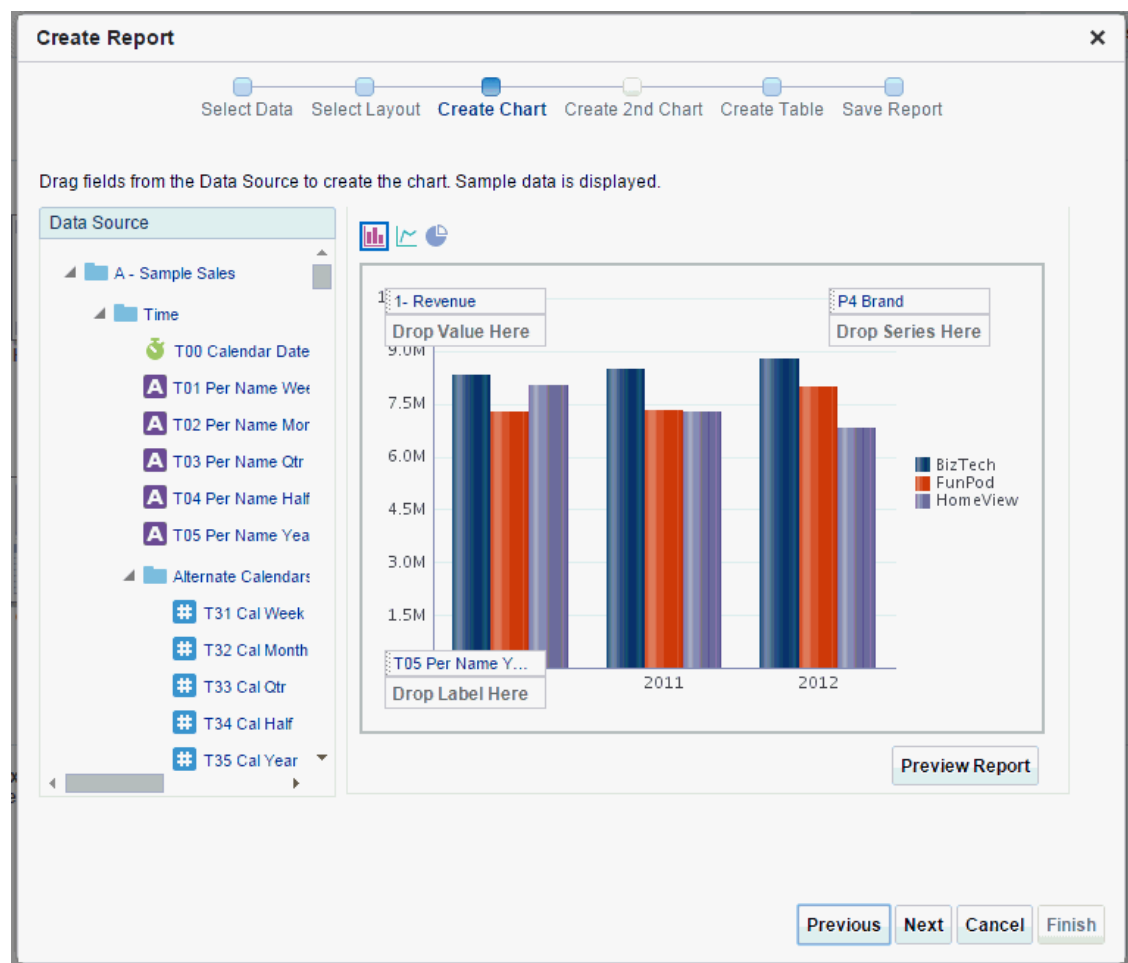
## Chart Layout

The Chart Layout page supports three types of charts. Choose the chart type by clicking its icon: Bar, Line, or Pie. Add columns to the chart by dragging and dropping them from the **Data Source** pane to the chart area.

The following figure shows the create chart layout. You can specify two values each to display for the chart Value, Series, and Label.

The layout editor supports a variety of more complex charts. To add more values to this chart or create another chart type, edit this layout in the layout editor after saving the report.





To remove a value from the chart, hover your mouse over the upper-right hand corner of the item label and click **Delete**.

Click **Preview Report** to display the report in the report viewer.

Click **Next** to proceed to save the report.

## Chart and Table Layout

When you select the chart and table layout, you add columns to the Create Chart page first, click **Next**, and then the Create Table page displays with the columns that you previously selected for the chart.

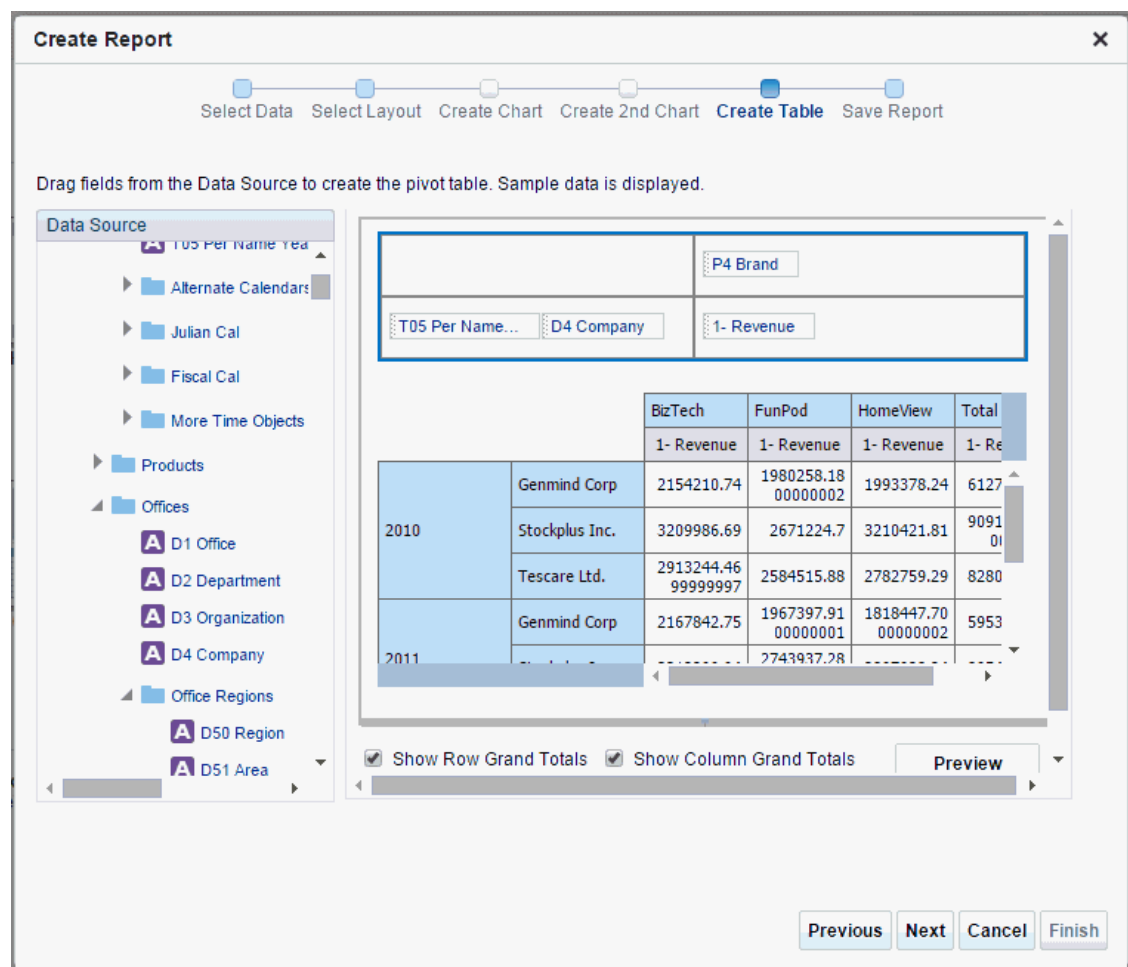
You can also add additional columns and remove columns on this page.

Click **Next** to proceed to save the report.

## Pivot Table Layout

When you select columns for the pivot table layout, the columns display on the Create Table page.

The figure below shows the columns displayed.



The **Show Row Grand Totals** option is selected by default. Deselect this option to hide the row in the table that includes the grand total for each column.

The **Show Column Grand Totals** option is selected by default. Deselect this option to hide the column in the table that includes the grand total for each row.

Click **Switch Rows and Columns** to flip the rows and columns axes.

Click **Preview Report** to display the report in the report viewer.

Click **Next** to proceed to save the report.

## Chart and Pivot Table Layout

When you select the chart and pivot table layout, you add columns to the Create Chart page first, click **Next**, and then the Create Table page displays with the columns that you previously selected for the chart. You can also add additional columns and remove columns on this page.

Click **Next** to proceed to save the report.

## Two Charts and Table Layout

When you select the two charts and table layout, you add columns to the Create Chart page first, click **Next**, and then **Create 2nd Chart**.

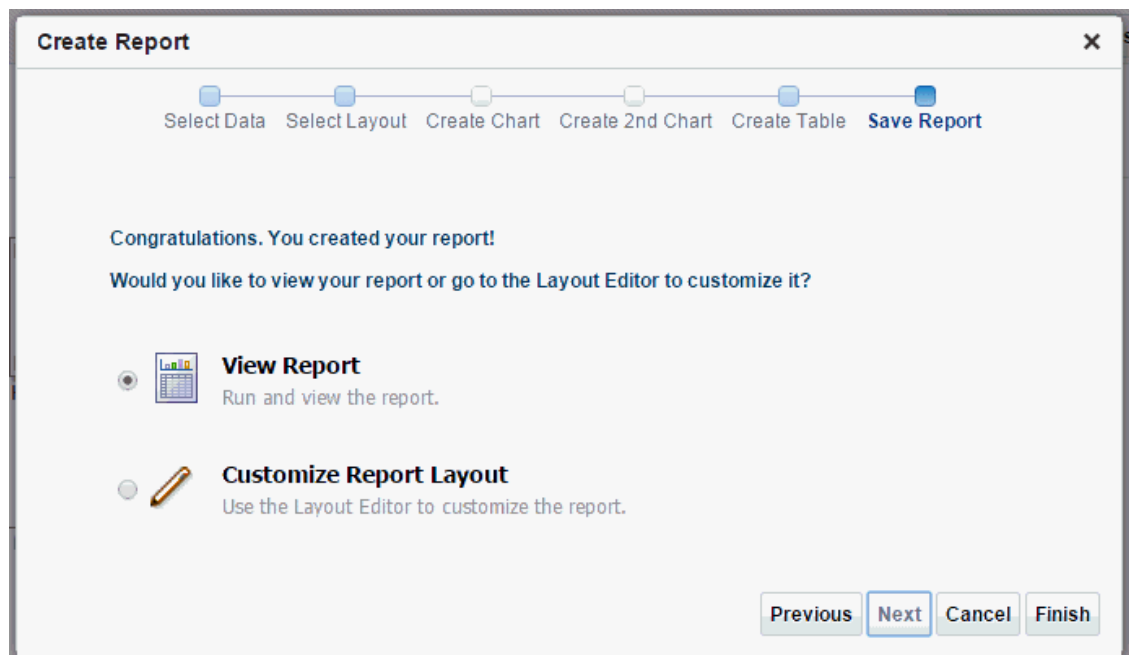
Once you add columns to the Create 2nd Chart page, click **Next** to display the Create Table page. The Create Table page displays with the columns that you already selected for the first chart. You can also add additional columns and remove columns on this page.

Click **Next** to proceed to save the report.

## Save the Report

You can save the report layout and the columns you added.

Use the Save Report page as shown in the following illustration.



Select one of the following options:

- To run the report you just created, click **View Report** and then click **Finish**. The final page prompts you to save the report. After saving, Publisher runs and displays the report in the report viewer.
- To customize the report layout, click **Customize Report Layout** and then click **Finish**. The final page prompts you to save the report. After saving, the report opens in the layout editor.

## Create Reports Using a Direct Connection to a Subject Area

Subject area reports contain queries that are issued directly to Oracle BI Server, therefore the report doesn't use a Publisher data model.

When you run a report that uses a subject area as a data source, the Oracle BI Server optimizes and determines how many queries are actually issued to the database based on the columns selected for the report.

Keep the following points in mind when creating a subject area report:

- You must use the Create Report guide to create subject area reports.
- No data model is created for a subject area report. Publisher executes the subject area queries as defined in Oracle Analytics Server to retrieve the report data.
- In the Create Report guide, you can only select one subject area for a report. To create a report that uses multiple subject areas, first create a report against a single subject area using the Create Report guide and then edit the report in the report editor to add subject areas. See [Create a Report Against Multiple Subject Areas](#).
- For reports that use a subject area, Publisher calculates subtotals and totals based on the data received from the BI Server, which is already summarized. As Publisher isn't performing the summary calculations, certain functions that require access to the original column data, such as count distinct and average, may deliver different results in Publisher.
- Hierarchical columns that are available in Oracle Analytics Server are not available for use in subject area reports in Publisher.
- Be aware that if you link multiple fields from unrelated subject areas in a single report component such as a graph, table, or pivot table, the rendering of the component may fail because the data cannot be correlated correctly.
- If you want to generate a CSV output for the subject area, specify the subject area (analysis) as a data source in the data model.

## Create Subject Area Reports

You can create a subject area report by launching the create report guide.

**To create a subject area report:**

1. Launch the Create Report guide.
2. Select a subject area. Only one subject area can be selected.

To report against multiple subject areas, after selecting the first subject area, select the **Use Report Editor** option, and click **Finish** to save the report. Then, use the report editor to add the additional subject areas.

3. Follow the prompts to create your report layout as described in [Choose Columns for Report Layouts](#).

## Add Parameters to Subject Area Reports

Parameters are usually defined in the data model for Publisher reports. Reports that run directly against a subject area do not use a data model, therefore, you must use the report editor to set up parameter definitions for subject area reports.

If you intend to use a subject area report in an Oracle Analytics Server dashboard and you need to use parameters.

**Add parameters to subject area reports**

1. Create and save the report as described in [Create Subject Area Reports](#).

- In report editor, click **Parameters** to launch the Edit Parameters dialog as shown in the following figure.

**Parameter**

**Display Options**

Parameter Location: Horizontal Region

Parameter Label Location: Place label on side

Show Apply Button: True

**Parameters**

Show	Name	Display	Multiple	Label	Default Value	Row Placement	Edit
<input checked="" type="checkbox"/>	P3 LOB	Checkboxes	True	Line of Business	All	1	
<input checked="" type="checkbox"/>	D4 Company	Choice List	False	Company	Genmind Corp	1	

OK Cancel

- Click **Add** to launch the Select a Column to Define Parameter dialog as shown in the following figure.

**Select A Column to Define Parameter**

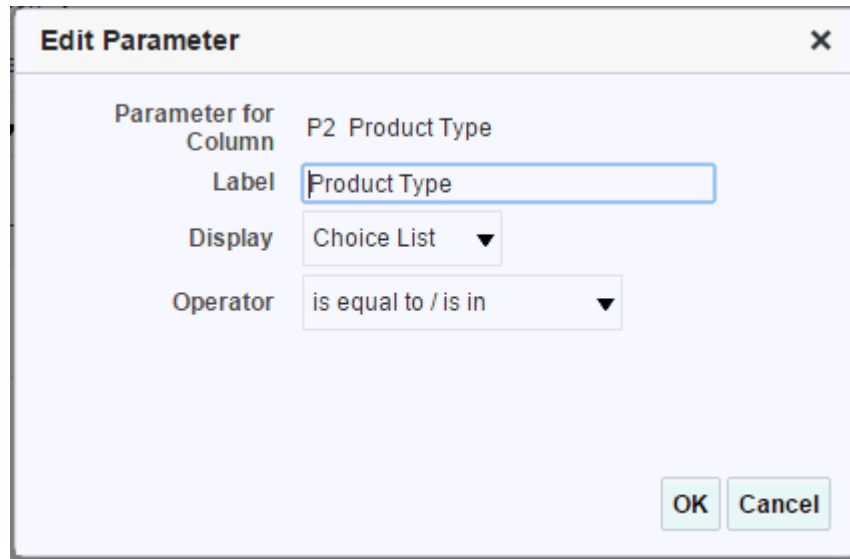
**Columns**

- A - Sample Sales
  - Time
  - Products
    - P1 Product
    - P2 Product Type**
    - P3 LOB
    - P4 Brand
    - P0 Product Number
    - P5 Product Color
    - P6 Product Size
  - Product Ragged Skipped Lvl

OK Cancel

4. Select a parameter column and click **OK** to launch the Edit Parameter dialog as shown in the following figure.

The options displayed for selection in the Edit Parameter dialog are driven by the parameter column data type.



5. Enter the parameter label to be displayed in the report.
6. Select a parameter display option:
  - **Calendar** - Provides users with a field into which they can enter a specific date, as well as a calendar pop-up to select a date. This display option is only available for selection if the parameter has a date column type.
  - **Choice List** - Provides users with a collapsed list of all prompt values. This display option is useful for a long list of values where you want to provide the user with the ability to search for a specific value.
  - **Checkboxes** - Provides users with a visible list of all prompt values where a small, selectable box displays before each value item. This display option is suitable for a prompt that contains a smaller set of data.
  - **Radio Buttons** - Provides users with a visible list of all prompt values where a radio button is displayed before each prompt value. This display option is useful for short lists of values where the user is to select only one prompt value.
  - **Text** - Provides users with a field into which they can enter a specific prompt value. This display option cannot be used for multiple prompt values. Only the field and the field label are displayed for this option.
7. Select the parameter operator. The default value is set to **is equal to/is in**.
8. Click **OK**.

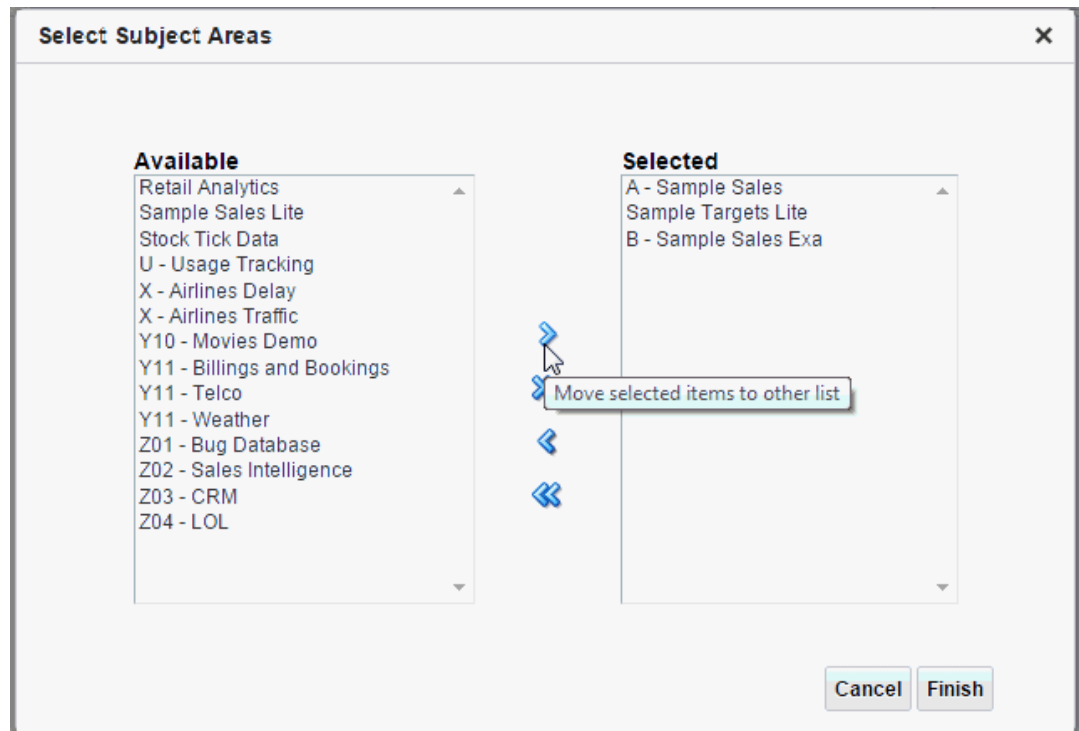
## Create a Report Against Multiple Subject Areas

You can use the report editor to link a report to multiple subject areas.

### To add multiple subject areas to a report:

1. Use the report editor to open the report. The upper left corner displays the subjects areas already linked to the report.

2. Click **Edit Subject Areas** to launch the Select Subject Areas dialog as shown in the following figure:

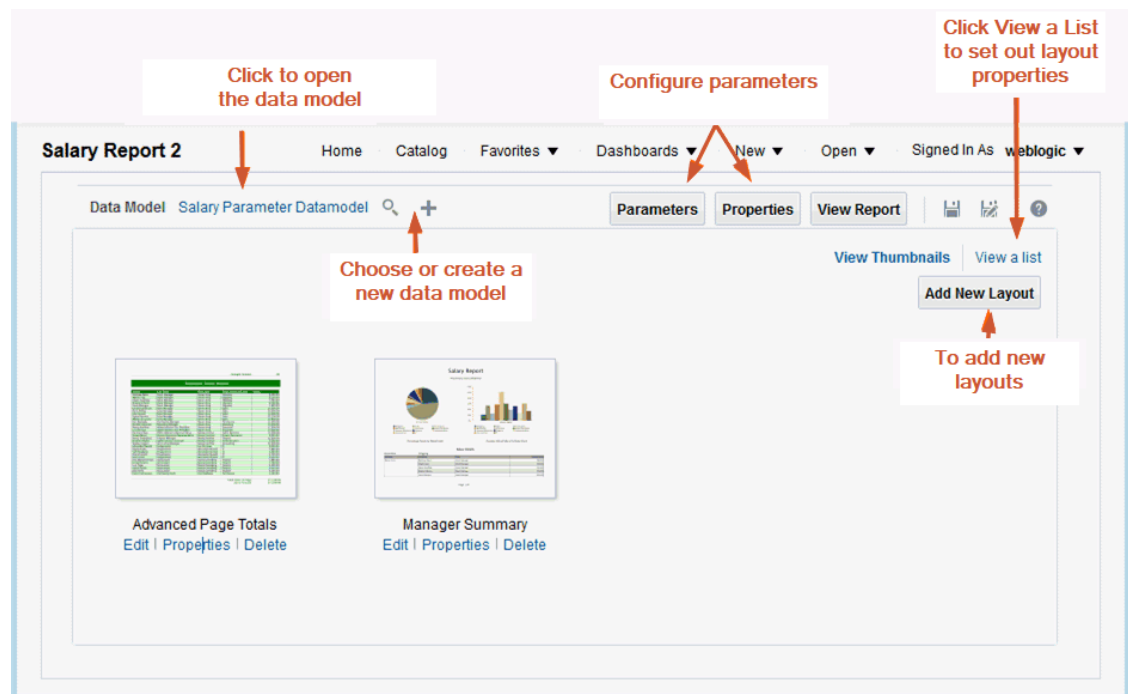


3. From the **Available** pane, select one or more subject areas.
4. Click **Add** to move the subject area(s) to the **Selected** pane.
5. Click **Finish**.

## Edit Reports

Navigate to the report editor through the Create Report process flow or by clicking a report's **Edit** link in the catalog.

The report editor is shown in the following figure:



Use the report editor to:

- Add layouts
- Configure layouts
- Configure the parameters for this report
- Configure the report properties
- Update the data model associated with the report

This procedure addresses these options in the order listed.

## Add Layouts to the Report Definition

You can add a layout to a report in three different ways:

- **Create Layout** - Select one of the basic or shared templates to launch the Layout Editor.
  - **Upload Layout** - Upload a template file layout that you have designed in one of the supported file types.
  - **Generate Layout** - Automatically generate a simple RTF layout.
1. Navigate to the report editor through the Create Report process flow or by clicking a report's **Edit** link in the catalog.
  2. Click **Add New Layout**.

If you want to update the template of a report, you can upload a new template of the same type. For example, to update an RTF template of report, edit the report and upload the new RTF template. However, you can't upload an XSL template to replace the RTF template.

## Add a Layout Using the Layout Editor

Follow these steps to add a layout using the Layout Editor.



1. Under the **Create Layout** region, click one of the basic or shared templates to launch the Layout Editor. The shared templates are preformatted layouts with common report components already inserted.
2. Design the template.
3. When finished, click **Save**. In the Save Template dialog enter a name for this layout and select a locale. Click **Save**.
4. Click **Return** to return to the Report Editor.
5. Configure the settings for the layout.

## Add a Layout by Uploading a Template File

Uploading a template file assumes that you've already created a template file.

**To add a layout by uploading a template file:**

1. Under the **Upload or Generate Layout** region, click the **Upload** icon.
2. In the Upload dialog, perform the following:
  - Enter a **Layout Name**.
  - Click **Browse** to locate the **Template File** in the local file system.
  - Select the **Template Type** from the list.
  - Select the **Template Locale** from the list.
  - Click **Upload**.

If you are connected to Publisher through the Template Builder, then you can upload the layout file directly from the client tool.

## Add a Layout by Generating a Template File

Follow these steps to add a layout by generating a template file.

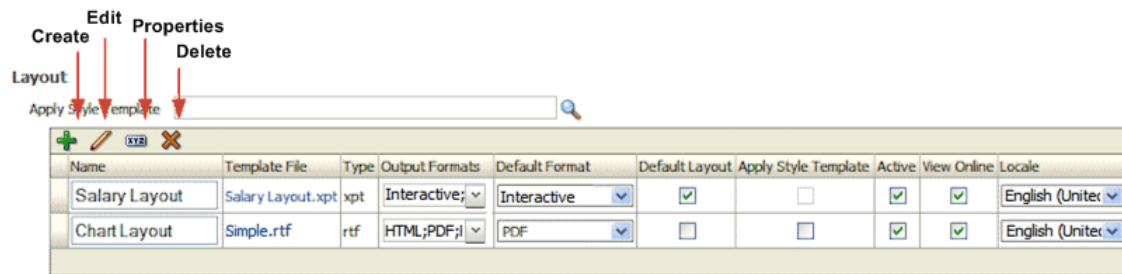
1. Under the Upload or Generate Layout region, click the Generate icon.
2. In the Autogenerate Layout dialog, perform the following:
  - Enter a **Template Name** for the layout.
  - Click **Generate**.

The autogenerate feature creates a simple table-based RTF layout that includes all the fields in the data model. The feature can only be used with datasets for which metadata is available. Therefore, this feature can't be used with datasets generated from stored XML files, HTTP feeds, web services, or migrated data templates.

## Configure Layouts Using the List View

After creating or uploading the layouts for the report, you can configure settings for the layout from the **List View**.

The following figure shows the **List View**.



## Apply a Style Template to the Layout

A style template contains style definitions that are applied to the paragraphs, headings, tables, and headers and footers of a report. A style template is optional and can only be applied to an RTF template file.

1. Click **Choose** to browse for and select the style template.
2. To apply the style template to an individual layout in the list, select the **Apply Style Template** box for that layout in the list of properties.

## About the Layouts Toolbar

The table explains the actions that you can do with the layout toolbar buttons.

The Layout toolbar buttons are described in the following table.

Toolbar Button	Description
<b>Create</b>	Launches the add layout page to upload or create a new layout.
<b>Edit</b>	Launches the Layout Editor for the selected layout. This button is enabled for Publisher layouts (.xpt) only.
<b>Properties</b>	Launches the Properties page to enable the upload of localized templates and XLIFF files to associate with this layout. This button is enabled for RTF (.rtf) and Publisher layouts (.xpt) only.
<b>Delete</b>	Deletes the selected layout.

## Configure the Layout Settings Using the List View

Configure these layout settings using **List View**.

The settings are described in the following table:

Setting	Description
<b>Name</b>	Place the cursor in the text box to enter a new name for the layout.
<b>Template File</b>	Displays the name of the file that was saved to the report definition. Click the template file name to download it.
<b>Type</b>	Displays the template file type.
<b>Output Formats</b>	Select the output types to be enabled for this layout. By default, all valid output types for a layout are enabled. The layout type determines the output types available. See <a href="#">Select Output Formats</a> for the complete list.

Setting	Description
<b>Default Format</b>	Select the default output format for this layout when viewed or scheduled.
<b>Default Layout</b>	Select the layout that this report uses by default when viewed online or scheduled. Only one box in this column can be checked.
<b>Apply Style Template</b>	Select this box to apply the style template to this layout. Note that a style template can only be applied to RTF template files. See <a href="#">Apply a Style Template to the Layout</a> .
<b>Active</b>	By default a layout is active. Clear this box when you want to keep the layout as part of the report definition, but no longer make it available. When a layout is inactive it doesn't display in the report viewer or the scheduler.
<b>View Online</b>	By default, a layout is available for report consumers who open the report in the Report Viewer. If this layout is for scheduled reports only, clear this box.
<b>Locale</b> (Read-only)	Displays the locale selected when the layout was uploaded.

## Select Output Formats

You can use a wide range of output formats.

Different layout types support different output types. The following table lists all possible output types.

Output Format	Description
Data (CSV)	Enable this option to generate comma separated value output.
Data (XML)	Enable this option to generate XML output.
Excel (*.xlsx)	<p>Enable this option to generate the report in Excel.xlsx (Excel XML format). If your report consumers have Excel 2007 or later installed, this option provides the best preservation of layout and formatting.</p> <p>For this output format, Publisher doesn't apply any formatting for number and date. Publisher saves the formatting mask and the actual value (date or number) into the XLSX output file. The formatting is handled by Microsoft Excel. For example:</p> <ul style="list-style-type: none"> <li>• If the Microsoft Windows Region and Language of the client computer is set to English (United States), then the numbers and dates are formatted in en-US locale in the Excel 2007 output file.</li> <li>• If the Microsoft Windows Region and Language of the client computer is set to French (France), then the numbers and dates in the same Excel 2007 output file are formatted in fr-FR locale.</li> </ul>
FO Formatted XML	This option generates a XSL-FO (Extensible Stylesheet Language Formatting Objects) file. This output type is useful for debugging templates.
HTML	Enable HTML output for reports that require browser viewing.
Interactive	This output is only available for layouts designed using Publisher's Layout Editor. Interactive output enables pop-up chart value displays, scrollable and filterable tables, and other interactive features for a report.
MHTML	Enable Mime Hyper Text Markup Language to allow the report consumer to save a Web page and its resources as a single MHTML file (.mht), in which all images and linked files are saved as a single entity. A report consumer would use this option to send or save HTML output and retain the embedded images and stylesheet formatting.

Output Format	Description
PDF	Portable Document Format is commonly required for reports that require printing or sharing.
PDF/A	Use for reports that require long-term preservation or archiving. PDF/A is a specialized subset of the PDF standard that prohibits elements that may interfere with the preservation of the file as a self-contained document.
PDF/X	Use for reports that require formatting for prepress graphics exchange. PDF/X is a specialized subset of the PDF standard that streamlines documents for high-quality print production output and restricts content that doesn't serve the print production, such as signatures, comments, and embedded multimedia.
PowerPoint (mhtml)	Enable this output type to generate a PowerPoint file compatible with Microsoft PowerPoint 2003. Note that Microsoft PowerPoint 2010 doesn't support this output type. Choose PowerPoint (*.pptx) instead.
PowerPoint (*.pptx)	Enable this output type to generate a Microsoft PowerPoint file in Microsoft Office Open XML format. This output type is supported for versions of Microsoft PowerPoint 2007 and later.
RTF	Rich Text Format. Enable this output for reports that must be opened for editing.
Text	This option generates text output for eText templates. Text output is available only for eText templates.
Word	Generates Microsoft Word .docx file.
Zipped PDFs	Publisher can generate a zip file containing the report PDF output and index files. This option is only available for layouts that have been designed to enable zipped PDF output. For information on designing a report to generate zipped PDF.

The following table lists valid output formats for each layout type.

Layout Type	Valid Output Types
Publisher template created using the layout editor (XPT)	Data (CSV), Data (XML), FO Formatted XML, HTML, Interactive, MHTML, PDF, PDF/A, PDF/X, PowerPoint (*.pptx), RTF, Word, Zipped PDFs Excel (html), Excel (mhtml), PowerPoint (mhtml)
RTF template (RTF)	Data (CSV), Data (XML), Excel (*.xlsx), FO Formatted XML, HTML, MHTML, PDF, PDF/A, PDF/X, PowerPoint (*.pptx), RTF, Word, Zipped PDFs Excel (html), Excel (mhtml), PowerPoint (mhtml)
PDF template (PDF)	Data (CSV), Data (XML), PDF, Zipped PDFs
Excel template (XLS)	Data (CSV), Data (XML), Excel (*.xls)
XSL Stylesheet (FO) (XSL)	Same outputs as RTF template
XSL Stylesheet (HTML XML/Text) (XSL)	Data (CSV), Data (XML), HTML, Text
eText template (RTF)	Data (CSV), Data (XML), Text
Analyzer template (XPA)	(Supported for backward compatibility only.) Analyzer templates can be uploaded from previous versions of Publisher. The Online Analyzer in current versions exports the online analysis to layout editor templates (.xpt).

Data (CSV) and Data (XML) output formats are available for all layout types. However, when you select either of these formats, no layout formatting is applied and only data is included in the output.

## Edit a Layout

Follow these steps to edit a Publisher layout and other template types.

To edit a Publisher layout (.xpt file type):

- Select the report from the list and click **Edit**.

To edit any other template type:

- Click the File name link to download the layout to a local computer for editing.

## Configure Parameter Settings for the Report

Parameters are defined in the data model. The report editor enables you to configure the parameter settings specifically for each report that uses the data model.

1. On the Report Editor page, click **Parameters**. The Parameters dialog is displayed as shown in the following figure:

**Parameters**

**Display Options**

Parameter Location: Vertical Region ▼

Parameter Label Location: Place label on top ▼

Show Apply Button: False ▼

Show	Name	Type	Multiple	Display Label	Default Value	Row Placement
<input checked="" type="checkbox"/>	P_YEAR	Radio Butto ▼	False	Calendar Year	Default ▼	1 ▼
<input checked="" type="checkbox"/>	P_COMPANY	Radio Butto ▼	False	Company Name	Default ▼	1 ▼
<input checked="" type="checkbox"/>	P_ORG	Radio Butto ▼	False	Organization Name	Default ▼	1 ▼

OK Cancel

2. Customize the parameter settings for this report by making selections for the following display options:

**Parameter Location** - This property controls where the parameter region is displayed in the report viewer. The options are:

- Horizontal Region - Displays the parameters horizontally across the top of the report viewer.
- Vertical Region - Displays the parameters vertically along the left side of the report viewer.
- Full Page - Displays the parameters on a separate page in the report viewer. After a user enters parameter values, the page is dismissed. To change parameter values, click the report viewer **Parameters** button to display the **Parameters** page again.
- Dialog - invokes a dialog box to display the parameters. After a user enters parameter values, the dialog is dismissed. To change parameter values, click the report viewer **Parameters** button to display the dialog again.

**Parameter Label Location** - This property controls where the parameter labels are displayed. The options are:

- Place label on side - Places the parameter label to the left side of the entry box.
- Place label on top - Places parameter label on top of the entry box.

**Show Apply Button** - This property controls the display of the **Apply** button in the report viewer.

When set to True, reports with parameter options display the **Apply** button in the report viewer. When a user changes the parameter values, he must click **Apply** to render the report with the new values.

When set to False, the report viewer doesn't display the **Apply** button. Instead, when a user enters a new parameter value, Publisher automatically renders the report after the new value is selected or entered without further action from the user.

This property is also set at the server level. To always use the server setting, choose the Default option.

When deciding whether to remove the **Apply** button, consider the ability of the underlying data sources to quickly return data. Lists of values that're based on static lists or very fast data sources are ideally suited to turning off the **Apply** button. If the underlying data sources for the lists of values queries are slow, or if there're many parameter values to set and refine before rendering the report, then retaining the **Apply** button is recommended.

**Show** - This property controls whether the parameter is displayed to the user. Disable the **Show** property if you don't want the user to see or change the parameter values that're passed to the data model.

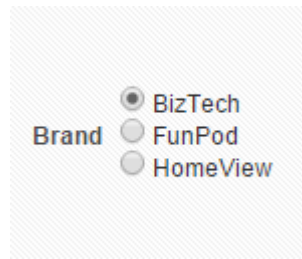
Don't hide a parameter on which other parameters depend. If the value of a hidden parameter changes, then any parameters that dependent on that hidden parameter aren't updated. This lack of updating might cause report generation to fail with a message such as "Invalid Parameter Requested".

**Type** - This property is customizable for menu type parameters only. For menu type parameters, the following display options are available:

- **Check box** - If the parameter allows multiple selections, (Multiple = True) this option is available. The check box type displays all menu options in the parameter region of the report. Users can make multiple selections, as shown the following figure:



- **Radio button** - If the parameter allows only a single selection (Multiple = False), this option is available. The radio button type displays all menu options in the parameter region of the report. Users can make a single selection as shown in the following figure:



- The check box and radio button options are best suited for menus when the list of values is small. These options also display well when the **Parameter Location** is the vertical region.

**Multiple** - This property is display only; it indicates whether multiple values may be selected for a menu parameter.

**Display Label** - Use this property to edit the display labels shown for each parameter. The default values are defined in the data model.

**Default Value** - Use this property to configure the default value for the parameter specifically for this report. Choose *Default* to pass the default value defined in the data model.

**Row Placement** - Use this property to configure the number of rows for displaying the parameters and in which row to place each parameter. For example, if your report has six parameters, you can assign each parameter to a separate row, 1 - 6, with one being the top row; or, you can assign two parameters each to rows 1, 2, 3. By default, all parameters are assigned to row 1.

- When the **Parameter Location** property is set to Vertical Region, only one parameter displays per row. You can use the Row Placement property to order the rows vertically.

## Configure Report Properties

In the report editor, click **Properties** and launch the Report Properties dialog to configure report properties.

The Report Properties dialog has the following option sets:

- **General** - Set general properties for the report.
- **Caching** - Specify caching options for this report.
- **Formatting** - Set the runtime configuration properties for the report.
- **Font Mapping** - Create font mappings for this report.
- **Currency Format** - Define currency formats for this report.

## Set the General Properties

Set the properties on the General tab as follows:

## Run Report Online

Disable this property if you don't want users to view this report in the online Report Viewer.

When disabled, users can Schedule the report only. For most reports you keep this enabled. Disable it for long-running, batch, or other reports for which online viewing isn't appropriate. When this property is enabled, you can also set the properties described in the following table.

Property	Description	Default
<b>Show controls</b>	This property controls the display of the control region of the report. The Control region consists of the Template list, Output list, and Parameter lists. Disable this property if you don't want users to view and update these options.	Enabled
<b>Allow Sharing Report Links</b>	The <b>Actions</b> menu of the Report Viewer includes the option <b>Share Report Link</b> , which enables users to display the URL for the current report. Disable this property if you don't want users to see and copy the report link.	Enabled
<b>Open Links in New Window</b>	This property controls how links contained within a report are opened. By default links open in a new browser window. Disable this property to open links in the same browser window.	Enabled
<b>Asynchronous Mode</b>	Reports run in asynchronous mode use a unique thread to execute the report when run in the report viewer. This allows Publisher to cleanly terminate the thread if a user cancels the report execution. Note that there're performance implications when enabling this property.	Not Enabled
<b>Auto Run</b>	When this property is enabled, the report automatically runs when the user selects the <b>Open</b> link for the report. When Auto Run is disabled, selecting the <b>Open</b> link for the report displays the online viewer but doesn't run the report. The user must select an output type from the <b>View Report</b> menu to run the report.	Enabled

## Advanced Options

You can set the advanced properties for a report.

The following table describes the advanced property options.

Property	Description
<b>Job Priority</b>	<p>Specifies the priority for the report. You can assign Critical, Normal, or Low priority for a report. By default, the priority of a report is Normal.</p> <p>Publisher sets the JMS Priority to sort the scheduled report jobs based on priority, and enables the high priority report jobs to run before the non-critical jobs.</p> <p>If all the reports have the same priority, Publisher processes the reports in First In First Out (FIFO) order. You can view the priority settings of jobs in the Report Job History page.</p>



Property	Description
<b>Send Output as URL</b>	<p>Specifies whether to send the report output as a URL. This report-level property overrides the setting of the <b>Email Output as URL</b> instance-level property. Administrators and report authors can configure this report-level property.</p> <ul style="list-style-type: none"> <li>• <b>Instance Level</b> - Select this option to configure the report-level property to the same value as the <b>Email Output as URL</b> instance-level property.</li> <li>• <b>Enabled</b> - Select this option to configure the report to send the report output as a URL, no matter the setting of the <b>Email Output as URL</b> instance-level property.</li> <li>• <b>Disabled</b> - Select this option if you don't want to send the report output as a URL, even though the administrator has enabled the <b>Email Output as URL</b> instance-level property.</li> </ul>
<b>Save XML for Republishing</b>	<p>Specifies whether to save the XML data for republishing the report. Deselect this option to disable generation of the XML data file for the report.</p>
<b>Disable "Make Output Public" option</b>	<p>Select this option to prohibit anyone from scheduling this report to make the output public. This disables the <b>Make Output Public</b> option for the report in the Output tab of the Schedule Report Job page.</p>
<b>Enable Bursting</b>	<p>Select this option to enable bursting of the report output, and then select the appropriate bursting definition from the list. When a user schedules the report, the selected bursting definition will be enabled in the Scheduler.</p> <p>The bursting definition is a component of the data model.</p>
<b>Enable Chunking   Chunk Size</b>	<p>Select this option to enable XML data chunking for a report job and specify the data size for each chunk. The layout processor outputs individual XML data chunks and merges them to generate a consolidated final report output. This option is available only if you have enabled XML data chunking at the server level.</p> <p>XML data chunking isn't available for online reports. XML data chunking in a report job supports RTF, XPT, and eText output formats, but you can't schedule a job to output in multiple formats.</p>
<b>Ignore Email Domain Restrictions</b>	<p>Select this option to ignore the values set in the Allowed Email Recipient Domains property in the delivery configuration page.</p>
<b>Report is Controlled by External Application. Users cannot run or schedule report from catalog, can view history</b>	<p>Select this option when Publisher is integrated with another application that controls the generation of this report, and you do not want users to run and view this report directly from the catalog. Reports run by Publisher are stored in the Publisher history tables and users can view completed reports from the Report Job History page.</p>

## Set the Caching Properties

Set these options for caching.

The following illustration shows the Caching tab.

**Report Properties**

General **Caching** Formatting Font Mapping Currency Format

☐ Enable Data Caching

Caching Duration (minutes)

☒ User Level

☒ Document Caching

☐ User Can Refresh Report Data

OK Cancel

The following table describes the properties on the Caching tab.

Variable	Description	Default
<b>Enable Data Caching</b>	When this property is enabled, the data generated by the online submission of this report is stored in the cache. Subsequent requests to run this report with the same parameter selections display the report using the data from the cache. This setting enhances performance by using stored data to generate a report rather than regenerating the data from the source. The data remains in the cache according to the time limit that's specified in the Cache Duration property. You can control whether the cache for the report is shared by users by setting the User Level property.	Not Enabled
<b>Caching Duration (Minutes)</b>	Enter the time limit for a report dataset or document to remain in cache. Once the time limit has expired, the next request for the same report generates a fresh dataset.	30 minutes
<b>User Level</b>	This property stores a separate cache for each user. The report data shown to each user comes only from the private cache. When enabled, this property ensures that each user can only see data that they're authorized to view. However, user-level cache has less efficient performance. If the report data isn't user sensitive, you can disable this property to enhance performance.	Enabled
<b>Document Caching</b>	Enable this property to cache the report document. With document cache enabled, when a user views the report online, the document (data plus layout) is placed in the cache. When any other user (unless User Level is enabled) uses the online viewer to view the exact same report (same layout, same output type, same parameter selections) the document is retrieved from the cache. The document remains in the cache according to the caching duration specified. Scheduled reports don't use document cache.	Enabled

Variable	Description	Default
<b>User Can Refresh Report Data</b>	When this property is enabled, the user can choose to refresh the data on demand. When the user clicks <b>Refresh</b> in the report viewer, Publisher generates a fresh dataset for the report.	Not Enabled

## Set the Formatting Properties

The Formatting properties tab enables you to set runtime properties at the report level.

These same properties can also be set at the system level, from the Administration page. The Formatting properties tab displays both the system-level setting and the report-level setting for each property. If different values are set at each level, the report level takes precedence.

For a full description of each property, see [Set Report Processing and Output Document Properties](#).

## Configure Font Mapping

You can map base fonts in RTF or PDF templates to target fonts to be used in the published document. Font mappings can be set at the report level or the system level. The administrator configures the system level font mappings in the Runtime Configuration page. When you view the report properties Font Mapping tab, any system level settings are displayed. To change the settings for this report, edit the font mappings here.

1. Under RTF Templates or PDF Templates, Click **Add**.
2. Enter the following in the new row:
  - Base Font: Enter the font family to map to a new font. Example: Arial
  - Select the **Style**: Normal or Italic (Not applicable to PDF Template font mappings)
  - Select the **Weight**: Normal or Bold (Not applicable to PDF Template font mappings)
  - Select the **Target Font Type**: Type 1 or TrueType
  - Enter the **Target Font**.

If you selected TrueType, then you can enter a specific numbered font in the collection. Enter the **TrueType Collection (TTC) Number** of the desired font.

## Configure Currency Formats

In the **Currency Format** tab, map a number format mask to a specific currency so that reports can display multiple currencies with their own corresponding formatting. Currency formatting is only supported for RTF and XSL-FO templates.

Currency formats can be set at the report level or the system level. The report properties display the system level settings in the **Currency Format** tab. You can edit the currency format and change the settings for the report.

To apply these currency formats in an RTF template, you must use the format-currency function.

1. Click the **Add** icon.
2. Enter the ISO currency code, for example: USD, JPY, EUR, GBP, INR.

### 3. Enter the format mask to apply for this currency.

The Format Mask must be in the Oracle number format. The Oracle number format uses the components "9", "0", "D", and "G" to compose the format, for example: 9G999D00

where

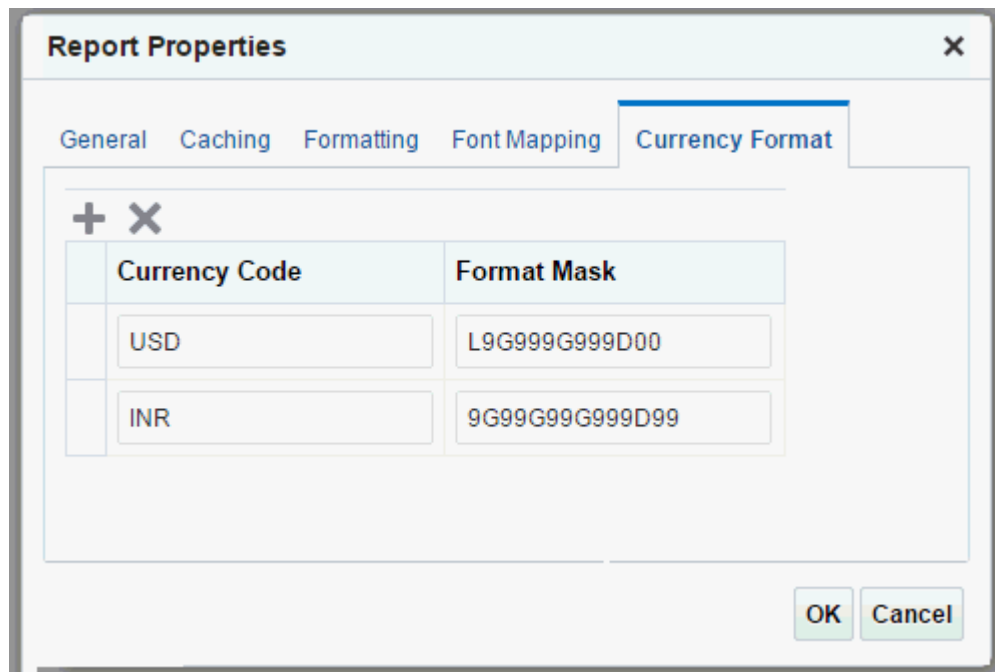
9 represents a displayed number only if present in data

G represents the group separator

D represents the decimal separator

0 represents an explicitly displayed number regardless of incoming data

The following figure shows sample currency formats:



## Access Reports via a URL

You can call a report via a URL from another application.

Use the report URL format and specify the parameters for the report in the URL.

### Report URL Format

You can call a report using a URL, for which you can build the URL.

The basic URL for a report is:

`https://<server:port>/ui/xmlpserver/<ReportDirectory>/<ReportName>.xdo`  
or

`https://<server:port>/xmlpserver/<ReportDirectory>/<ReportName>.xdo`  
where

server:port is the name of the server and port number where Publisher is running

ui is a static string for the user interface path

xmlpserver is a required static string (the name of the application)

ReportDirectory is the folder path to the report. When the report is under Shared Folders, don't include "Shared Folders" in the path. If the report is under My Folders, include the ~username as the first node in the path. See the examples following.

ReportName.xdo is the name of the report with the .xdo extension. If the name contains spaces, replace the space with a "+" character.

### Examples

The following examples render the complete report inside the report viewer with all the report controls.

The following URL launches the North America Sales report. The report resides in the catalog under Shared Folders/Samples/Sales. Note that Shared Folders isn't included in the path.

`https://example.com:7001/xmlpserver/Samples/Sales/North+America+Sales.xdo`

The following URL launches the North America Sales report that resides in the catalog under My Folders/Samples/Sales. Note that the user name in this case is weblogic, therefore the first node in the path is ~weblogic.

`https://example.com:7001/xmlpserver/~weblogic/Samples/Sales/North+America+Sales.xdo`

## Report URL Parameters

When you use a URL to call a report, you can specify parameters in the URL.

The default layout, default output format, and default parameters are used to render the report. You can add parameters to the URL to specify how the report renders.

When you construct the URL, note the following standard URL syntax:

- ? denotes the first parameter
- & denotes each additional parameter

The following table describes the parameters you can add to the URL.

Parameter	Definition	Example Usage
_xpt	Specifies whether to render the report in the report viewer or export the document to a new window appropriate for the output type. For example, if the output type specified is html, the report document (only) will render in a browser window; if the output type is PDF you will be prompted to save or open the PDF document. When this parameter isn't specified, the report renders in the report viewer. Valid values are: <ul style="list-style-type: none"> <li>• 0 renders the report in the report viewer</li> <li>• 1 exports the document to appropriate application window</li> </ul>	_xpt=0
_xdo	(Optional) Provides the path to the report.	_xdo=%2FSamples%2FSalary+Report.xdo
_xt	Specifies the layout to use. Enter the name of the layout as defined in the report definition. If an invalid name is entered, the default layout is used.	_xt=Manager+Summary

Parameter	Definition	Example Usage
<code>_xf</code>	Specifies the output format. If no value is specified, the default output format is used. If an invalid value is specified, or, if a value is specified that isn't enabled for the layout, the report doesn't render. Valid values are: <ul style="list-style-type: none"> <li>analyze for Interactive output</li> <li>rtf</li> <li>docx</li> <li>pdf</li> <li>html</li> <li>pptx for PowerPoint 2007</li> <li>ppt for PowerPoint</li> <li>xml for data</li> <li>excel for Excel</li> <li>excel2000 for Excel 2000</li> <li>xslx for Excel 2007</li> <li>csv</li> </ul>	<code>_xf=pdf</code>
Report parameters as named in the data model	Specify name-value pairs for the parameters specific to the report. You must use the parameter name as defined in the data model.	<code>dept=10</code>
<code>_xmode</code>	Specifies the report viewer mode. If not specified, defaults to view in the full report viewer. Valid values are: <ul style="list-style-type: none"> <li>0 to view in the full report viewer.</li> <li>1 to hide Publisher banner, hide parameters, can change layout, other actions: export only.</li> <li>2 to hide Publisher banner. (No Header)</li> <li>3 to hide Publisher banner and parameters. (No Parameters)</li> <li>4 to hide Publisher banner, parameters, other actions, and layouts. (Document Only)</li> </ul>	<code>_xmode=1</code>

Example:

`https://example.com:7001/xmlpserver/Samples/Salary+Report.xdo?`

`_xpt=0&_xdo=%2FSamples%2FSalary%20Report.xdo&_xmode=4&dept=10&_xt=Simple&_xf=html`

This URL runs the "Salary Report" report located under Shared Folders/Samples. Note the following:

`_xpt=0` renders the document in the report viewer

`_xdo=%2FSamples%2FSalary%20Report.xdo` defines the report path

`_xmode=4` renders the document only

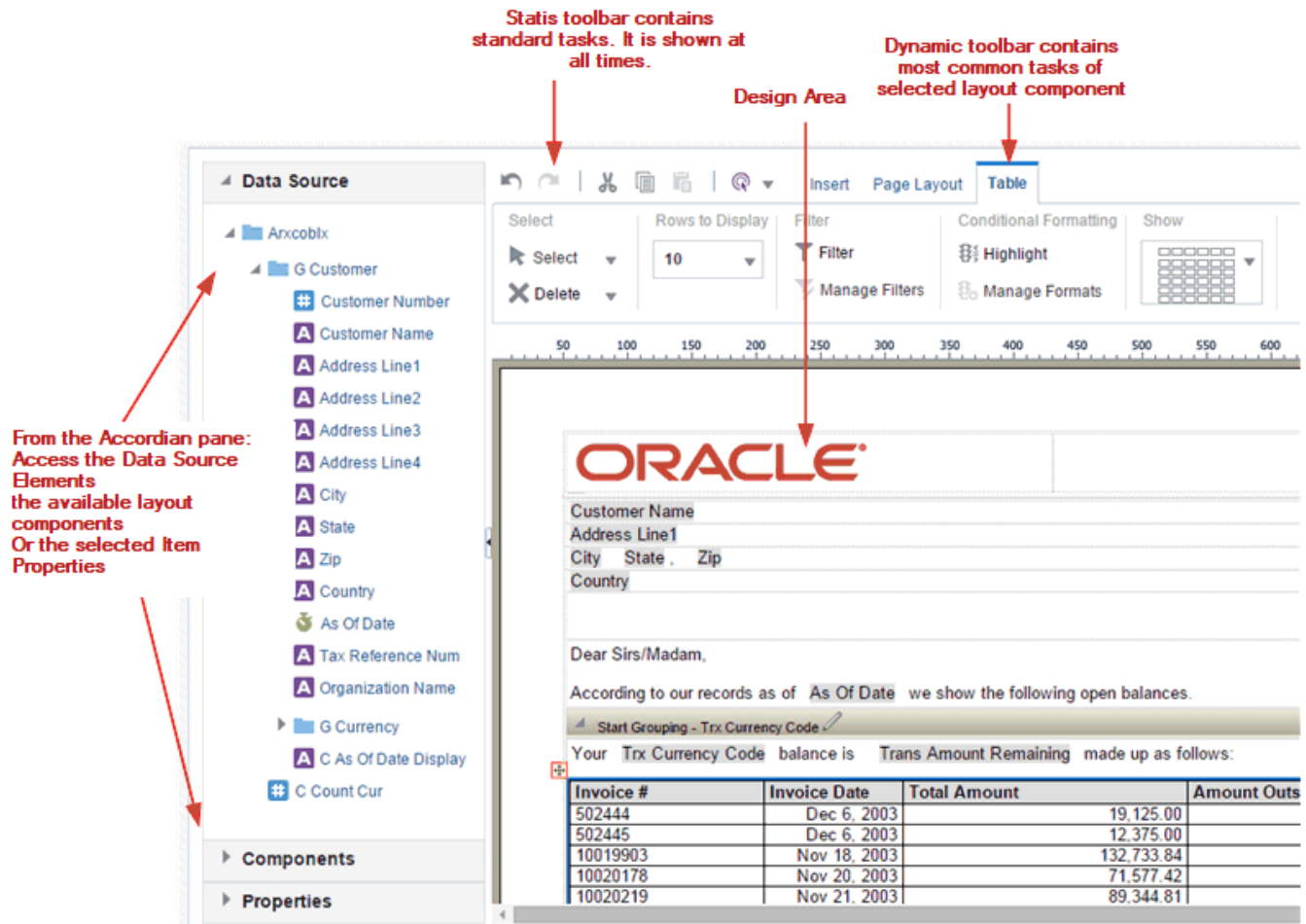
`dept=10` sets the report-specific parameter "dept" to "10"

`_xt=Simple` uses the layout called "Simple"

`_xf=html` sets the output format to html

## About the Layout Editor Interface

The illustrated figure shows the layout editor interface.



The **Layout Editor** interface comprises the following:

- The top of the **Layout Editor** contains two toolbars:
  - The **Static toolbar** is always available and contains common commands such as save and preview.
  - The **Tabbed toolbar** includes the **Insert** tab, the **Page Layout** tab, and a dynamic tab that shows the most commonly used actions and commands for the selected layout component. You can collapse this toolbar to make more room to view the design area. See [About the Tabbed Toolbar](#).
- The accordion pane on the left contains the following:
  - Use the **Data Source** pane to select the data fields to drag to the layout components.
  - Use the **Components** pane to select layout components and drag them to the design area. You can also use the **Insert** tab to insert components when this pane is collapsed.
  - Use the **Properties** pane to modify properties for the selected layout component.

You can expand and display each control by clicking the title of the control or the plus sign next to the title of the control. You can collapse the entire accordion pane to allow more room to view the layout.

- The lower right region is the design area for building the layout.

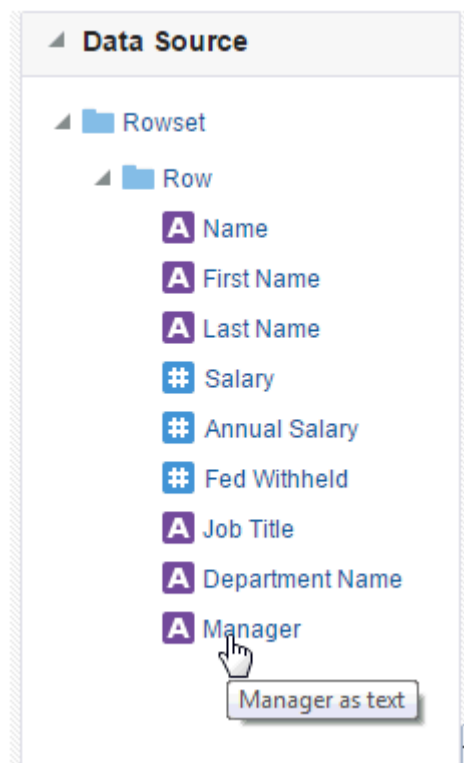
## About the Data Source Pane

The **Data Source** pane displays the structure of the data model and the data elements that are available to insert into the layout.

To insert a data element, select and drag it from the **Data Source** pane to the component in the layout.

The data type for each field is represented by an appropriate icon: number, date, or text.

The following figure shows the data source pane. The icon beside each element indicates the data type.



The JOB\_TITLE element is shown as text, the SALARY element is shown as a number, and the HIRE\_DATE element is shown as a date data type.

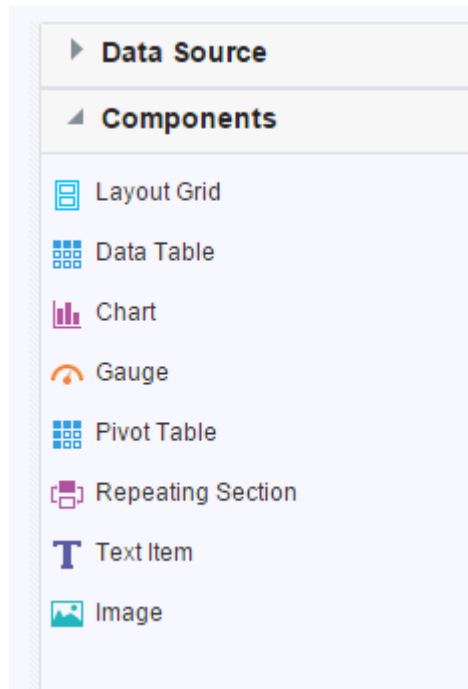
Note that when you enter dates in the Layout Editor (such as a data comparison for a filter or for conditional formatting), use one of the following XSL date or time formats: YYYY-MM-DD or YYYY-MM-DDTHH:MM:SS.

## About the Components Pane

The **Components** pane contains the layout components that you can insert into a report. These components include charts, pivot tables, and images. To insert a component, simply drag and drop it to the layout.

You can also use the **Insert** menu to add components to the layout.





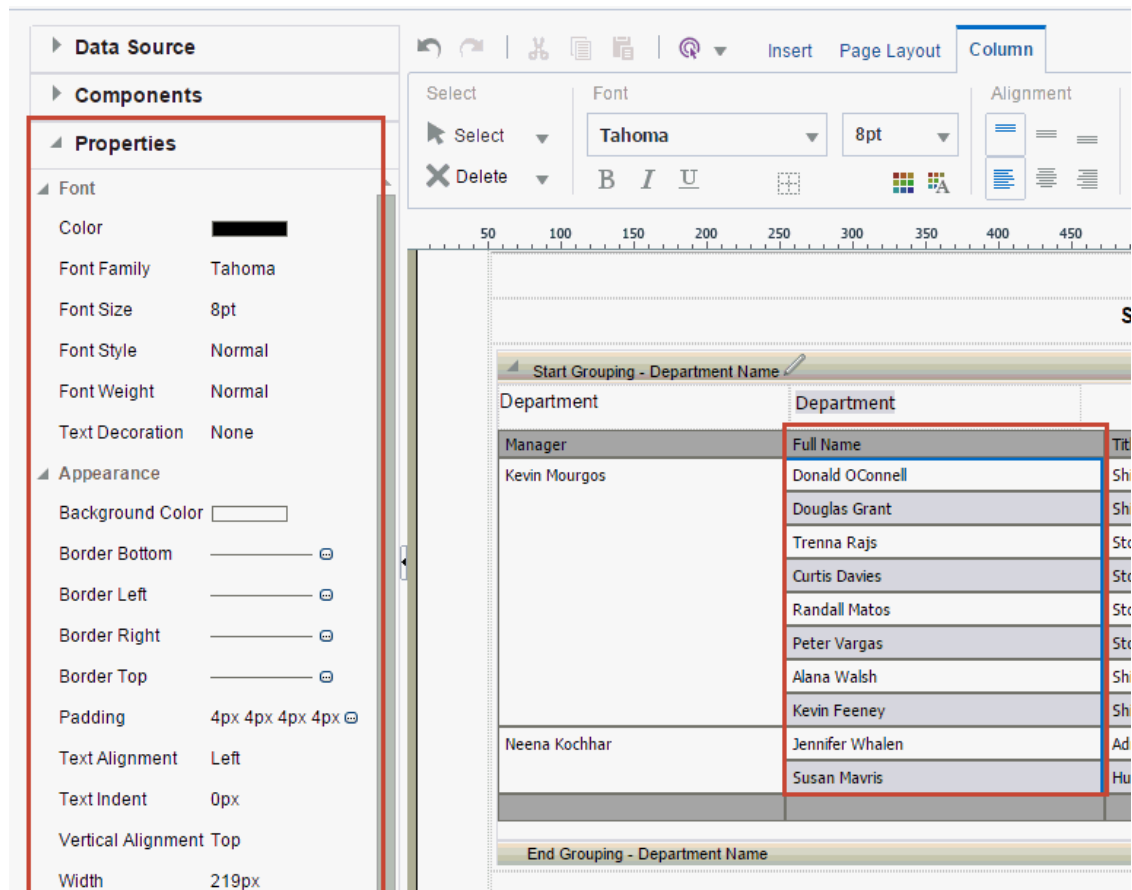
## About the Properties Pane

The **Properties** pane displays the properties for the selected component. The properties displayed are determined by the selected component. Some of the properties available in the **Properties** pane are also editable in the dynamic tab for the component.

Click a property value to edit it. The change is applied to the component when you move the cursor out of the field. Collapse or expand a property group by clicking the plus or minus signs beside the group name.

The properties available for each component are discussed in detail in the corresponding section for that component in this chapter. If a property field is blank, then the default is used.

The following figure shows a sample **Properties** pane for a table column header.



## About the Tabbed Toolbar

The section defines the tabs and their functions in the Tabbed toolbar.

The Tabbed toolbar contains the following tabs:

- The **Insert** tab provides the components and page elements that can be placed on a layout. See [Insert Layout Components](#).
- The **Page Layout** tab provides common page-level tools and commands. See [Page Layout Tab](#).
- The component-specific tab provides the most commonly used commands and properties for the component that is selected in the layout. For example, when you select a chart, the **Chart** tab displays. See the section on a specific component for details on the commands.

To set or control more properties for the selected component, open the **Properties** pane in the accordion pane, as described in [About the Properties Pane](#).

## Select and Delete Layout Objects

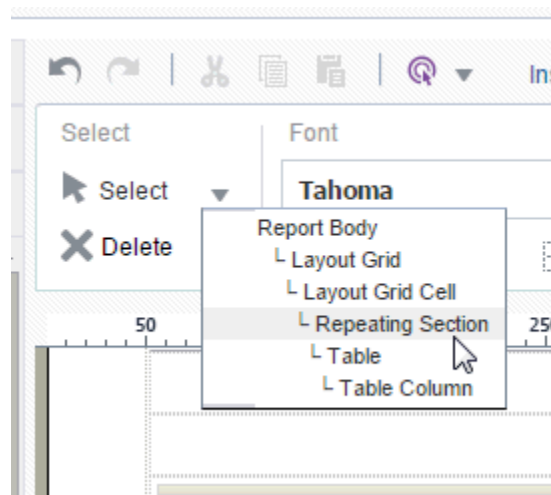
You can select layout objects to set the focus or remove the object entirely

Each of the component-specific tabs include the **Select** region.

- The **Select** tool enables you to control precisely which component on the layout has focus. This ability is particularly helpful when working with a complex layout where components overlap. For example, to select a table, it's sometimes difficult to click the correct spot to

select the table and not a column, or header cell. To avoid unnecessary clicking, use the Select tool to precisely select the Table component from the list.

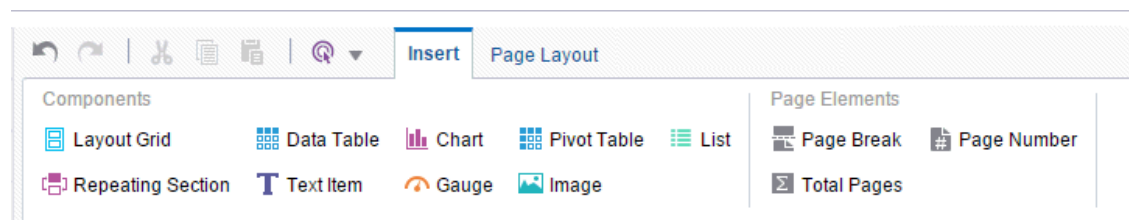
The following illustration shows the **Select** tool.



- The **Delete** tool provides a similar function to the **Select** tool to enable you to precisely select the component to delete.

## About the Insert Tab

Use the **Insert** tab to insert report components and page elements.



The **Components** group displays the report components that you can insert into the layout. To insert a component, select and drag the item to the desired location in the design area. For more information about each component, see its corresponding section in this chapter.

The **Page Elements** group contains page-level elements for the report. To insert a page break, the page number, or the total page number calculation, select and drag the component to the desired position in the layout. Note that **Page Elements** are intended for paginated output types, such as PDF and RTF. Using them in interactive or HTML output may have unexpected results.

# Create Publisher Layout Templates

This topic describes creating Publisher layout templates using the layout editor for pixel-perfect reporting.

## Topics:

- [Overview of Publisher Layouts](#)
- [Launch the Layout Editor](#)
- [About the Layout Editor Interface](#)
- [Page Layout Tab](#)
- [Insert Layout Components](#)
- [Insert Layout Grids](#)
- [About Repeating Sections](#)
- [About Data Tables](#)
- [About Charts](#)
- [About Gauge Charts](#)
- [About Pivot Tables](#)
- [About Text Items](#)
- [About Images](#)
- [About Lists](#)
- [Set Predefined or Custom Formulas](#)
- [Save a Layout](#)

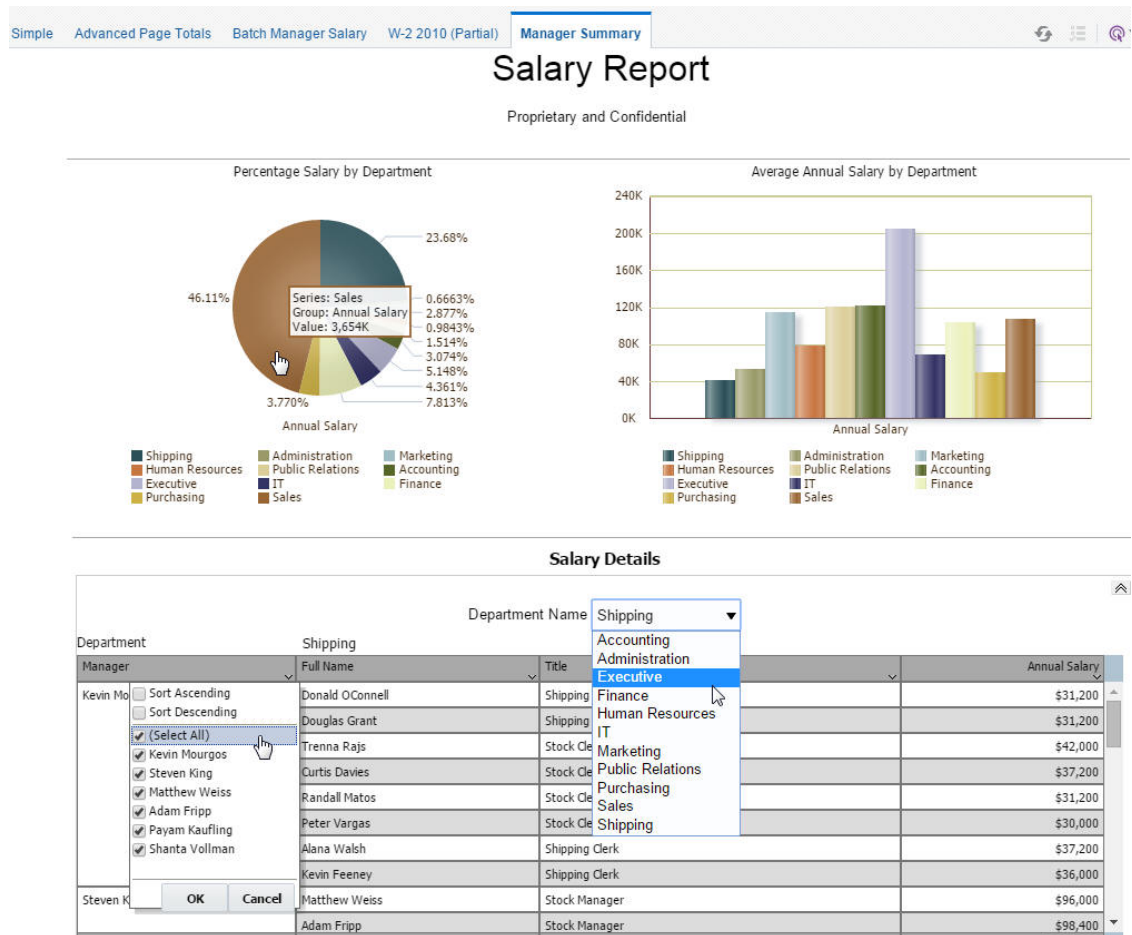
## Overview of Publisher Layouts

Use the Publisher layout editor to create Publisher layout templates for pixel-perfect reports.

The Publisher layout template enables end users to:

- View Dynamic HTML output and perform lightweight interaction with their report data from within a browser
- Generate high fidelity, pixel-perfect reports to PDF, RTF, Excel, PowerPoint, and static HTML

The Publisher layout editor is a design tool that provides a WYSIWIG, drag and drop interface for creating pixel-perfect reports in PDF, RTF, Excel, Word, PowerPoint, and HTML. It also provides dynamic HTML output that supports lightweight interaction through a browser. This interactive output is featured in the following illustration.



Notice the following features:

- Pop-up chart details - Hover cursor over chart items to display details of data.
- Group filtering - Grouped regions can be filtered by the grouping element.
- Scrollable tables - Table data can be scrolled while maintaining display of the headers and totals.
- Table column sorting - Table data can be sorted by different columns from within the viewer.
- Table column filtering - Table data can be filtered by values in different columns from within the viewer.
- Automatic table totaling - Table data totals are automatically added to the layout.
- Propagated filtering - Filter other components by clicking on chart areas or by clicking on pivot table header, column, or elements.
- Collapse and expand areas of the document.

## When to Use a Publisher Layout

Publisher layouts are best suited for reports of simple to medium complexity that don't require custom coding.

Because the dynamic HTML view is only available for Publisher layouts, always use a Publisher layout when report consumers need an interactive report (change sorting, apply filters, and so on).

## Prerequisites, Recommendations, and Limitations

These tips will help you use Publisher more effectively.

- To use the layout editor, your account must be granted a role that includes the appropriate permissions for accessing report layout tools.
- You must attach sample data to the data model before you create a new layout.
- For optimum viewing, set your display resolution to 1024 x 768 or higher.
- Publisher can handle a large amount of data for interactive sorting and filtering and still provide fast response. It's best to summarize data in the Data Model to the level of interest for the consumer for optimal performance. Publisher layouts can generate static output such as PDF or RTF documents up to 50% faster than comparable RTF layouts depending on the data.
- The layout editor doesn't support namespaces or attributes in the XML data.

## Launch the Layout Editor

The layout editor is available in several places.

Launch the layout editor in one of the following ways:

- [Create a New Report](#)
- [Edit a Report](#)
- [View a Report](#)

## Create a New Report

You can use the Layout Editor to change the appearance of a report.

To launch the Layout Editor when creating a new report:

1. Select the data model for the new report.  
The Report Editor displays the Add Layout page.
2. From the Create Layout region, click a predefined template to launch the Layout Editor.

## Edit a Report

You can alter the layout of a report using the Layout Editor.

To launch the Layout Editor when editing a report:

1. In the Report Editor:  
From the **Thumbnail** view, click **Add New Layout**.  
or  
From the **List** view, click the **Create** button on the layouts table toolbar.

2. From the **Create Layout** region, click a predefined template to use to launch the Layout Editor.

## View a Report

You can change the layout of a report while viewing it.

To launch the Layout Editor when viewing a report:

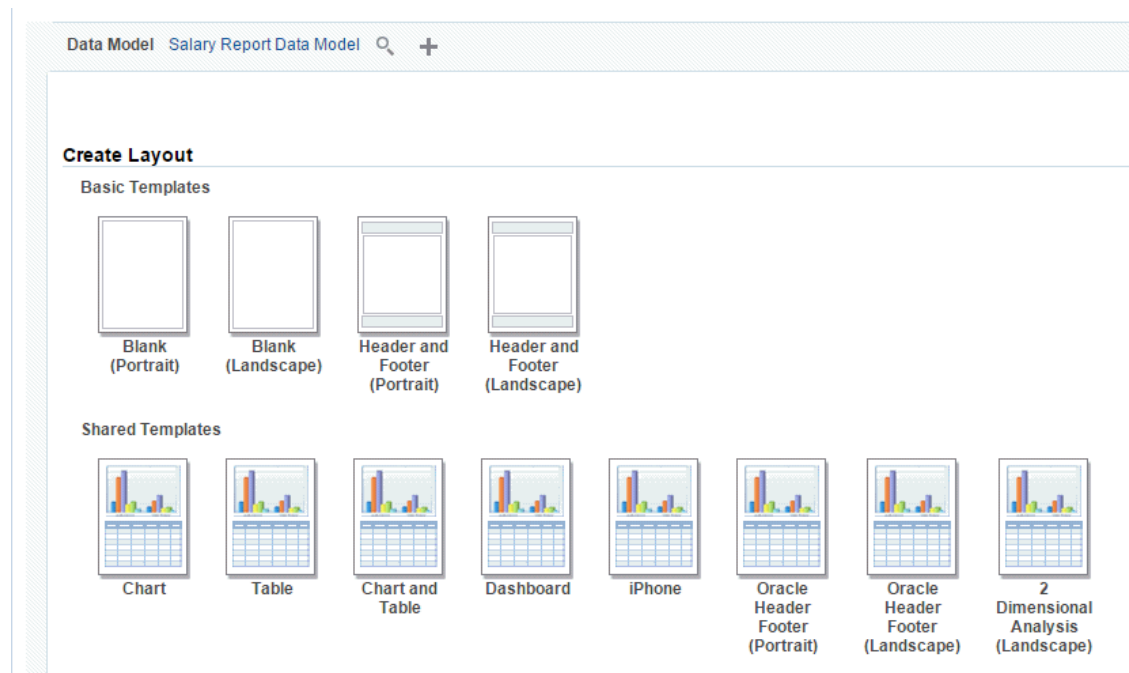
- Click **Actions** and then click **Edit Layout**.

The layout must have been created in the layout editor.

## Select a Predefined Layout

When you create a new layout, you are given the option of selecting a predefined layout to help you get started.

The following illustration shows the predefined layouts offered by the Basic and Shared Templates.



The Basic and Shared Templates offer common layout structures with specific components already added. Choosing one of the predefined layouts is optional, but can facilitate layout design. If your enterprise utilizes a common design that isn't available here, then you can add predefined layouts for your own use, or your Administrator can add more for all users.

## Add Shared Templates for All Users

Follow the steps to add redefined layout files to the shared directory for all users to access.

1. Log in with Administrator privileges and navigate to the **Catalog**.
2. In the Shared Folders directory, open the **Components** folder.

3. Locate the **Boilerplates** report and click **Edit**.
4. Click **Add New Layout**.
5. Design or upload the layout.

To design the layout: Click an existing boilerplate (or blank) to launch the layout editor. Insert the components to the layout. When finished, click **Save** and give the boilerplate a name. This layout is now displayed to all users in the **Shared Templates** region.

To upload a layout: Click **Upload** to upload a predefined Publisher Template (.xpt file).

6. Save the report.

Any Publisher Templates (.xpt) added to this report are displayed to all users as a Shared Template.

## Add Personal Predefined Layouts

Adding personal predefined layouts are available to your account user only. You can design the layout by launching the layout editor or you can upload a predefined template.

1. Navigate to My Folders.
2. Create a new report called *Boilerplate*. This report doesn't have a data model.
3. Click **Add New Layout**.
4. Design or upload the layout.

To design the layout: Click an existing boilerplate (or blank) to launch the layout editor. Insert the components to the layout. When finished, click **Save** and give the boilerplate a name.

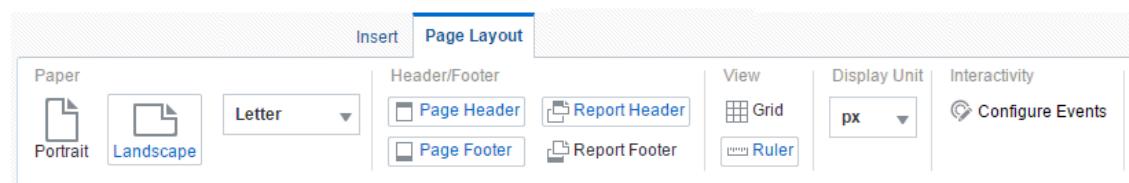
To upload a layout: Click **Upload** to upload a predefined Publisher Template (.xpt file).

These layouts are presented in the **My Templates** region when you create a new layout.

## Page Layout Tab

The Page Layout tab contains commands to set up the layout.

The figure below shows the Page Layout tab.



## Paper Options

Paper options include Orientation and Paper Size.

Option	Description
Orientation	Choose <b>Portrait</b> or <b>Landscape</b> .



Option	Description
Paper Size	Select from the following paper size options: Letter, Legal, A4, A3, Executive, B5, Com-10, Monarch DL, or C5. The paper size determines the dimensions of the layout area.

## Header/Footer Options

This table describes the header and footer options.

Option	Description
Page Header	Click to insert a page header in the layout. By default, the page header appears on every page of a printed report, but can be configured to skip the first page. To remove the page header, click <b>Page Header</b> again.
Page Footer	Click to insert a page footer in the layout. By default, the page footer appears on every page of a printed report, but can be configured to skip the last page. To remove the page footer, click <b>Page Footer</b> again.
Report Header	Click to insert a report header to the layout. The report header appears only once at the beginning of the report. To remove the report header, click <b>Report Header</b> again.
Report Footer	Click to insert a report footer to the layout. The report footer appears only once at the end of the report. To remove the report footer, click <b>Report Footer</b> again.

## Set Properties for Headers and Footers

The Properties pane enables you to set the following properties for headers and footers.

To access the Properties pane, select the header or footer in the design region, then click **Properties** from the accordion pane on the left of the page.

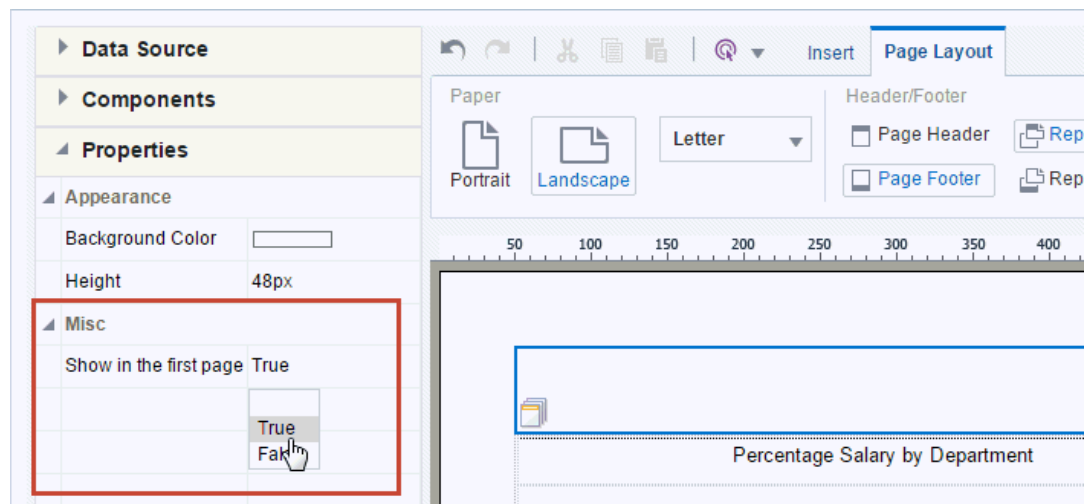
For all report and page headers and footers:

- **Height** - Set the height of the header region in pixels, points, centimeters, or inches

For headers:

- **Show in the first page** - Select **True** to show the header in the first page. Select **False** to suppress the header from the first page.

This figure shows the Properties for a report header.



For footers:

- **Show in the last page** - Select **True** to show the footer in the last page. Select **False** to suppress the footer from the last page.

## View Options

The following table describes view options.

Option	Description
<b>Grid</b>	Click to insert gridlines in the layout design area. The grid unit size depends on the <b>Display Unit</b> selected. To remove the gridlines, click <b>Grid</b> again.
<b>Ruler</b>	Click to insert a display ruler across the top of the layout design area. The ruler units depend on the <b>Display Unit</b> . To remove the ruler, click <b>Ruler</b> again.

## Display Unit

Select the unit of measure to display. This unit is used for the ruler and grid view options, as well as for any other function that displays a measurement, such as setting border widths and sizing grid cells. Options are: inch, px (pixel), cm (centimeter), and point (pt).

## Configure Events

The **Configure Events** option enables you to configure how components of the layout respond to events triggered by a user when viewing the report in interactive mode.

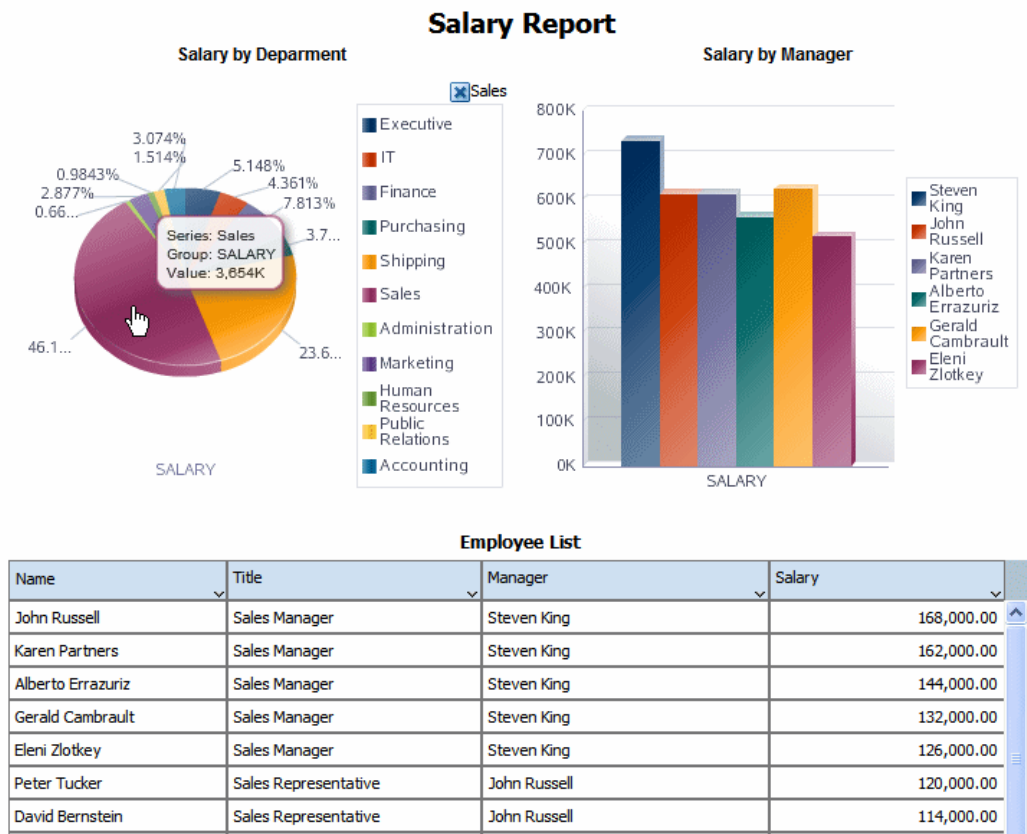
The two types of events are:

- **Filter** - If you click an element in a list, chart, or pivot table, that element is used to dynamically filter other components defined as targets in the report. The component being clicked doesn't change.
- **Show Selection Only** - If you click an element of a list, chart, or pivot table, the chart or pivot table (being clicked) shows the results for the selected element only. This action doesn't affect other components of the report.

## Example of Filter Event Configuration

The illustration here shows an example of filter event configuration. The layout contains two charts and a table. The first chart shows salary totals by department in a pie chart. The second chart shows salary totals by manager in a bar chart. The table displays a list of employees and their salaries.

In this report, if a user clicks on a value in the Salary by Department chart, you want the Salary by Manager chart and the Employees table to automatically filter to show only the managers and employees in the selected department.

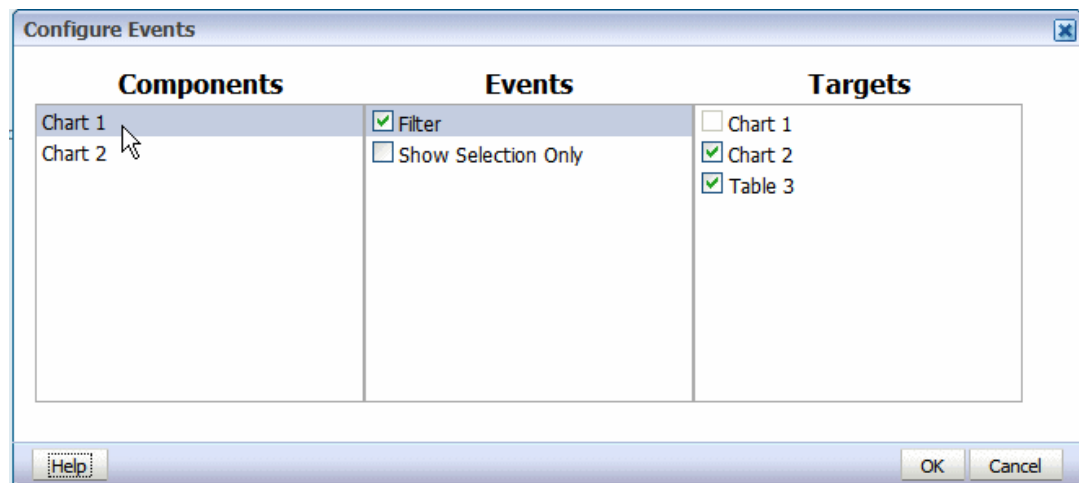


## Configure Automatic Filtering

Follow these steps to know how to configure automatic filtering.

1. On the **Page Layout** tab, click **Event Configuration** to display the Configure Events dialog.

The following figure shows the Configure Events dialog.



2. In the **Components** column, click the layout component (lists, charts, and pivot tables are available to configure).
3. Select **Filter** to enable automatic filtering in other report components.
4. Select the report components in the **Targets** column to enable the automatic filtering based on interactive events in the selected component. To disable the automatic filtering for a target component, clear the box.

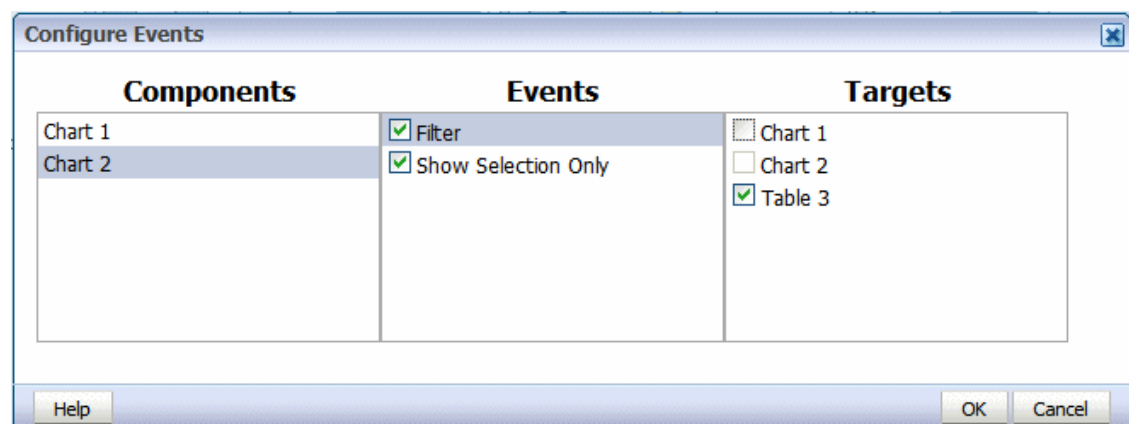
The preceding figure shows that the **Filter** event is enabled for Chart 1 in the layout. Chart 2 and Table 3 are selected as targets to enable automatic filtering when a selection event occurs in Chart 1.

The **Show Selection Only** option isn't enabled for Chart 1. That means that Chart 1 continues to display all values when one of its elements is selected.

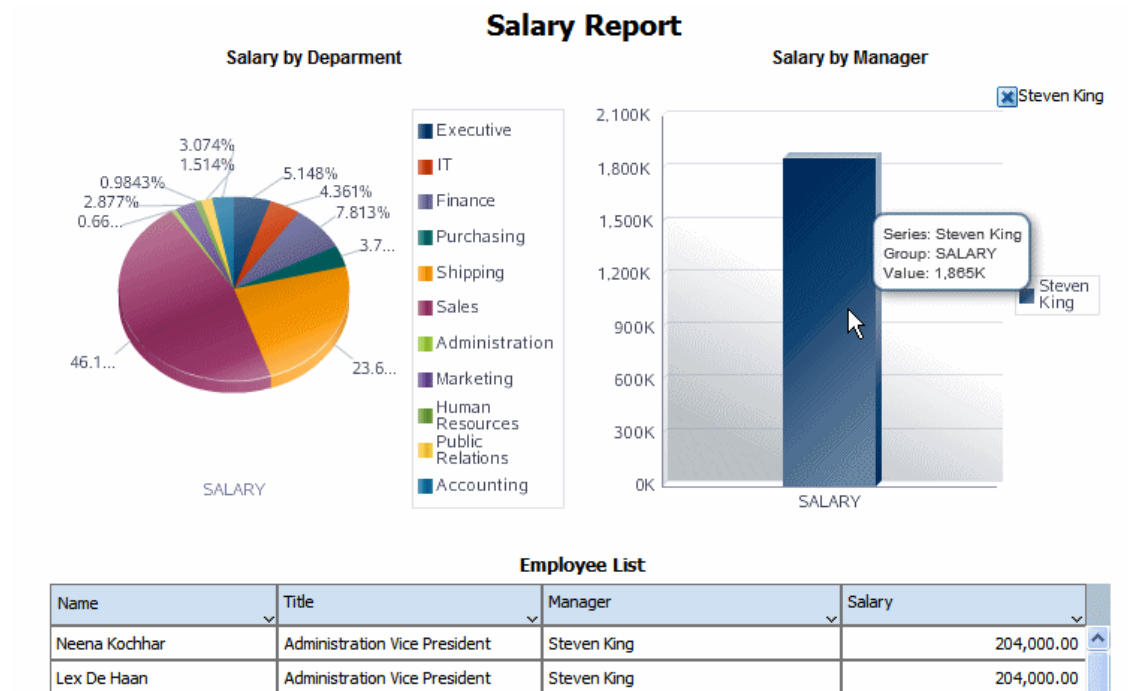
## Example: Show Selection Only

The Show Selection Only event displays only the value of the selected element within the chart or pivot table (being acted on).

In the example shown in the following figure, Chart 2 is configured with **Show Selection Only** enabled and **Filter** enabled with Table 3 as the Target.



This configuration results in the output shown in the following figure. When the user clicks on Chart 2, only the selected value is shown in Chart 2. Because the Filter event is enabled for Table 3, the selection is applied as a filter to Table 3.

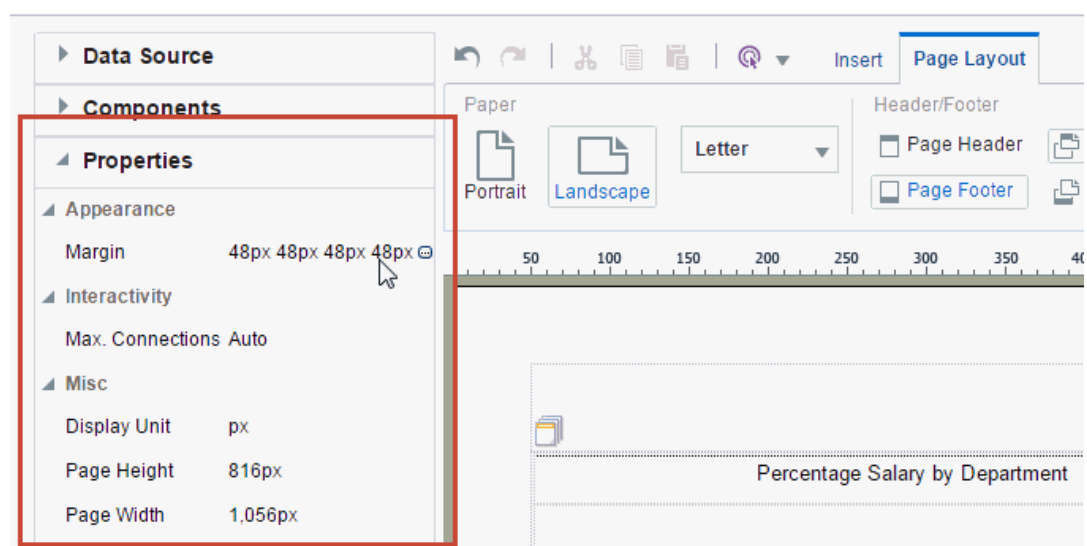


## Set Page Margins

You can set page margins for reports.

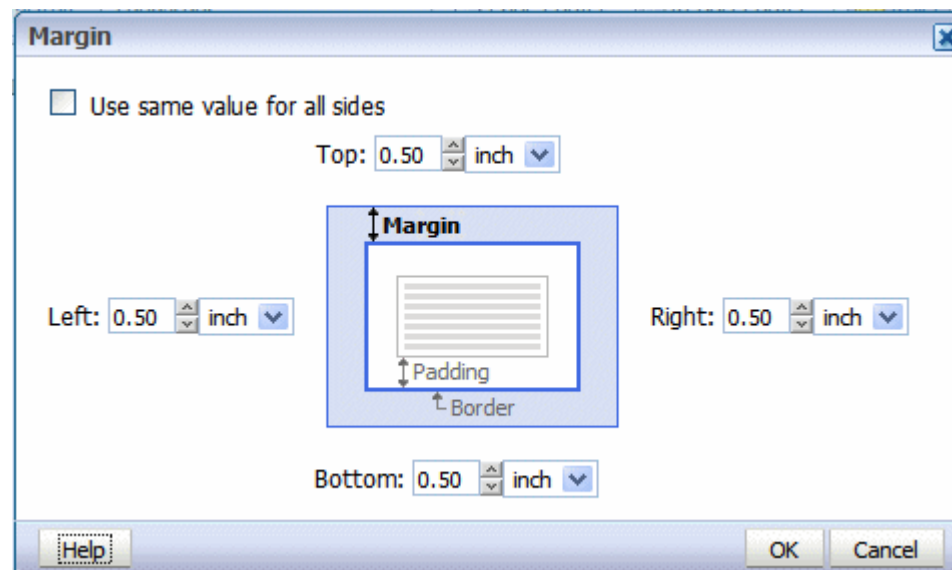
To set the page margins for the report:

1. Click anywhere in the design area outside of an inserted component.
2. Click the **Properties** pane in the lower left of the Layout Editor. The following illustration shows the Properties for the page.



3. Click the value shown for **Margin** to launch the Margin dialog.

The following illustration shows the Margin dialog.



4. Select the desired size for the margin. Enter the value for the Top, Left, Right, and Bottom margins.

To automatically set the same value for all sides, select the box: **Use same value for all sides**. This action disables all but the Top margin entry. Enter the value in the Top to apply to all sides.

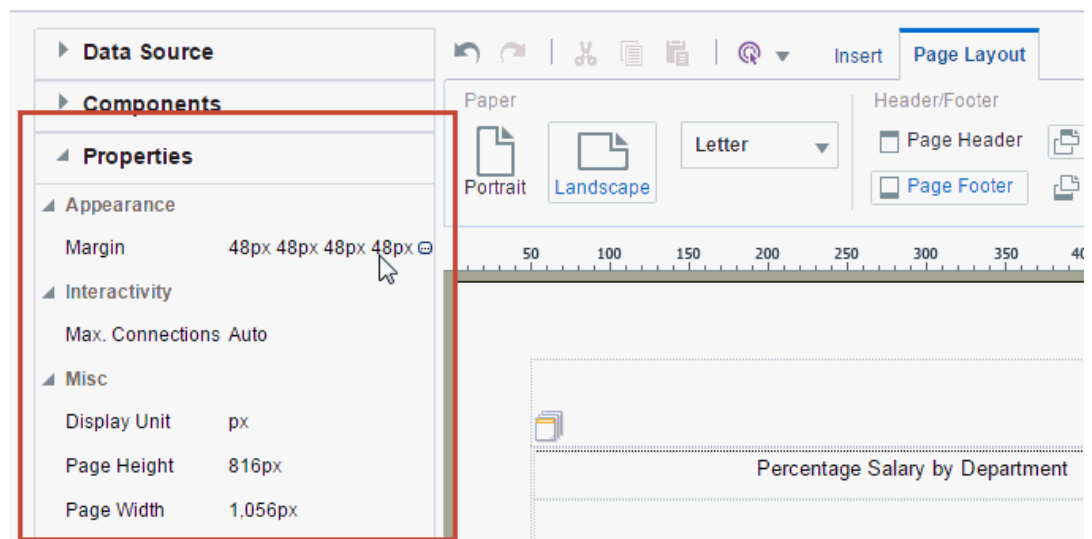
## Set Maximum Connections for an Interactive Report

You can limit the connections from the browser to the server for the interactive viewer.

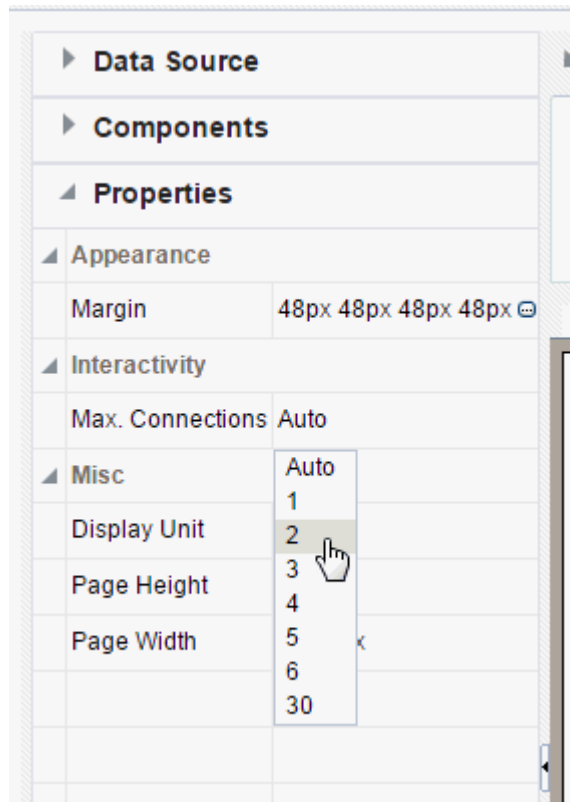
More connections are faster but increase server load. The default is six connections. Reduce the number to reduce the load on the server for large reports.

To set the maximum connections for this layout:

1. Click anywhere in the design area outside of an inserted component.
2. Click the Properties pane in the lower left of the Layout Editor. The following illustration shows the Properties for the page.



3. Click the value shown for **Max. Connections** and select the desired value from the list, as shown in the following illustration.



## Insert Layout Components

The layout editor supports components that are typically used in reports and other business documents.

The followings components are described in these sections:

- [Insert Layout Grids](#)
- [About Repeating Sections](#)
- [About Data Tables](#)
- [About Charts](#)
- [About Gauge Charts](#)
- [About Pivot Tables](#)
- [About Text Items](#)
- [About Images](#)
- [About Lists](#)

## Insert Layout Grids

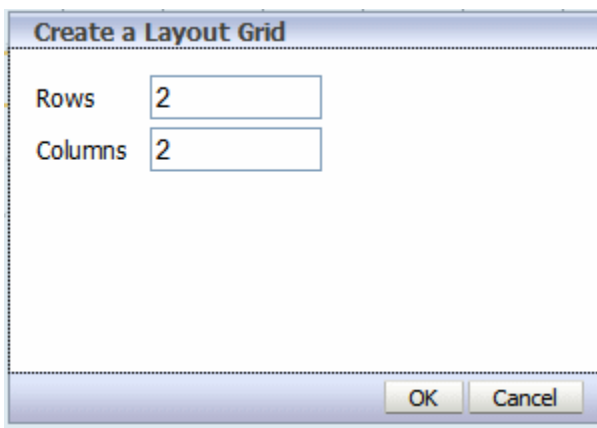
The layout grid provides a way to divide a layout into sections.

It functions similarly to a table in HTML or Word documents to create forms or to provide sophisticated layouts. Use a layout grid to control the exact placement of all other components in the layout.

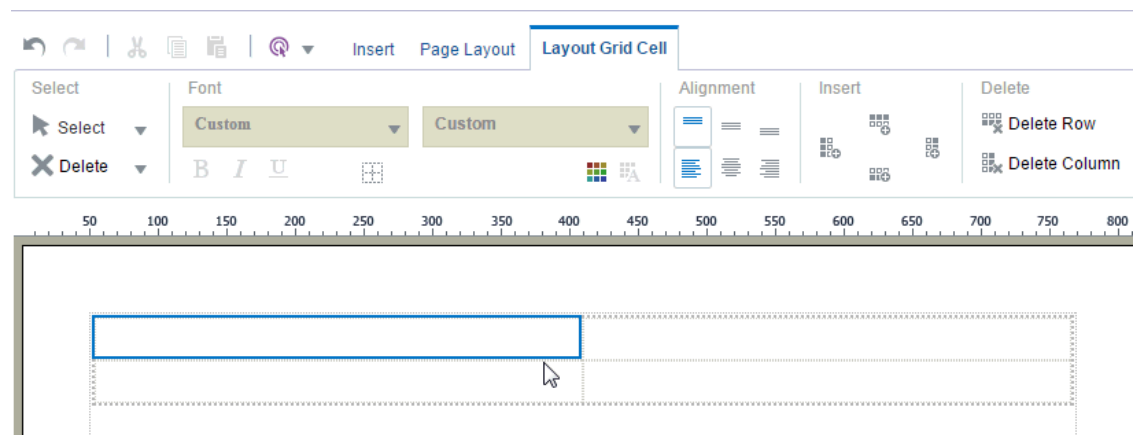
To insert a layout grid:

- Select and drag the **Layout Grid** component to the design area.

The following illustration shows the Create a Layout Grid dialog.



In the dialog, enter the number of rows and columns for the grid and click **OK** to insert the grid to the design area, as shown in the following illustration.



Note the following about a layout grid:

- The grid is created with equidistant columns, and the row size defaults to a minimum of one row of text.
- Although Font properties are not enabled for a layout grid cell (set font properties using the individual component properties), the background color and border properties are enabled.



- When you insert a component to a grid cell, it automatically resizes to accommodate the component.
- Adjust the column width and height by either positioning the mouse pointer over the border and dragging the blue bar, or by changing the grid column properties in the Properties pane.
- The grid supports merging of cells.
- You can insert a grid inside a grid.
- Similar to Microsoft Word, the grid uses a flow layout that is very convenient for designing business documents. Components that do not occupy a full paragraph or block are positioned top-down and left to right.

## Add a Border or Background Color

By default, the gridlines are displayed in the design area only and are not shown during runtime. If you want to display the gridlines in the finished report, then select the grid cell and click the **Set Border** command button to launch the Border dialog.

- To add a background color to a cell, click the **Background Color** command button to launch the Color Picker.

## About the Insert Options

When you insert a layout grid, you can add additional rows or columns.

Select the layout grid cell that is the focal point, then click the appropriate command button:

- Add a Row above
- Add a Column to the right
- Add a Row below
- Add a Column to the left

## About the Join and Unjoin Options

You can join cells or remove joins on cells.

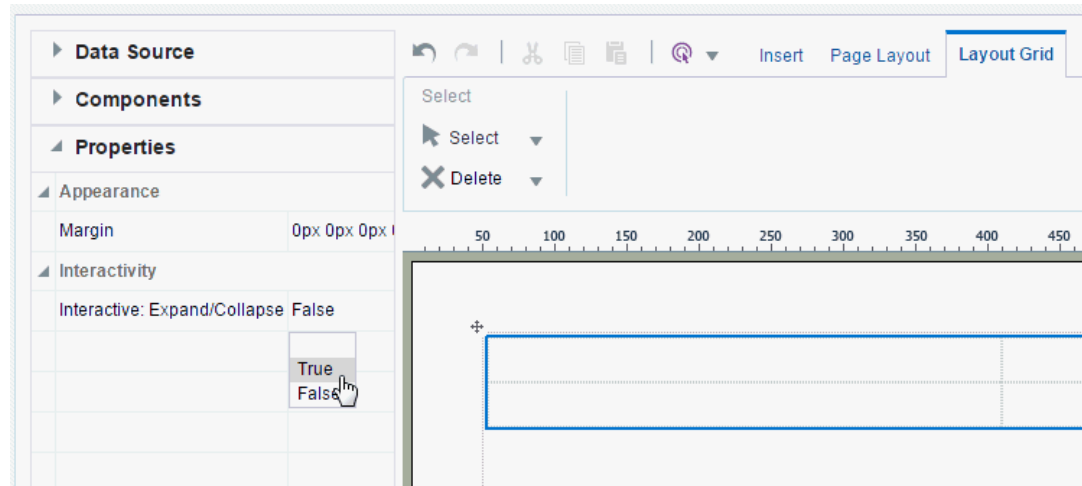
To join cells or remove joins on cells:

1. To join cells:
  - a. Select multiple adjacent cells by holding down the Ctrl key and clicking each grid cell.
  - b. Click the **Join** command button.
2. To remove joins on cells, select the joined cell, and click the **Unjoin** button.

## Add Expand and Collapse Option

When viewing a report in interactive mode, you can expand and collapse a layout grid to toggle the display of the grid's contents. Expand and Collapse are supported at the grid level, (not the cell-level) therefore ensure to insert grids appropriately. For example, if the report contains a chart in the top portion of the layout and a table in the bottom and you want to collapse the chart display, you must insert one layout grid to contain the chart and a second layout grid beneath the first to contain the table. Do not insert one grid with two rows.

1. Select the layout grid.
2. Open the **Properties** pane.
3. Set the **Interactive: Expand/Collapse** property to True. The following figure shows this option on the **Properties** pane.



## About Repeating Sections

Repeating sections repeat the components within the section of the layout based on the occurrence of an element in the data. Repeating sections are used to create classic banded reports, as well as repeating pages or sections for different data elements such as Group Above/Outline.

1. Drag and drop the repeating section component to the layout.
2. In the Repeating Section dialog, select one of the following:
  - **Element** - Specify the element for which the section repeats. For example, if the dataset contains sales information for several countries. If you select COUNTRY as the repeat-by element, then the section of the layout repeats for each unique country occurring in the dataset.
  - **Group Detail** - If you have nested sections, then select this option. To continue the previous example, assuming there're unique data rows for each city and grouping by country, then this option creates a section that repeats for each city.

The following figure shows a layout with a repeating section defined for the element **Department**. Within the repeating section are a chart that shows salaries by manager and a table that shows all employee salaries. So for each occurrence of department in the dataset, the chart and table are repeated.

Salary Details			
Start Grouping - Department Name			
Department	Department		
Manager	Full Name	Title	Annual Salary
Kevin Mourgos	Donald O'Connell	Shipping Clerk	\$31,200
	Douglas Grant	Shipping Clerk	\$31,200
	Trenna Rajs	Stock Clerk	\$42,000
	Curtis Davies	Stock Clerk	\$37,200
	Randall Matos	Stock Clerk	\$31,200
	Peter Vargas	Stock Clerk	\$30,000
	Alana Walsh	Shipping Clerk	\$37,200
	Kevin Feeney	Shipping Clerk	\$36,000
Neena Kochhar	Jennifer Whalen	Administration Assistant	\$52,800
	Susan Mavris	Human Resources Representative	\$78,000
			\$7,924,800
End Grouping - Department Name			

## Set Page Break Options for a Repeating Section

By default, for paginated output types, the page breaks automatically according to the amount of content that fits on a page.

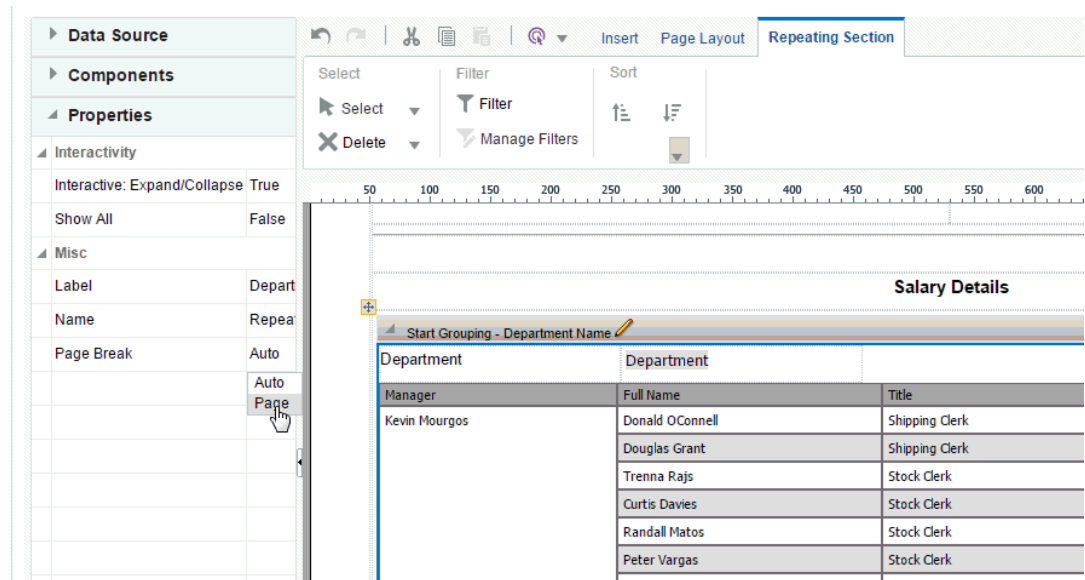
You typically have the report break after each occurrence of the repeated content.

Using the preceding example, in the PDF output you typically want to break after each department.

To create a break in the report after each occurrence of the repeating section:

1. Select the repeating section component.
2. Open the Properties pane.
3. Set the **Page Break** property to **Page**.

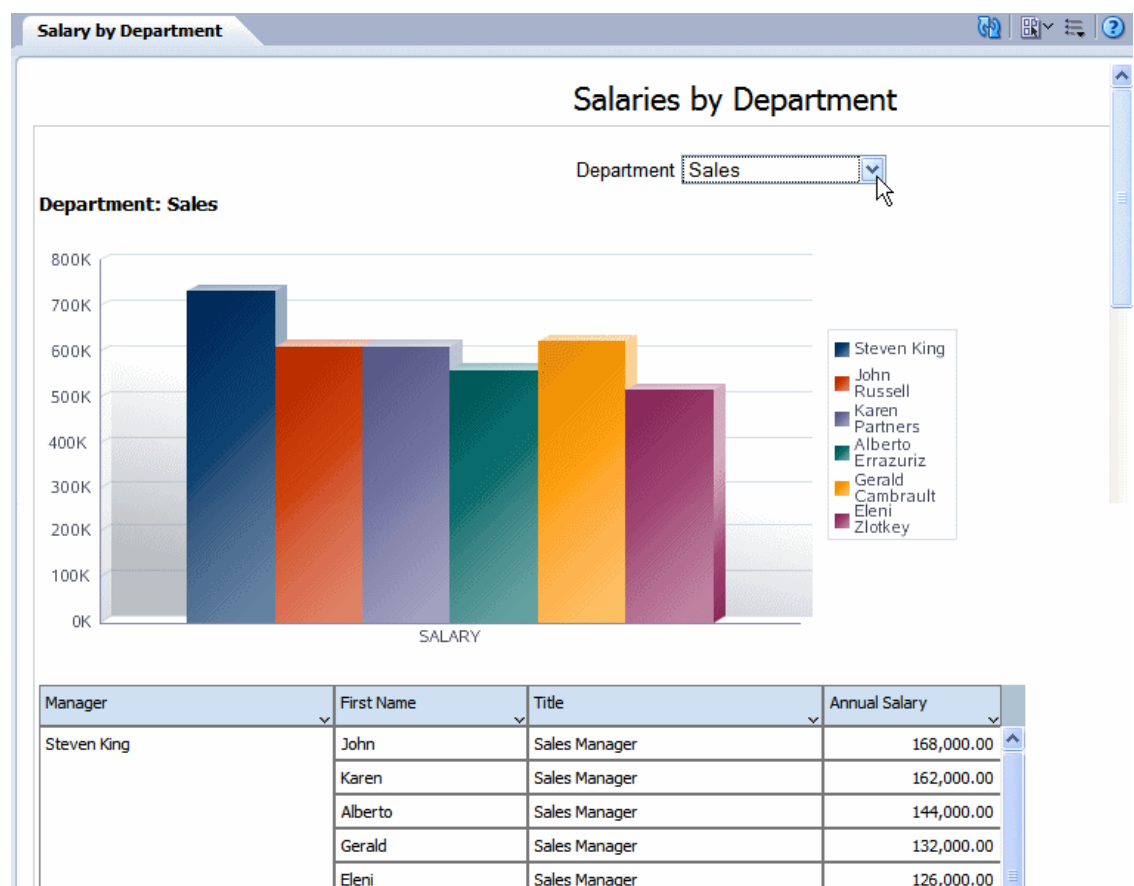
The following illustration shows the Properties for a repeating section.



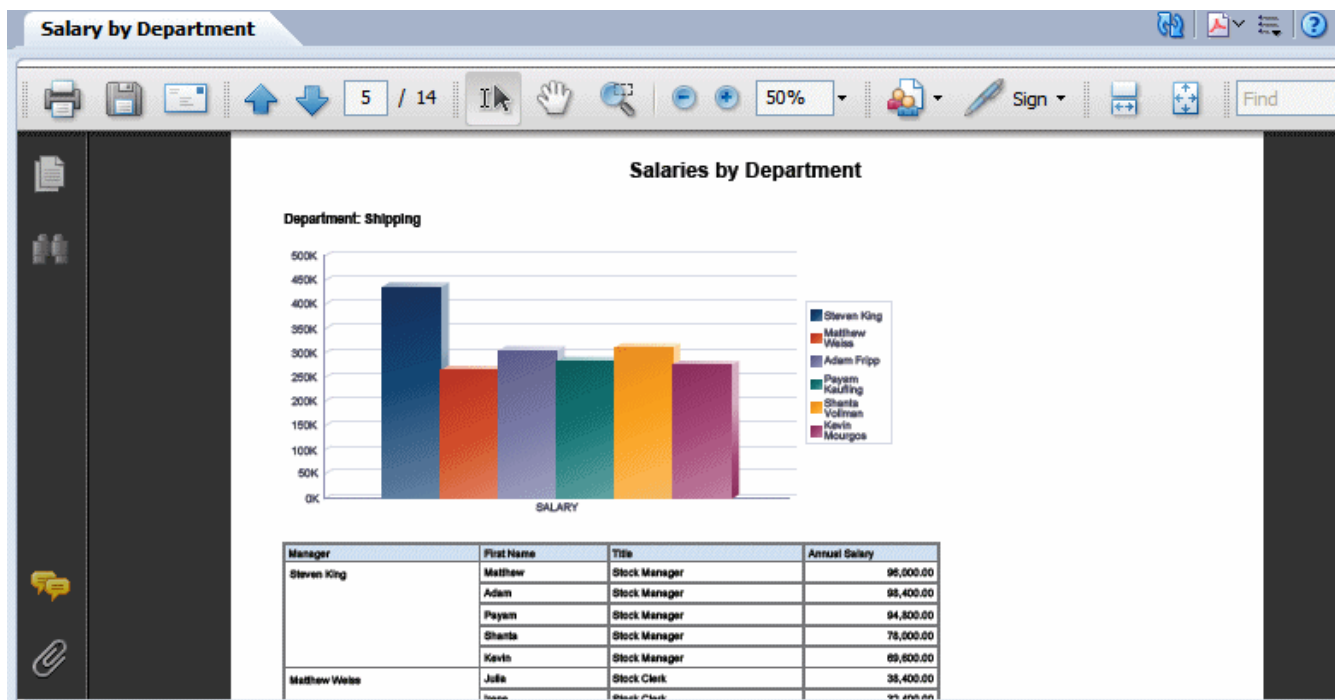
## How Repeating Sections Display in Interactive Mode

In interactive mode, the values for the repeat by element are displayed as a list of values. This enables the report consumer to dynamically select and view the results.

The following figure shows the repeat by element Department displayed in a list of values:



By contrast, the below figure shows the same layout displayed in PDF. In this example the page break option is set so that each new department begins the repeating section on a new page.



## Show All Values in a Repeating Section

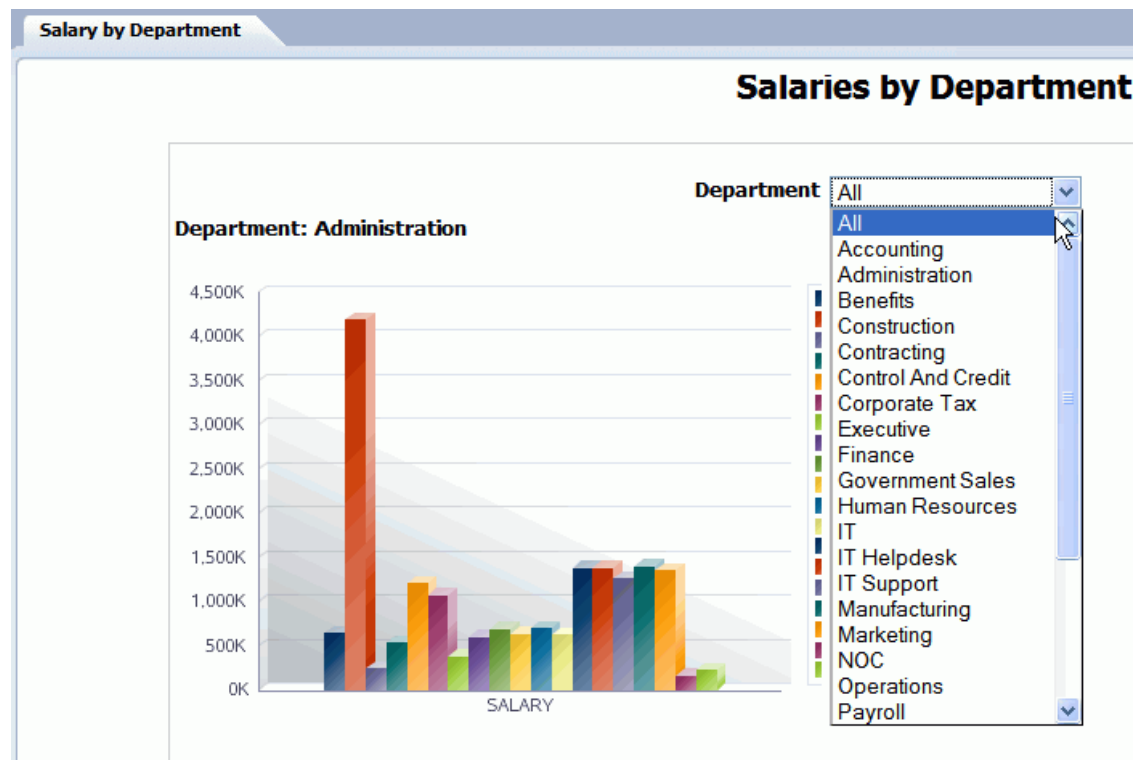
You can view all the values in a repeating section.

In interactive mode, the values for the repeat by element are displayed as a list of values. By default, this list includes only the values present for the element in the data. Therefore, a report consumer can view results for only one item at a time.

To enable a report consumer to view the results in the repeating section for all values of the element, the Repeating Section component provides the property: Show All. When this property is set to true, the value "All" is added to the list to enable the display of results for all values.

1. Select the repeating section component.
2. Open the **Properties** pane.
3. Set the **Show All** property to **True**.

When you view the report, the option All is added to the menu of values, as shown in the following illustration.



## About Data Tables

The data table is a standard table that is shown in many layouts. It contains a header, data columns, and a total row. The table supports "group left" functionality (outlines) that merges fields with the same values as well as subtotals, grand totals, custom calculations, and running totals.

Once inserted, you can edit the table properties using the dynamic tabs or the **Properties** pane. The following dynamic tabs are available for the table components:

- Table
- Table Column Header
- Column
- Total Cell

This section contains the following topics about working with tables:

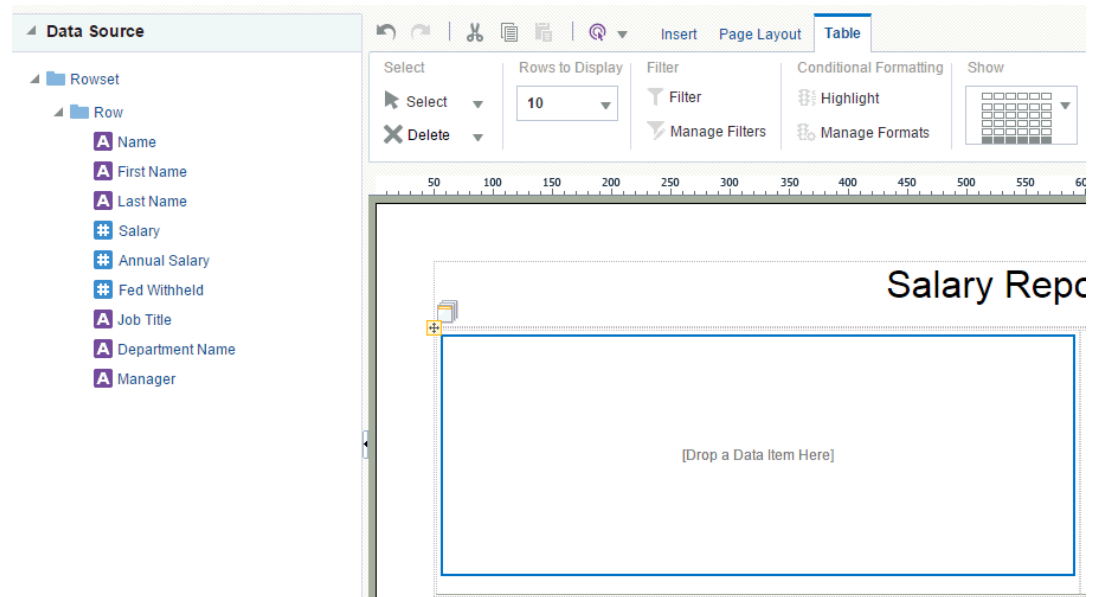
- [Insert a Data Table](#)
- [Set Alternating Row Colors](#)
- [About the Table Tab](#)
- [About the Table Column Header Tab](#)
- [About the Column Tab](#)
- [About the Total Cell Tab](#)
- [Insert Dynamic Hyperlinks](#)

## Insert a Data Table

You can insert a data table and to add data columns to the table.

1. From the **Insert** tab, select and drag the **Data Table** component to the design area.

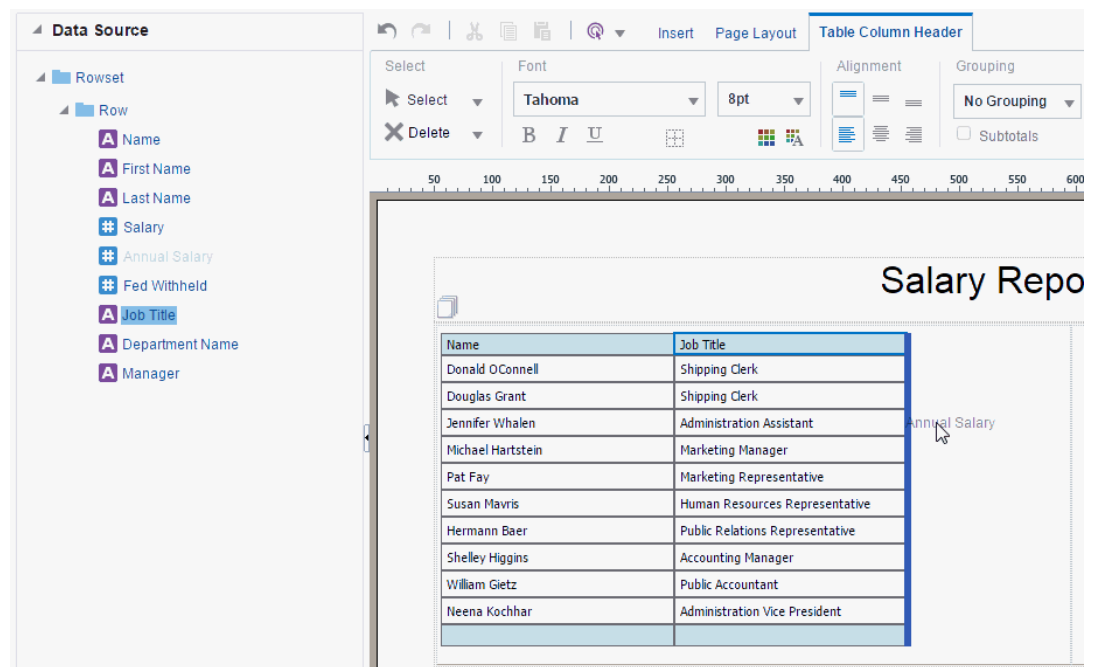
The following figure shows an example of an inserted, empty data table. Notice that the **Table** tab is now displayed.



2. To add data columns to the table, select an element from the Data Source pane and drag it to the table in the layout.

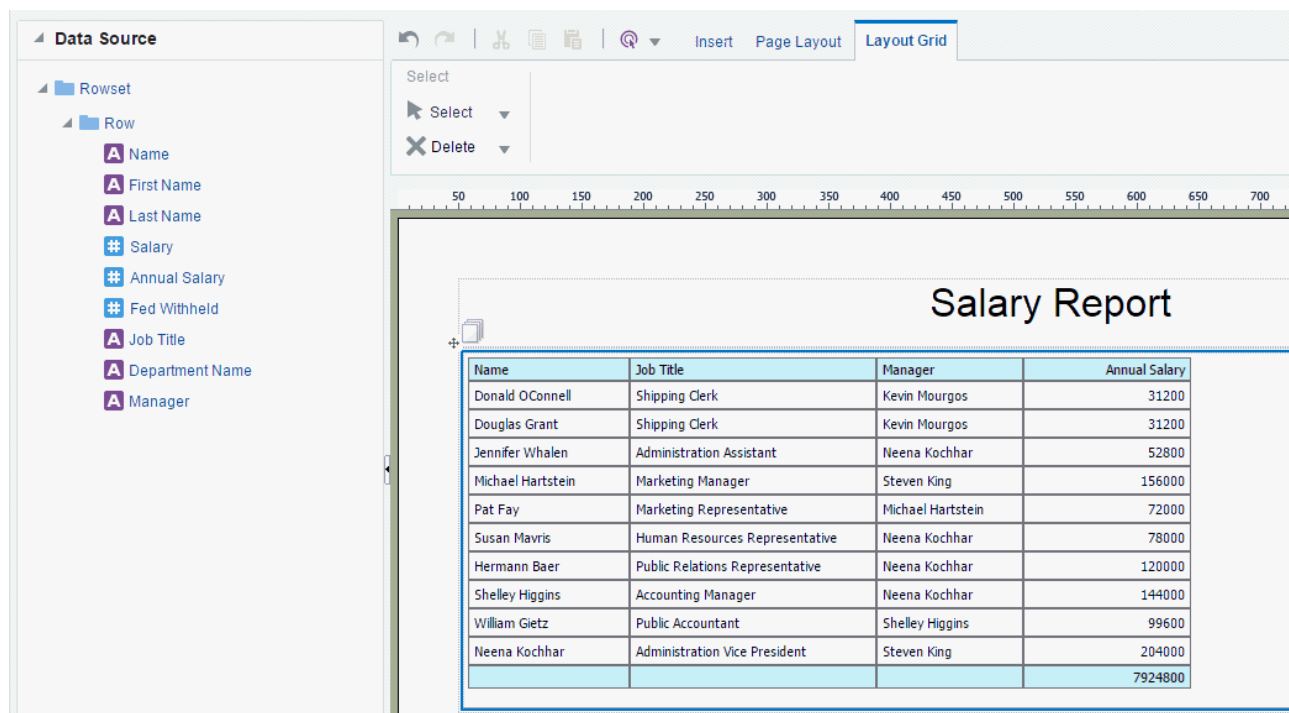
You cannot include elements from multiple data models in report components unless the data models are linked.

The following figure shows the columns being added to the table. Notice that when you drop a column on the table the sample data is immediately displayed.



- Continue to drag the elements from the Data Source pane to form the columns of the table. If you must reposition a column that you've already added, then select it and drag it to the correct position.

The following figure shows a completed data table:



Notice the following default behavior:

- A total row is automatically inserted. By default it calculates the sum of the items in the column. You can remove this row or edit the display and calculation applied.



- Default date formatting is applied.
- Default number formatting and alignment is applied.

## Set Alternating Row Colors

Some data tables are easier to read when the rows display alternating colors.

An example of alternating colors is shown in the following illustration.

Last Name	Title	Manager	Department	Monthly_Salary	Annual_Salary
Kochhar	Administration Vice President	Steven King	Executive	17000	204,000.00
De Haan	Administration Vice President	Steven King	Executive	17000	204,000.00
Hunold	Programmer	Lex De Haan	IT	9000	108,000.00
Emst	Programmer	Alexander Hunold	IT	6000	72,000.00
Austin	Programmer	Alexander Hunold	IT	4800	57,600.00
Pataballa	Programmer	Alexander Hunold	IT	4800	57,600.00
Lorentz	Programmer	Alexander Hunold	IT	4200	50,400.00
Greenberg	Finance Manager	Neena Kochhar	Finance	12000	144,000.00
Faviet	Accountant	Nancy Greenberg	Finance	9000	108,000.00
Chen	Accountant	Nancy Greenberg	Finance	8200	98,400.00
Sciarra	Accountant	Nancy Greenberg	Finance	7700	92,400.00

To set an alternating row color:

1. Select the table.
2. Open the **Properties** pane.
3. Click the value shown for **Alternate Row Color** to launch the color picker. The following illustration shows the **Alternate Row Color** option.

The screenshot shows the Oracle Analytics Server interface. On the left, the 'Properties' pane is open, showing the 'Misc' section. The 'Alternate Row Color' property is selected, and a hand cursor is pointing at it. The main area displays a 'Salary Report' table with alternating row colors. The table has the following data:

Name	Job Title	Manager	Annual Salary
Donald O'Connell	Shipping Clerk	Kevin Mourgos	31200
Douglas Grant	Shipping Clerk	Kevin Mourgos	31200
Jennifer Whalen	Administration Assistant	Neena Kochhar	52800
Michael Hartstein	Marketing Manager	Steven King	156000
Pat Fay	Marketing Representative	Michael Hartstein	72000
Susan Mavris	Human Resources Representative	Neena Kochhar	78000
Hermann Baer	Public Relations Representative	Neena Kochhar	120000
Shelley Higgins	Accounting Manager	Neena Kochhar	144000
William Gietz	Public Accountant	Shelley Higgins	99600
Neena Kochhar	Administration Vice President	Steven King	204000
			7924800

4. Choose a color and click **OK**.

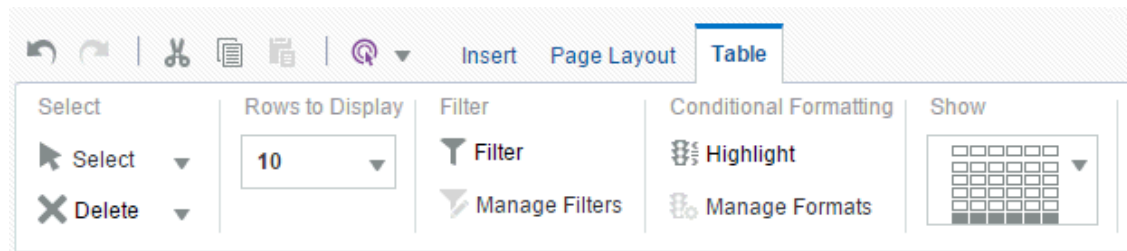
## About the Table Tab

The **Table** tab defines the functions that you can perform to display a table in a customized manner.

The **Table** tab enables you to perform the following:

- Set the number of rows displayed
- Define filters for the data displayed in the table
- Define conditions and formats to apply to rows that meet the conditions
- Show or hide the total row for the table

The following figure shows the **Table** tab.



## Set the Rows to Display Option

The **Rows to Display** property controls the number of rows of data displayed

The property is set as follows:

- When designing the layout, this property sets the number of rows that are displayed for the table within the layout editor.
- When viewing this layout in the report viewer in interactive mode, this property sets the size of the scrollable region for the table.

The default is 10 rows of data. You can select 10, 20, 30, 40, or All rows of data to be displayed. To set a custom value, open the **Properties** pane and enter the custom value for the **Rows to Display** property.

### Note

Displaying more rows of data can impact the performance of the Layout Editor.

## About Filters

A filter refines the displayed items by a condition. This is a powerful feature that enables you to display only desired elements in the table in an interactive output without having to perform additional coding.

For example, you could add a filter to meet some of the following report conditions:

- Display only the top 10 salaries
- Display only the bottom 25 store sales
- Display only employees in the IT department
- Display only sales that are between \$10,000 and \$20,000 and in the Southern region

You can add multiple filters and manage the order in which they're applied to the table data.

## Set Filters for a Table

You can use a filter to narrow table results.

To set a filter:

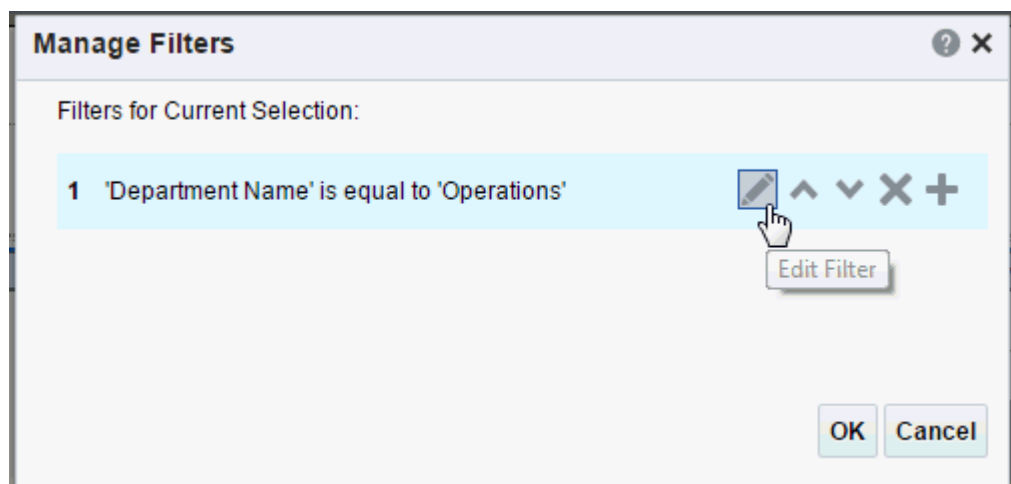
1. Click the **Filter** toolbar button.
2. Select a **Data Field** to filter by specific data elements. All elements are available regardless of whether they're included as table columns.
3. Select an **Operator** to filter by these operators: is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, is between, is in top, is in bottom.
4. Add a **Value** appropriate for the operator selected. The value can be either a text entry, or an element from the data.

## Manage Filters

After you've added filters, use the Manage Filters feature to edit, delete, or change the order that the filters are applied.

To manage filters:

1. Click the **Manage Filters** toolbar button to launch the Manage Filters dialog, as shown in the following illustration.



2. Hover the cursor over the filter to display the actions toolbar. Use the toolbar buttons to edit the filter, move the filter up or down in the order of application, delete, or add another filter.

## About Conditional Formats

A conditional format changes the formatting of an element in the table based on a condition.

This feature is extremely useful for highlighting target ranges of values in the table. For example, you could create a set of conditional formats for the table that display rows in different colors depending on threshold values.

## Apply Conditional Formats to a Table

You can apply conditional formats to a table.

1. Click the **Highlight** button.

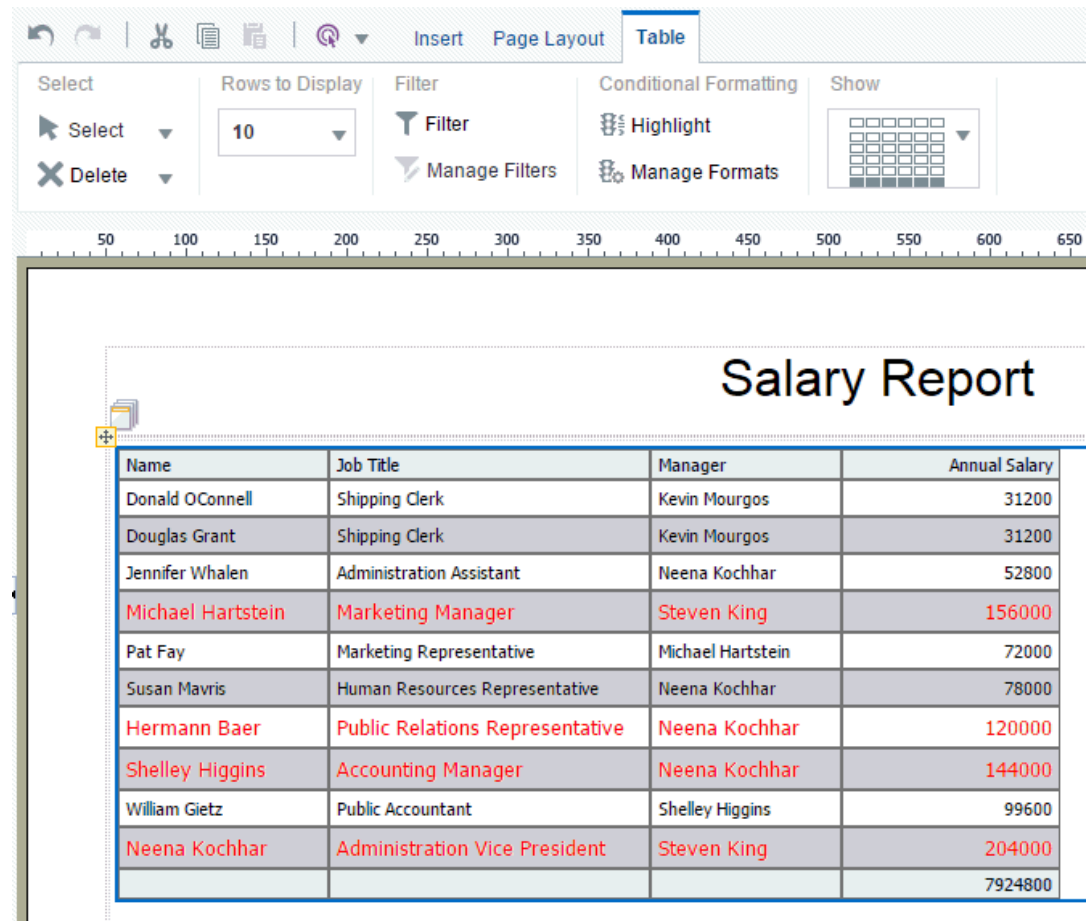
This launches the Highlight dialog, as shown in the following figure.

2. Select a **Data Field** to create a condition for a data field. All elements are available regardless of whether they're included as table columns. For example, you may want to highlight in red all employees with salaries greater than \$10,000, but not actually include the salary element in the table.
3. Select an **Operator** to create a conditional format by these operators: is equal to, is not equal to, is less than, is greater than, is less than or equal to, is greater than or equal to, is between, is in top, is in bottom.
4. Add a **Value** appropriate for the operator selected. The value can be either a text entry, or an element from the data.

If entering a date value, use one of the following XSL date or time formats: YYYY-MM-DD or YYYY-MM-DDTHH:MM:SS.

5. Select a **Font Family** to apply to the row of data that meets the condition. You can also apply bold, italic, or underline emphasis.
6. Select the **Size** of the font to apply to the row of data that meets the condition.
7. Click **Color** to open the **Color Picker**. Choose one of the predefined colors or click **Custom Color** to define a color to apply to the font.
8. Click **Background Color** to open the **Color Picker**. Choose one of the predefined colors or click **Custom Color** to define the background color to apply to the row.

The following figure shows the table in the layout with the condition applied.



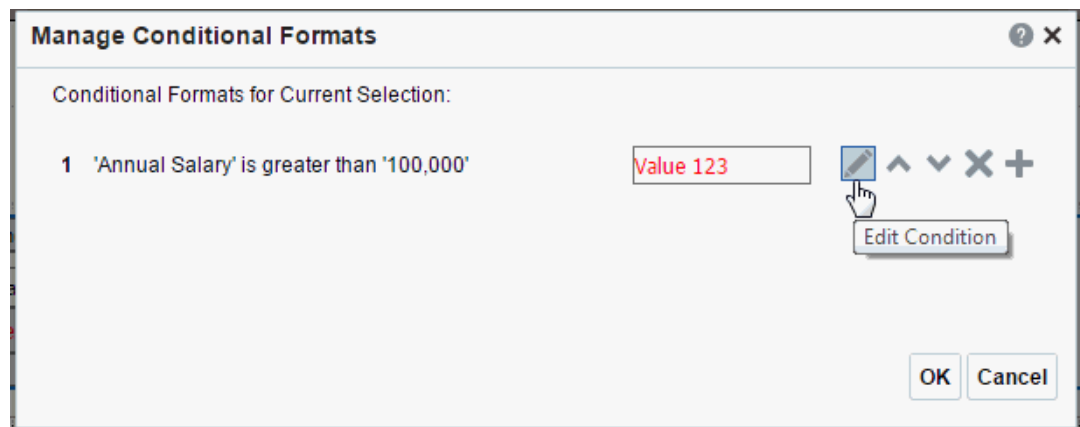
Name	Job Title	Manager	Annual Salary
Donald OConnell	Shipping Clerk	Kevin Mourgos	31200
Douglas Grant	Shipping Clerk	Kevin Mourgos	31200
Jennifer Whalen	Administration Assistant	Neena Kochhar	52800
Michael Hartstein	Marketing Manager	Steven King	156000
Pat Fay	Marketing Representative	Michael Hartstein	72000
Susan Mavris	Human Resources Representative	Neena Kochhar	78000
Hermann Baer	Public Relations Representative	Neena Kochhar	120000
Shelley Higgins	Accounting Manager	Neena Kochhar	144000
William Gietz	Public Accountant	Shelley Higgins	99600
Neena Kochhar	Administration Vice President	Steven King	204000
			7924800

## Manage Formats

After you've added conditional formats, use the **Manage Formats** command to edit or delete a format.

To manage formats:

1. Click the **Manage Formats** button to launch the Manage Conditional Formats dialog, as shown in the following illustration.

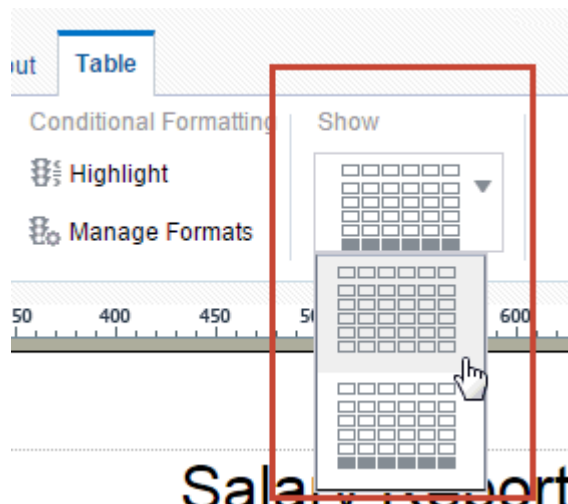


2. Hover the cursor over an item to display the actions toolbar. Use the toolbar buttons to edit the format, move the format up or down in the order of application, delete, or add another format. The order of the conditions is important because only the first condition that is met is applied.

## Control the Display of the Total Row

By default, the layout editor inserts a total row in a table that sums numeric columns. To remove the total row, click the **Show** menu and select the table view without the highlighted total row.

The following figure shows the **Show** menu options:

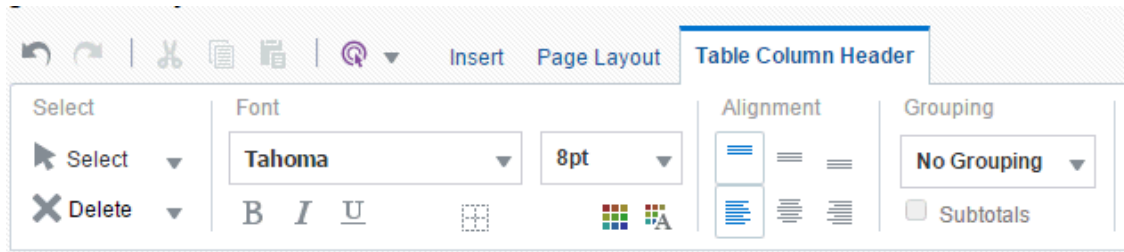


The total row can be further customized using the **Total Cell** tab and the **Properties** pane.

## About the Table Column Header Tab

The **Table Column Header** tab defines the functions that you can perform.

The following figure shows the **Table Column Header** tab.



The **Table Column Header** tab enables you to perform the following:

- Edit the font properties of the table header column
- Edit the cell properties of the table header including border weight, style, and color and background fill color
- Set the vertical and horizontal alignment of the table header
- Apply grouping

## About Grouping

"Grouping" groups together elements in the data of the same value. In a table, applying grouping can make the table easier to read.

The Grouping option enables you to choose between "Group Left" or "Group Above". Group left maintains the "group by" element within the table. The following figure shows a table that has been grouped by Manager using **Group Left**.

Manager	Name	Job Title	Annual Salary
Kevin Mourgos	Donald OConnell	Shipping Clerk	31200
	Douglas Grant	Shipping Clerk	31200
	Trenna Rajs	Stock Clerk	42000
	Curtis Davies	Stock Clerk	37200
	Randall Matos	Stock Clerk	31200
	Peter Vargas	Stock Clerk	30000
	Alana Walsh	Shipping Clerk	37200
	Kevin Feeney	Shipping Clerk	36000
Neena Kochhar	Jennifer Whalen	Administration Assistant	52800
	Susan Mavris	Human Resources Representative	78000
			7924800

Group above inserts a Repeating Section component, and extracts the grouping element from the table. The grouping element is instead displayed above the table and a separate table is displayed for each occurrence of the grouping element. The following figure shows a table that has been grouped by Manager using **Group Above**.

**Manager Zlotkey**

Employee	Title	Hire Date	SALARY
Abel	Sales Representative	May 10, 1996	11,000.00
Hutton	Sales Representative	Mar 18, 1997	8,800.00
Johnson	Sales Representative	Jan 03, 2000	6,200.00
Livingston	Sales Representative	Apr 22, 1998	8,400.00
Taylor	Sales Representative	Mar 23, 1998	8,600.00
		Grand Total	43,000.00

**Manager Weiss**

Employee	Title	Hire Date	SALARY
Fleur	Shipping Clerk	Feb 22, 1998	3,100.00
Geoni	Shipping Clerk	Feb 02, 2000	2,800.00
Landry	Stock Clerk	Jan 13, 1999	2,400.00
Markle	Stock Clerk	Mar 07, 2000	2,200.00
Mikkilineni	Stock Clerk	Sep 27, 1998	2,700.00
Nayer	Stock Clerk	Jul 15, 1997	3,200.00
		Grand Total	22,100.00

**Manager Vollman**

Employee	Title	Hire Date	SALARY
Bell	Shipping Clerk	Feb 03, 1996	4,000.00
Everett	Shipping Clerk	Mar 02, 1997	3,900.00

## Example: Group Left

The illustration here shows an example where the table data has been grouped by the elements of the first two columns, Manager and Title.

Notice that there's only one entry per manager name and one entry for each job title under that manager name. This organizes the data rows more cleanly in the table.



Manager	Job Title	Name	Annual Salary
Kevin Mourgos	Shipping Clerk	Donald OConnell	31200
		Douglas Grant	31200
		Alana Walsh	37200
		Kevin Feeney	36000
	Stock Clerk	Trenna Rajs	42000
		Curtis Davies	37200
		Randall Matos	31200
		Peter Vargas	30000
Neena Kochhar	Administration Assistant	Jennifer Whalen	52800
	Human Resources Representative	Susan Mavris	78000
			7924800

## Apply Subtotals

To further enhance a table, you can add a subtotal row to display for each grouped occurrence of the element.

## Example: Group Above

The illustration here shows an example where the table data has been grouped by Manager.

Notice that in the design pane, the Data Table component has been replaced with a Repeating Element component that contains the data table. The Manager element is inserted above the table with a label.

Start Grouping - Manager		
Manager	Manager	
Job Title	Name	Annual Salary
Shipping Clerk	Donald OConnell	31200
	Douglas Grant	31200
	Winston Taylor	38400
	Jean Fleaur	37200
	Martha Sullivan	30000
	Girard Geoni	33600
	Nandita Sarchand	50400
	Alexis Bull	49200
	Julia Dellinger	40800
	Anthony Cabrio	36000
		7924800
End Grouping - Manager		

The label is a text item. Edit the text by double-clicking the item to select it, then single-clicking to edit.

When you run the report, a separate table is created for each occurrence of the grouping element. In Interactive output mode, the grouping element displayed at the top of the table is displayed as a filter. Select the value that you want to view from the list, as shown in the below figure:

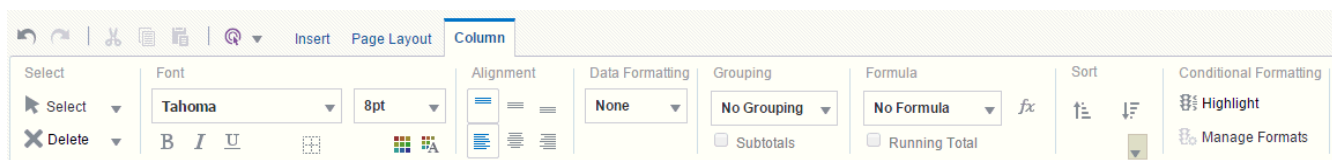
## Salary Report

Manager			Manager
Adam Fripp			Adam Fripp ▼
Job Title	Name		Adam Fripp
Stock Clerk	Laura Bissot		Alberto Errazuriz
	Mozhe Atkinson		Alexander Hunold
	James Marlow		Den Raphaely
	TJ Olson		Eleni Zlotkey
Shipping Clerk	Nandita Sarchand		Gerald Cambrault
	Alexis Bull		John Russell
	Julia Dellinger		Karen Partners
	Anthony Cabrio		Kevin Mourgous
			Lex De Haan
			Matthew Weiss
			Michael Hartstein
			Nancy Greenberg
			Neena Kochhar
			Payam Kaufling
			Shanta Vollman
			Shelley Higgins
			Steven King

Percentage Salary by Department

## About the Column Tab

The **Column** tab is enabled when you select a specific column in a table. You can edit font and cell properties and apply them.



The **Column** tab allows you to perform the following actions:

- Edit the font properties of the column including style, size, and color
- Edit the cell properties of the column including border weight, style, and color and background fill color
- Set the vertical and horizontal alignment of the column contents

- Apply formatting to the column data (options depend on the data type)
- Apply grouping
- Apply a running total (or other formula) to the data
- Apply sorting and sort precedence
- Apply conditional formatting to the column

## About the Data Formatting Options for Columns

The options available from the **Data Formatting** region of the tab depend on the data type of the column selected. The tab provides common options to choose from.

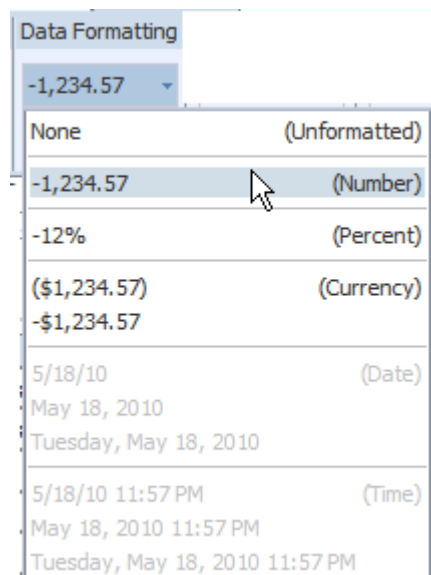
If an option isn't listed, you can enter a custom Oracle or Microsoft formatting mask in the **Properties** pane. You can also set a formatting mask dynamically by including the mask as an element in your data. These features are described in the following sections:

- [Apply Formatting to Numeric Data Columns](#)
- [Apply Formatting to Date Type Data Columns](#)
- [Custom and Dynamic Formatting Masks](#)

## Apply Formatting to Numeric Data Columns

Follow these formatting options if the column contains numeric data.

- **Format** - Select one of the common number formats from the list. The format is applied immediately to the table column. The formats are categorized by Number, Percent, and Currency, as shown in the following figure:

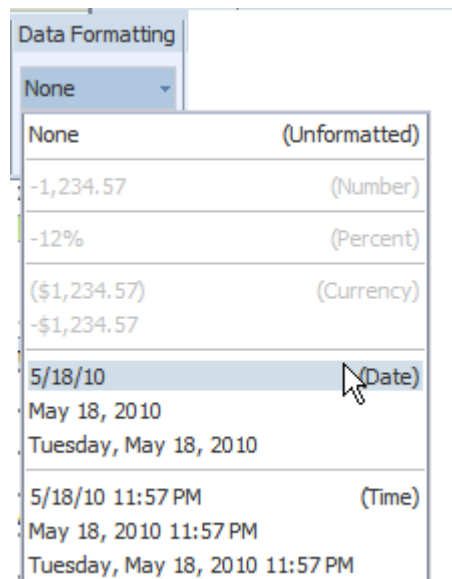


- **Decimal position** - Click the **Move Left** or **Move Right** to increase or decrease the decimal positions displayed.
- **Show/Hide Grouping Separator** - Click this button to hide the grouping separator (for example, 1,234.00 displays as 1234.00). To show the grouping separator, click the button again.

## Apply Formatting to Date Type Data Columns

Use these formatting options if the column contains dates.

- **Format** - Select one of the common date formats from the list. The format is applied immediately to the table column. The formats are categorized by Date and Time, as shown in the following figure:



## Custom and Dynamic Formatting Masks

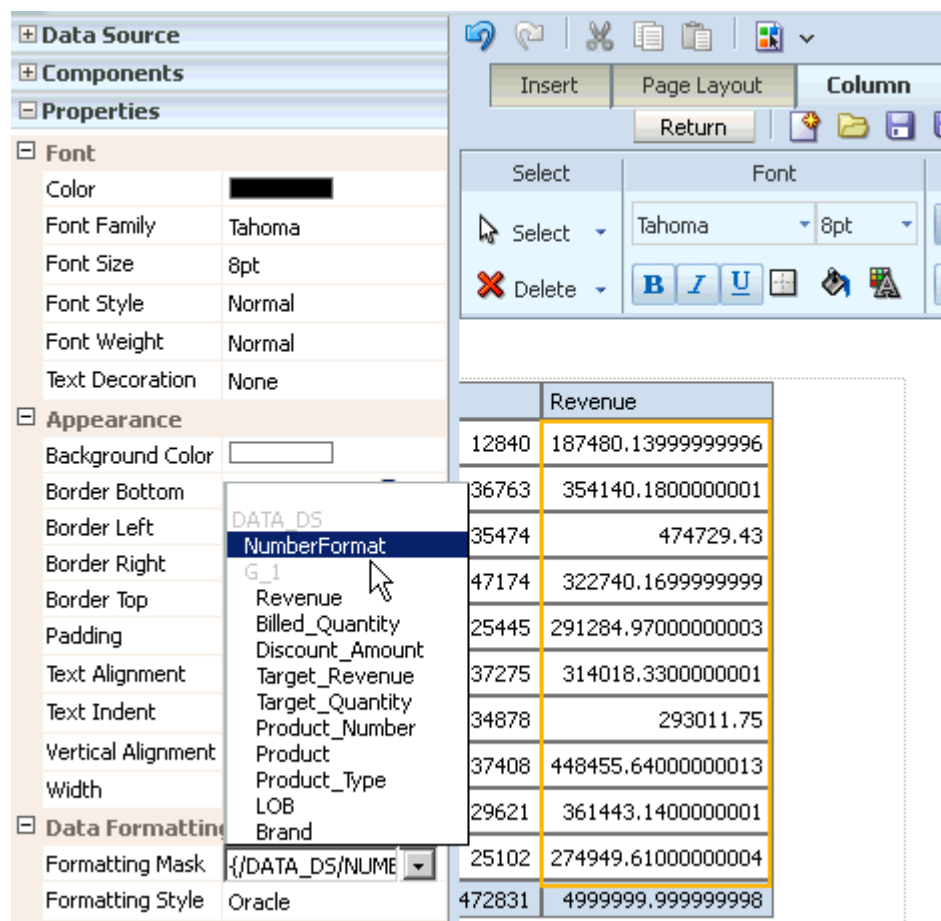
You can apply any Microsoft or Oracle (recommended) format mask to a report data field. You can manually enter the mask in the Formatting Mask property on the **Properties** pane.

**To enter a custom data formatting mask:**

1. Select the data column or field in the layout.
2. On the **Properties** pane, under the **Data Formatting** group select the **Formatting Style**. Supported styles are Oracle and Microsoft.
3. In the **Formatting Mask** field, manually enter the format mask to apply.

Formatting masks can also be applied dynamically by either including the mask in a data element of your report data, or as a parameter to the report. The mask is passed to the layout editor based on the value of the data element.

To enter a dynamic formatting mask, in the **Formatting Mask** field, choose the data element that defines the formatting mask. The following figure shows an example of setting a dynamic number format mask. For this example, a parameter called NumberFormat prompts the user to define a format mask when the report is submitted. The value is passed to the Formatting Mask property and applied to the data field in the layout.



If you use a parameter to pass the format mask ensure that you select the **Include Parameter Tags** option on the data model Properties page.

## About the Formula Option

The options available from the **Formula** region of the **Column** tab depend on the data type of the column.

For more information about applying formulas, see [Set Predefined or Custom Formulas](#).

## About the Sort Option

To sort the data in a column, select the column, then under the **Sort** group click **Ascending Order** or **Descending Order**.

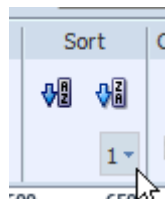
To sort by more than one column, select the column, the sort order, and then assign a Priority to each column. The priority list is a list of values beneath the sort order commands.

For example, in the employee salary table shown in the following figure, assume you want to sort ascending first by **Title** then sort descending by **Annual Salary**:

Name	Hire Date	Title	Annual Salary
Neena Kochhar	9/21/89	Administration Vice President	\$204,000.00
Lex De Haan	1/13/93	Administration Vice President	\$204,000.00
Alexander Hunold	1/3/90	Programmer	\$108,000.00
Bruce Ernst	5/21/91	Programmer	\$72,000.00
David Austin	6/25/97	Programmer	\$57,600.00
Valli Pataballa	2/5/98	Programmer	\$57,600.00
Diana Lorentz	2/7/99	Programmer	\$50,400.00
Nancy Greenberg	8/17/94	Finance Manager	\$144,000.00
Daniel Faviet	8/16/94	Accountant	\$108,000.00
John Chen	9/28/97	Accountant	\$98,400.00
			7,411,200.00

1. Select the **Title** column.
2. On the **Column** tab, under **Sort**, click the **Ascending Order** button.
3. From the **Priority** list, select 1.

The following figure shows the **Priority** list.



4. Next select the **Annual Salary** column.
5. On the **Column** tab, under **Sort**, click the **Descending Order** button.
6. From the **Priority** list, select 2.

## Remove a Sort Order

You can remove the sorting applied to a column.

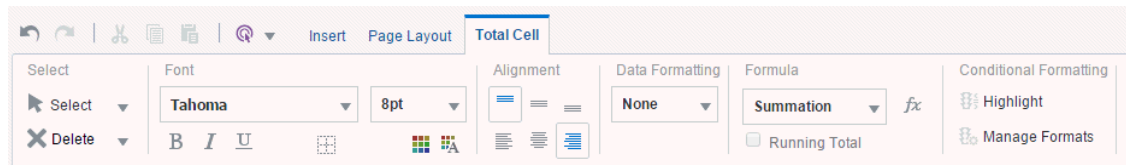
To remove a sort order applied to a column:

1. Select the column.
2. From the **Sort** region on the Column tab, click the appropriate button of the sort order that has been applied. For example, to deselect the ascending order, click the **Ascending Order** button to undo the sort.

## About the Total Cell Tab

The Layout Editor automatically inserts a grand total row when you insert a data table to the layout. As shown in the section on grouping, you can also insert subtotal rows within the table based on a grouping element.

To edit the attributes of the cells in a grand total or subtotal row, select the cell and use the options in the **Total Cell** tab shown in the following figure.



The **Total Cell** tab enables you to perform the following:

- Edit the font properties of the total cell
- Edit the cell properties of the total cell including border weight, style, and color and background fill color
- Set the vertical and horizontal alignment of the table header
- Apply formatting to the cell data
- Apply a formula to the cell
- Apply conditional formatting to the cell

## Apply Data Formatting to a Total Cell

The section talks about applying data formatting to a total cell.

See [About the Data Formatting Options for Columns](#).

## Apply a Formula

By default, the formula applied to a Total Cell within a numeric column is a sum of the column items. The Formula option enables you to apply a different formula.

Not all options available from the **Formula** region of the column tab are applicable to a Total Cell.

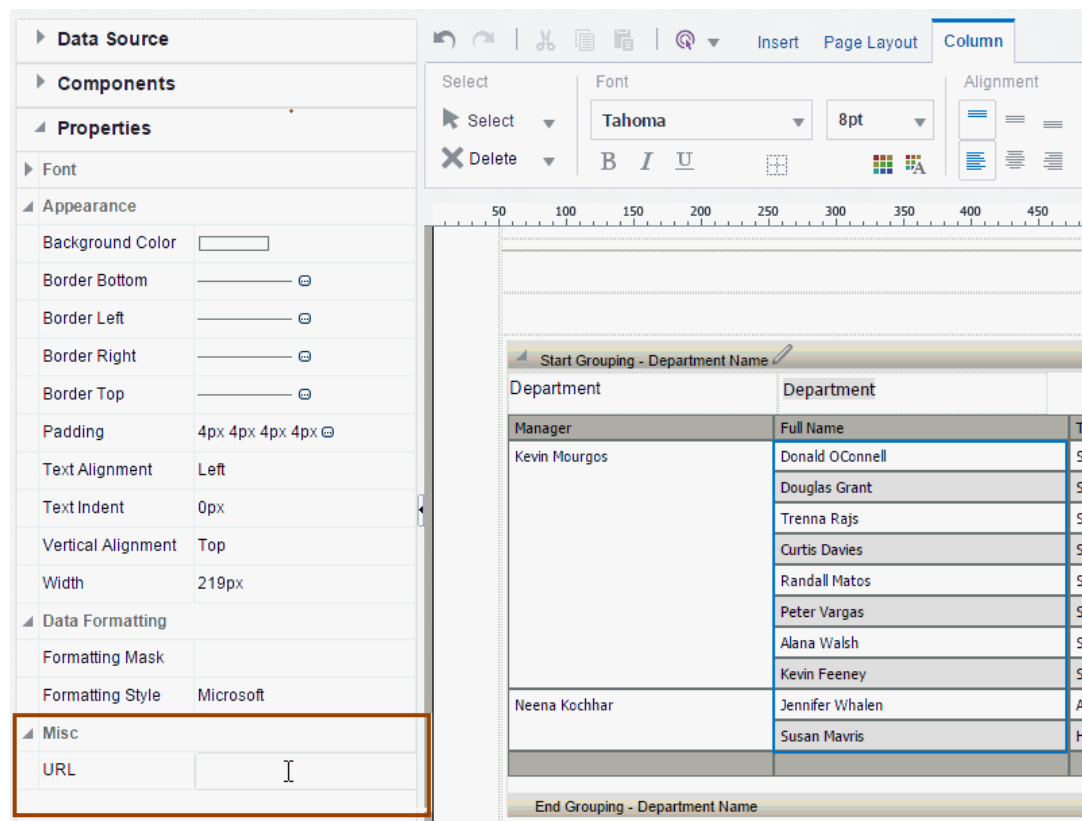
For more information about applying formulas, see [Set Predefined or Custom Formulas](#).

## Insert Dynamic Hyperlinks

The layout editor supports dynamic hyperlinks in tables.

To insert a dynamic hyperlink:

1. Select the table column.
2. Click **Properties**. The column properties include an option for URL, as shown in the following illustration.



3. In the URL field, enter the static portion of the URL and embed the absolute path to the element that provides the dynamic portion of the URL within curly braces {}. For example:

`http://example.com/show_page?id={/DATA/GROUP1/ELEMENT_NAME}`

where `http://example.com/show_page?id=` is the static portion of the URL and `{/DATA/GROUP1/ELEMENT_NAME}` is the absolute path to the element in the data that supplies the dynamic portion.

For example, in the employee salary report, suppose each employee name should render as a hyperlink to the employee's person record. Assume the static portion of the URL to each person record is

`https://people.hrserver.com/records/show_page?id=`

The dynamic portion comes from the data element `EMPLOYEE_ID`. For this example, append the full path to the `EMPLOYEE_ID` element within curly braces and enter this in the URL field as follows:

`https://people.hrserver.com/records/show_page?id={/ROWSET/ROW/EMPLOYEE_ID}`

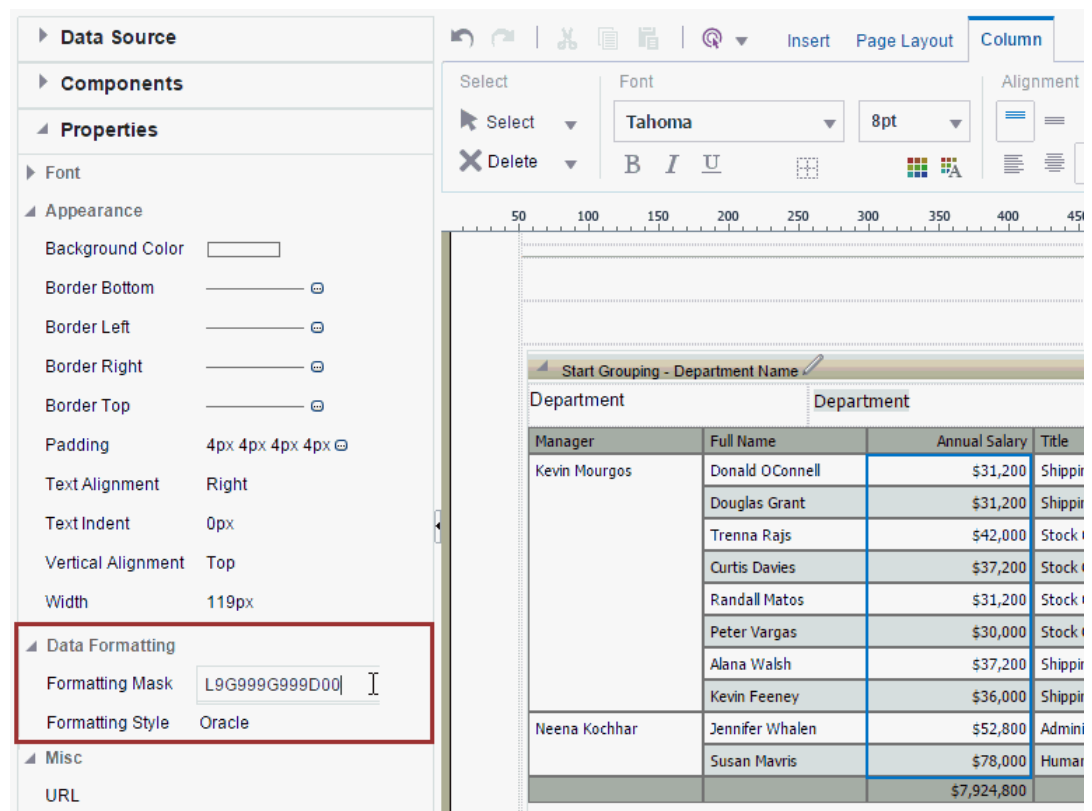
## Apply Custom Data Formatting

Publisher supports the use of the Oracle and Microsoft format masks for custom data formatting. The results of the output depends on the selected locale.

See [Use the Microsoft Number Format Mask](#) and [Use the Oracle Format Mask](#).

1. Select a data field or column.
2. Click **Properties**. The Data Formatting options are displayed as shown in the following figure:





3. From the **Formatting Style** drop-down list, select the Oracle or Microsoft formatting style. The Oracle formatting style is recommended.
4. In the **Formatting Mask** field, enter a formatting mask. For example, for a column that contains product totals, you can use the Oracle formatting style, and the 9G999D99 formatting mask to display total values with two zeros to the right of the decimal place.

## About Charts

The layout editor supports a variety of chart types and styles to graphically present data in the layout.

After you insert a chart, you can edit the chart properties using the dynamic toolbars or the **Properties** pane. The **Properties** pane extends the options from the **Chart** tab and enables you to enter very specific custom settings for the following:

- Chart Effect
- Chart Legend
- Chart Plot Area
- Chart Title
- Chart Label
- Chart Values

The following Chart Label properties apply to Scatter and Bubble chart types only: Title Font, Title Horizontal Align, Title Text, and Title Visible.

Some font effects such as underline, italic, and bold might not render in PDF output.

The text size for legends, title, and numerical values in Bar charts might be decreased in a PDF output when compared with an interactive output, because the size of the PDF page is lesser than the size of the HTML browser page used for the interactive output.

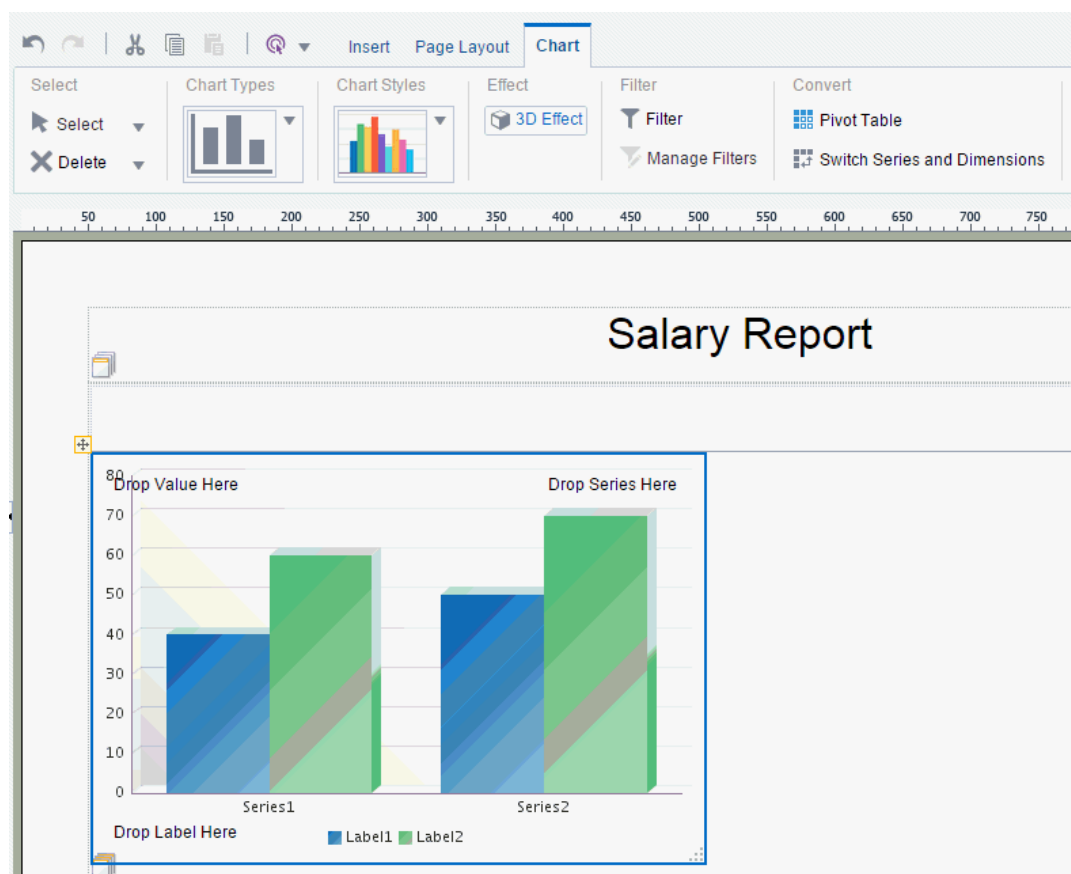
## Insert a Chart

Follow these steps to insert a chart.

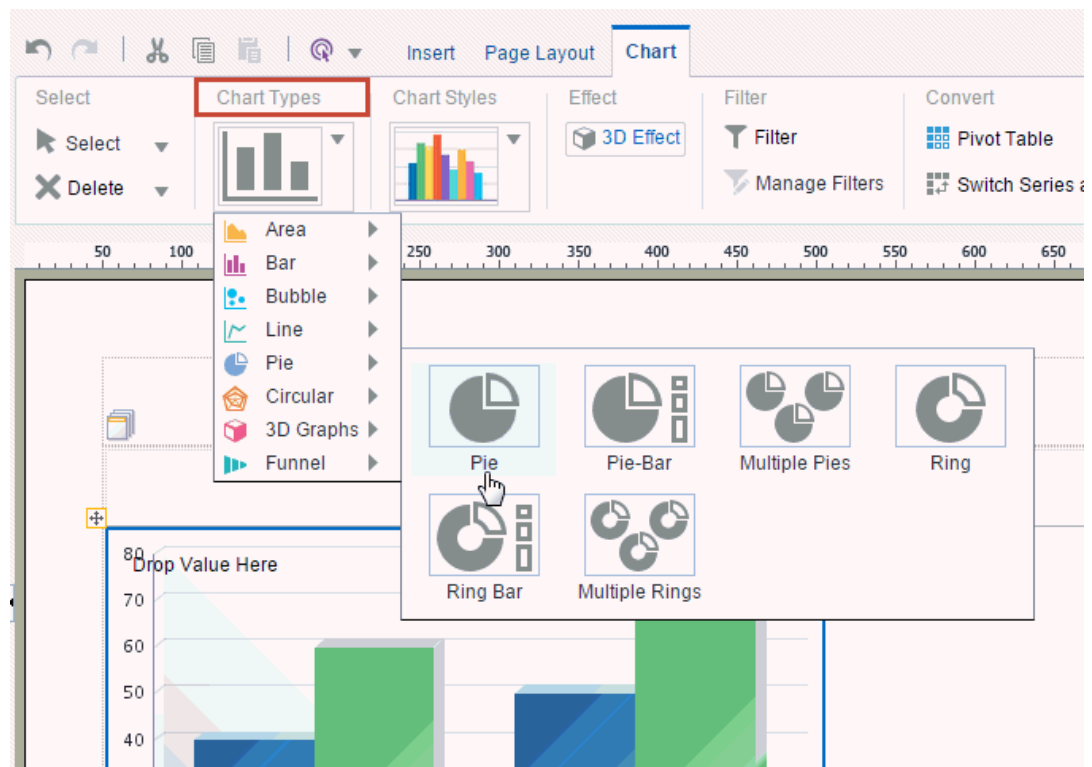
To insert a chart:

1. From the **Insert** menu, select and drag the Chart component to the layout.

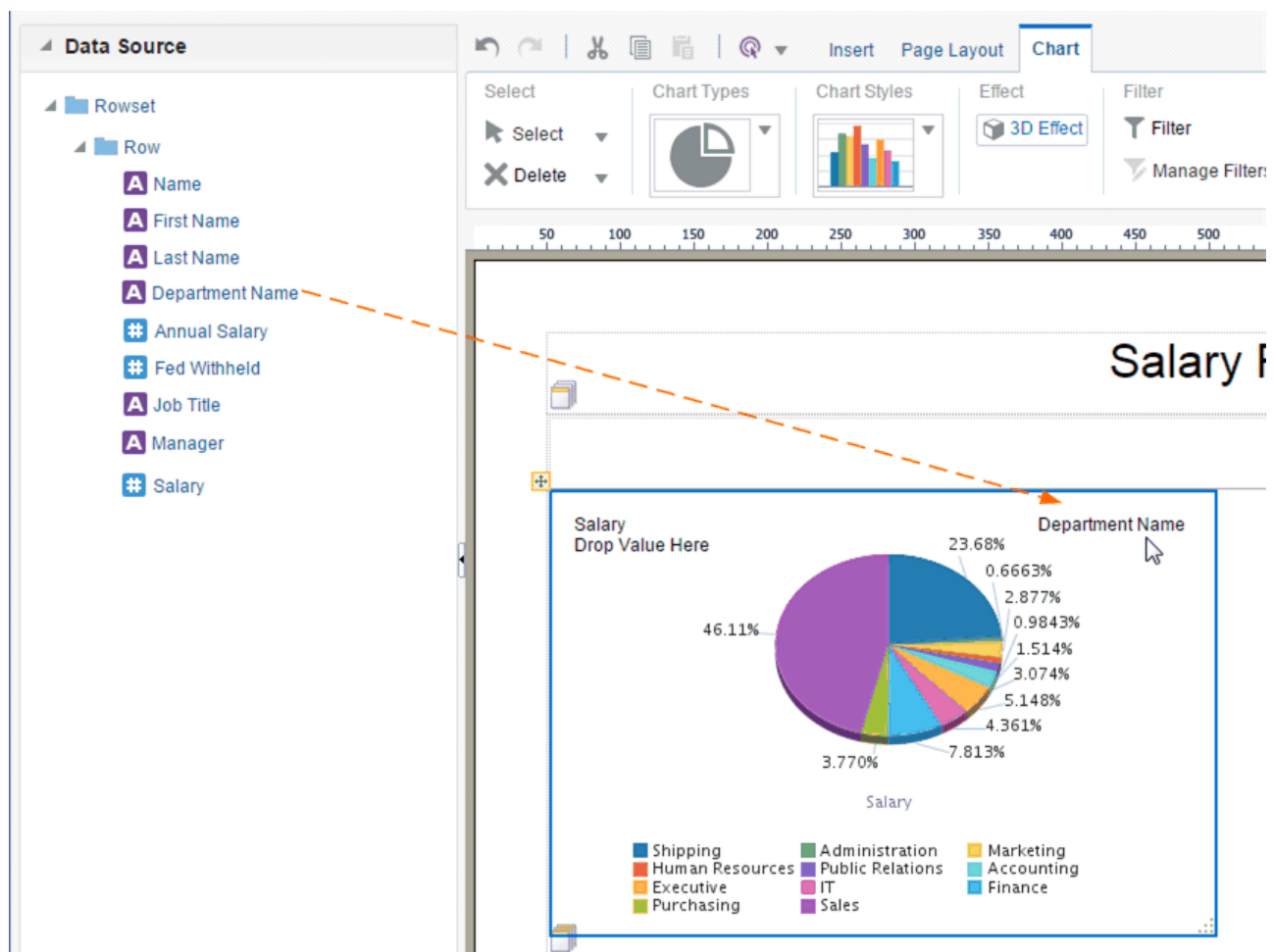
By default an empty vertical bar chart is inserted and the **Chart** dynamic tab is displayed, as shown in the following figure:



2. To change the chart type, click the **Chart Type** list to select a different type. In the following figure, the chart type is changed to Pie.

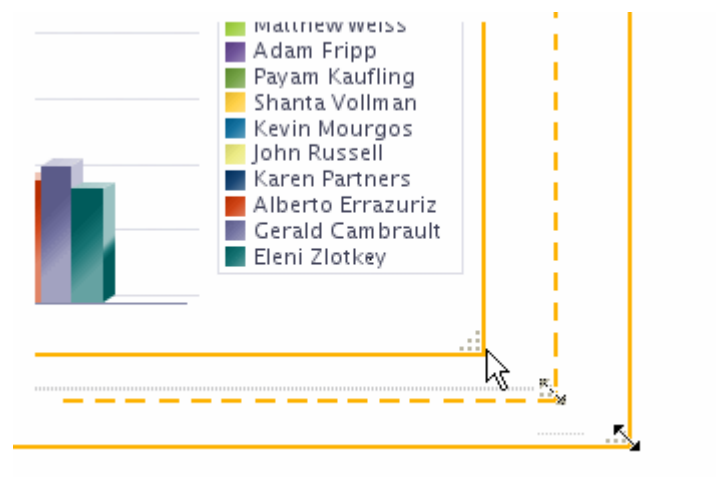


3. Select and drag the data fields from the Data Source pane to the appropriate areas in the chart. The chart immediately updates with the preview data, as shown in the following figure:



- To resize the chart, drag and drop the resize handler on the lower right corner of the chart, as shown in the figure below.

To preserve the aspect ratio when resizing a chart, press and hold the Shift key before starting to drag the corner.



## About the Chart Tab

The **Chart** tab helps you to apply a different chart type, filter the data, manage multiple filters.

The **Chart** tab enables you to perform the following:

- Select a different **Chart** Type
- Apply a different **Chart** Style
- Enable 3-D effects
- Filter the data that is displayed in the chart
- Manage multiple filters
- Convert the chart to a pivot table or switch the series and dimensions values

## Apply and Manage Filters

This section helps you to know how to apply and manage filters.

See [About Filters](#) for information on how to apply and manage filters.

## Convert a Chart to a Pivot Table

Follow these steps to convert a chart to a pivot table.

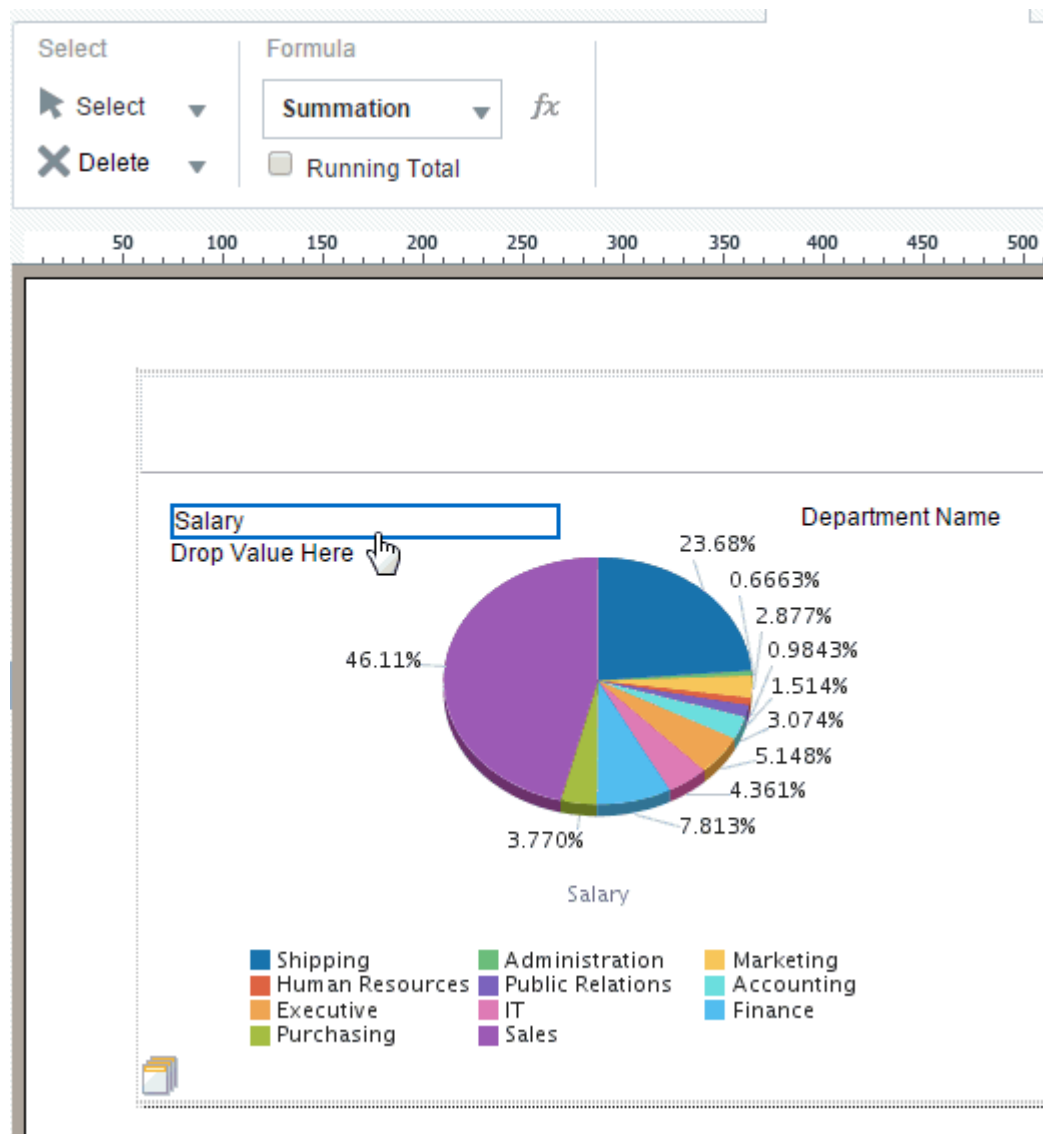
1. Select the chart.
2. In the **Convert** group, click **Pivot Table**.

The layout editor converts the label, series, and value elements of the chart into the appropriate rows, columns, and data elements of a pivot table.

## Change the Formula Applied to a Chart Measure Field

By default, the chart displays a sum of the values of the chart measure. You can change the formula applied to a chart measure field by selecting an option from the **Chart Measure Field** tab.

1. Select the measure field in the chart. This displays the **Chart Measure Field** tab, as shown in the following figure:



2. Select from the following options available from the **Formula** list:

- Count
- Sum
- Running Total

## Sort a Chart Field

Charts can be sorted by fields.

To sort a field in the chart:

1. Select the field to display the **Chart Field** tab.
2. On the **Chart Field** tab select **Sort Ascending** or **Sort Descending**.
3. To sort by multiple fields, apply a **Priority** to each sort field to apply the sort in the desired order.

## Use Advanced Chart Features

Create more useful charts by altering their appearance.

The following features enable you to apply additional formatting to your charts:

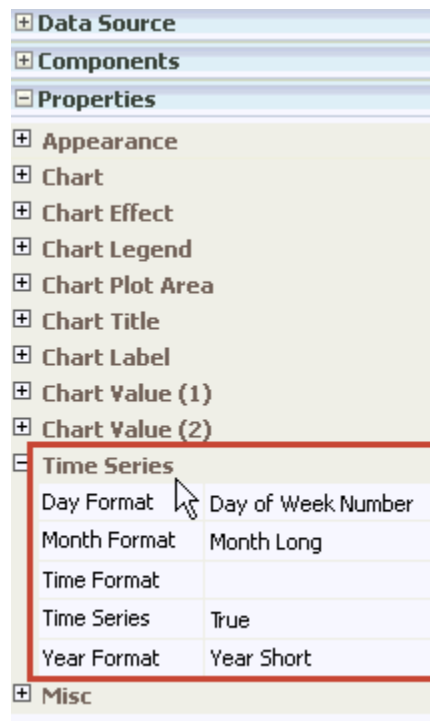
- [Format Time Series Axis](#)
- [Hide Axis Option](#)
- [Format Independent Axis](#)
- [Scale Axis](#)
- [Format Pie Slice](#)

If you do not select a value for these format options above, the Publisher default system settings are applied.

### Format Time Series Axis

When the x-axis of your line chart is a date field, Publisher applies a time series format based on the range of the data.

The following illustration shows the time series format options. You can customize the display of the time series in your chart, or turn it off.



To select time series date formatting options for a chart:

1. Expand the Time Series report properties category.
2. In **Day Format** field, select one of the following format options for days:

- **None** to hide the day label.
  - **Day of Week** to display only the names of each day of the week.
  - **Day Single Letter** to display only the first letter of each day of the week.
  - **Day of Week Number** to display only the number assigned to each day of the week. For example, if Sunday is the first day of the week, it can be displayed as 1, Monday displayed as 2, etc.
  - **Day of Month** to display all days in a month by the actual date. For example, the first day of the month would be displayed as 1.
3. In **Month Format** field, select one of the following format options for months:
- **None** to hide all month labels.
  - **Month Number** to display only a number for each month in the year. For example, if the first month of the year is January, it's displayed in the chart as 1.
  - **Month Single Letter** to display only the first letter of each month in the year.
  - **Month Short** to display only the short names for each month. For example, January can be displayed as Jan.
  - **Month Long** to display only the full name of each month.
4. In the **Time Format** field, select one of the following format options for time increments:
- **None** to hide all time labels.
  - **Hour** to display time in hours.
  - **Hour24** to display time in 24 hour increments.
  - **Hour24 Minute** to display minutes in 24 hour increments.
  - **Hour Minute** to display time in hours and minutes.
  - **Second** to display time in seconds.
5. In **Year Format** field, select one of the following format options for years:
- **None** to hide all year labels.
  - **Year Short** to display only the short names for each year.
  - **Year Long** to display only the full name of each year.

## Hide Axis Option

You can hide axis labels in reports for certain situations such as when you are working with small charts or visualizing data without values. This option is especially useful for creating reports that evaluate trends.

To hide an axis:

1. On the Properties pane, expand the Chart Label, Chart Value (1) or Chart Value (2) report properties category.
2. In Axis Visible, select **False**.

## Format Independent Axis

You can format decimal digits and numbers for each Y axis in a multiple Y-axis report.

To format decimal digits and number types for an axis:



1. On the Properties pane, expand the Chart Value (1) or Chart Value (2) report category.
2. To format axis decimals, in the Axis Decimals field, enter the number of decimals to display for a data element per axis.
3. To format data decimals for an axis where the Data Visible property is set to True, enter the number of decimals to display on the axis.
4. To apply number formatting to an axis, in the Format field, select one of the following options: General, Percent, or Currency.
5. If you select Currency, in the Currency Symbol field, manually enter the currency symbol.

## Scale Axis

You can set chart axis scaling as logarithmic or linear in reports.

1. On the **Properties** pane, expand the Chart Value (1) or Chart Value (2) report properties category.
2. In the **Axis Scaling** field, select one of the following options: Logarithmic or Linear.

## Format Pie Slice

You can format pie slice charts to display percentages, total actual values, percentages, and labels.

To format pie slices:

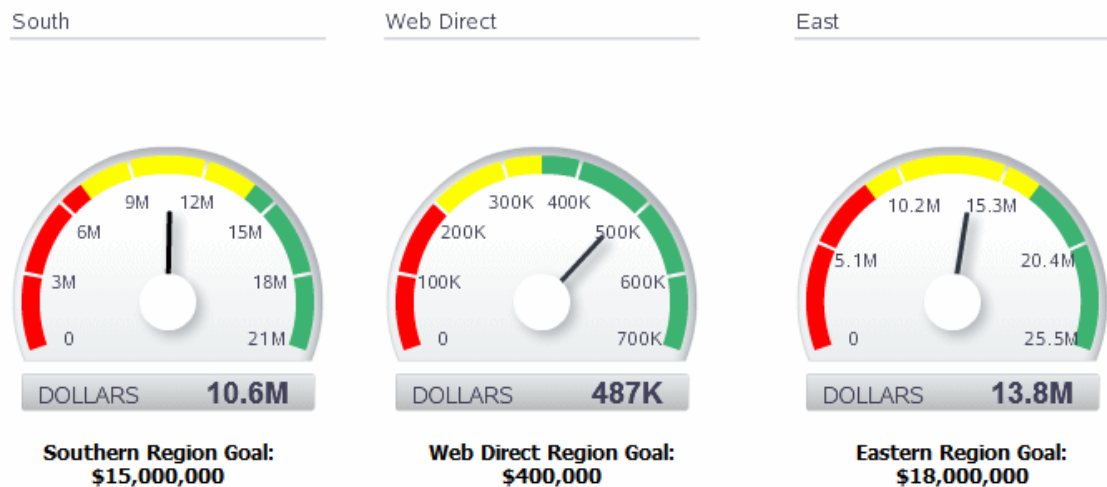
1. On the Properties pane, expand the Plot Area report property category.
2. In the **Pie Slice Format** field, select one of the following options: Percent, Value, Label, or Label and Percent.

## About Gauge Charts

A gauge chart is a useful way to illustrate progress or goals. The illustration shows a report with gauges.

For example, the following figure shows a report with three gauges to indicate the status of regional sales goals:

## Regional Sales



## Insert a Gauge Chart

Follow these steps to insert a gauge chart.

To insert a gauge chart in the layout:

1. From the **Insert** menu, select and drag the **Gauge** component to the layout. This inserts an empty gauge chart.
2. Select and drag the data fields from the Data Source pane to the Label, Value, and Series areas of the chart. The chart immediately updates with the preview data.

Note the following:

- A separate gauge is created for each occurrence of the Label (that is, each REGION). One set of properties applies to each occurrence.
- By default, the **Value** field is a sum. You can change the expression applied to the value field.
- You can apply a sort to the other gauge chart fields.

## Apply and Manage Filters

Follow this section to know how to apply and manage filters.

See [About Filters](#) for information on how to apply and manage filters.

## About Pivot Tables

The pivot table provides views of multidimensional data in tabular form. It supports multiple measures and dimensions and subtotals at all levels.

The following figure shows a pivot table:

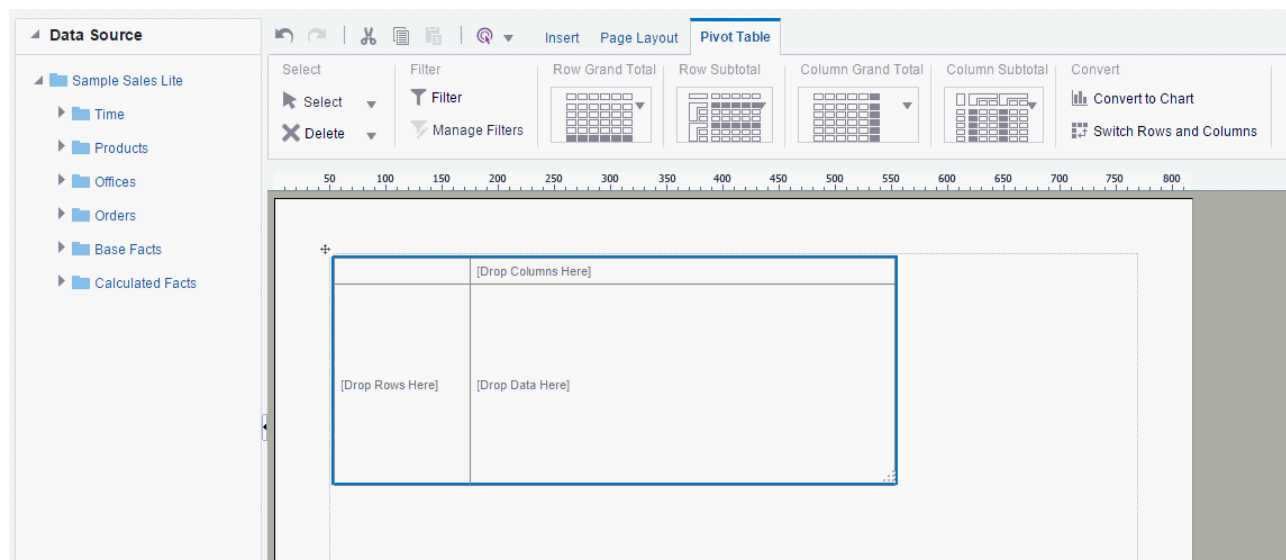
		Magicolor		Subtotal		Total	
		PrevRevenue	Revenue	PrevRevenue	Revenue	PrevRevenue	Revenue
CENTRAL REGION	CHICAGO DISTRICT	5,587.00	3,741.00	5,587.00	3,741.00	5,587.00	3,741.00
	CINCINNATI DISTRICT	9,875.00	38,054.00	9,875.00	38,054.00	9,875.00	38,054.00
	DETROIT DISTRICT	5,706.00	2,149.00	5,706.00	2,149.00	5,706.00	2,149.00
	KANSAS CITY DISTRICT	9,467.00	55,519.00	9,467.00	55,519.00	9,467.00	55,519.00
	MINNEAPOLIS DISTRICT	140.00	231.00	140.00	231.00	140.00	231.00
Subtotal		30,775.00	99,694.00	30,775.00	99,694.00	30,775.00	99,694.00
Total		30,775.00	99,694.00	30,775.00	99,694.00	30,775.00	99,694.00

## Insert a Pivot Table

Follow the steps in the procedure to insert a pivot table.

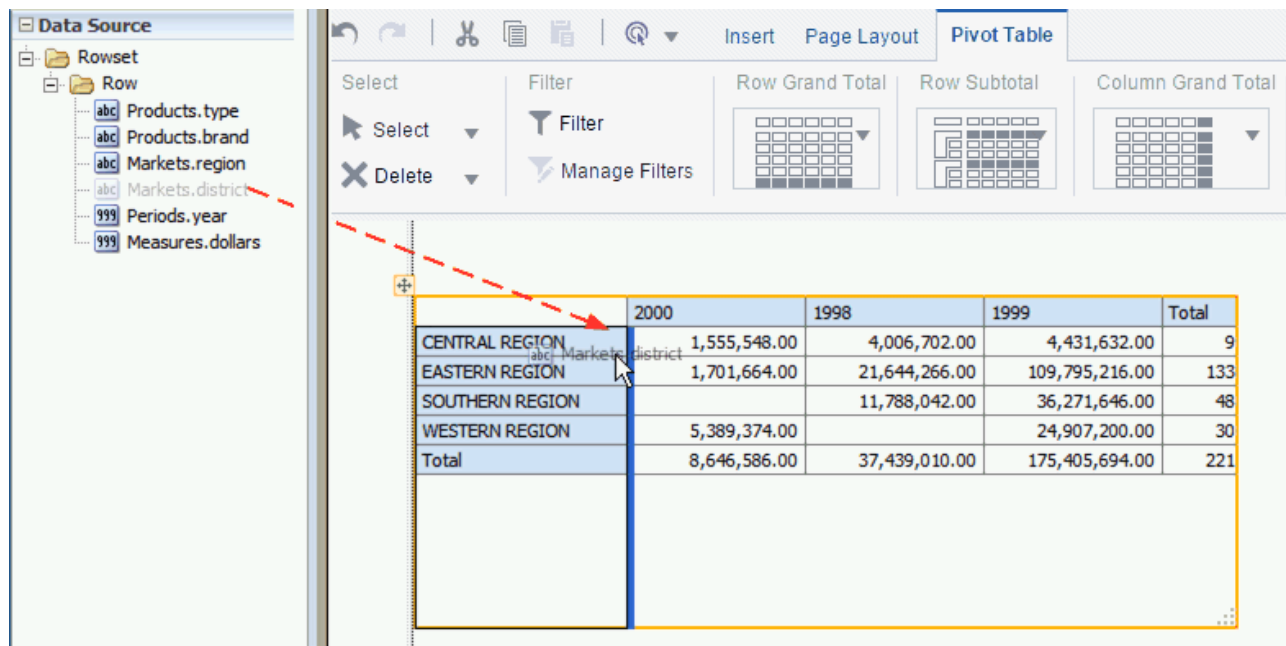
To insert a pivot table:

1. From the **Insert** tab, select and drag the **Pivot Table** component to the layout. The following figure shows the empty pivot table structure.

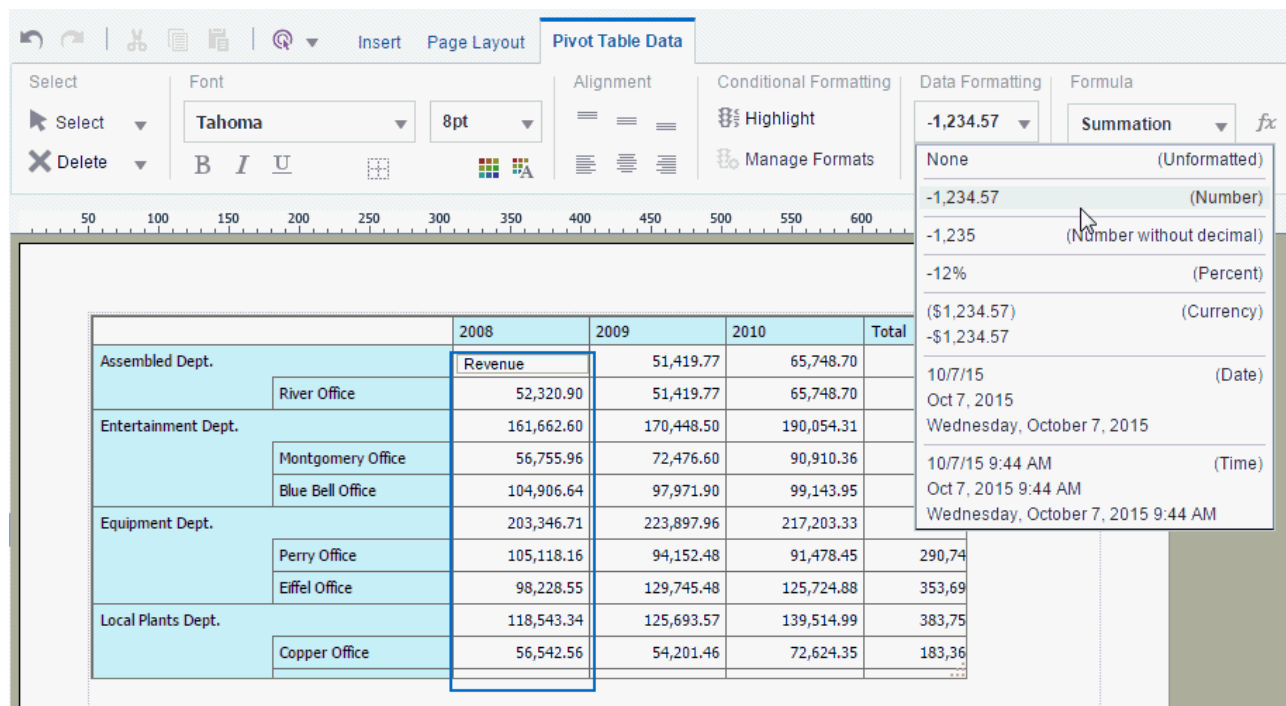


2. Drag and drop data fields from the Data Source pane to the row, column, and data positions.

Drag multiple fields to the pivot table and place them precisely to structure the pivot table, as shown in the following figure:



- By default the pivot table is inserted with no data formatting applied. To apply a format to the data, click the first column of data to enable the Pivot Table Data toolbar. On the Data Formatting group, select the appropriate format as shown in the following figure:



- Optional: Resize the pivot table by clicking and dragging the handler in the lower right corner of the pivot table.

## Customize a Pivot Table Menu

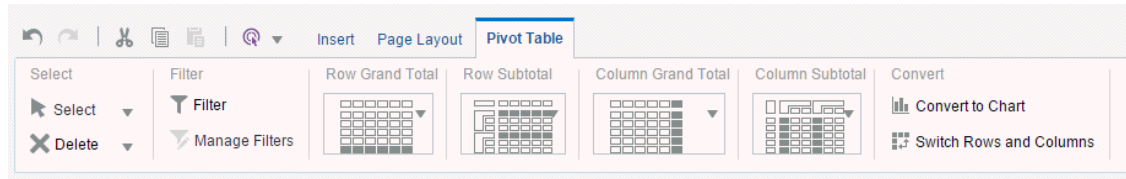
After you insert a pivot table customize the appearance and layout using these dynamic tabs.

- **Pivot Table** tab
- **Pivot Table Header** tab
- **Pivot Table Data** tab

## About the Pivot Table Tab

You can customize the appearance of a pivot table using the **Pivot Table** tab.

The following figure shows the **Pivot Table** tab.



## Apply Filters

This section describes filters and manage filters features.

See [About Filters](#) for a description of the **Filter** and **Manage Filters** features.

## Customize the Display of Totals

The **Pivot Table** tab enables you to quickly customize the display of grand total and subtotal rows.

By default, the layout editor inserts the pivot table with the total and subtotal displays as shown in the tab:

- **Row Grand Total** - Inserted at the bottom of table
- **Row Subtotal** - Inserted at the top of each subgroup, with no row header
- **Column Grand Total** - Inserted at the far right
- **Column Subtotal** - Inserted to the left of each column subgroup, with no header

Change the positioning and display of totals and subtotals by clicking the appropriate group in the tab and selecting the desired layout pattern from the menu.

## Convert a Pivot Table to a Chart

The **Convert Pivot Table to a Chart** command converts the pivot table to a default vertical bar chart.

After conversion, customize the table as described in [About Charts](#).

The following figure shows the pivot table created in the preceding step converted to a vertical bar chart.



## Switch Rows and Columns

Use the Switch Rows and Columns command to see a different view of the same data.

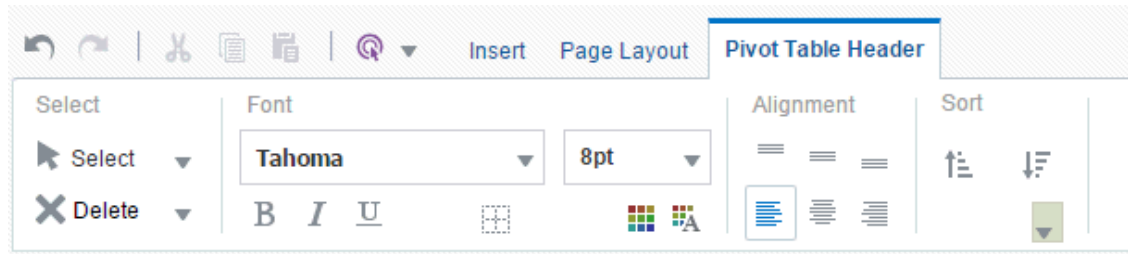
The following illustration shows the pivot table created in the previous step with rows and columns switched.

	CENTRAL REGION			EASTERN REGION	
		CHICAGO DISTRICT	KANSAS CITY DISTRICT	MINNEAPOLIS DISTRICT	NEW DIS
2000	1,555,548.00	1,555,548.00			1,701,664.00
1998	4,006,702.00		4,006,702.00		21,644,266.00
1999	4,431,632.00		1,897,554.00	2,534,078.00	109,795,216.00
Total	9,993,882.00	1,555,548.00	5,904,256.00	2,534,078.00	133,141,146.00

## Customize the Pivot Table Headers

Use the **Pivot Table Header** tab to customize the fonts, colors, etc.

The **Pivot Table Header** tab is shown in the following figure:



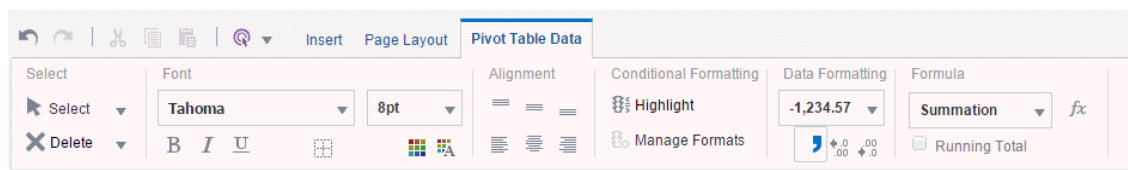
Select the column or row header of the pivot table and use the **Pivot Table Header** tab to perform the following:

- Customize the fonts, colors, alignment and other display features of the header.
- Apply a sort order (for more information see [About the Sort Option](#)).
- Apply data formatting (if the data type is number or date).

## Customize the Pivot Table Data

Select the data area of the pivot table and use the **Pivot Table Data** tab to perform these actions. The commands in the **Pivot Table Data** tab are the same as the corresponding commands in the table Column tab.

The **Pivot Table Data** tab is shown in the following figure:



See the references for more information on their use.

- Customize the fonts, colors, alignment and other display features of the data.
- Apply conditional formatting to the data for more information (see [About Conditional Formats](#)).
- Apply data formatting (see [About the Data Formatting Options for Columns](#)).
- Apply a formula (see [Apply a Formula](#)).

## About Text Items

The text item component allows you to enter free-form text in the layout.

1. Drag and drop the text item component to the layout.
2. Double-click the text to enter text editor mode. Select parts of the text to apply different formatting to different parts.

## Display a Data Field Side-by-Side with a Text Item

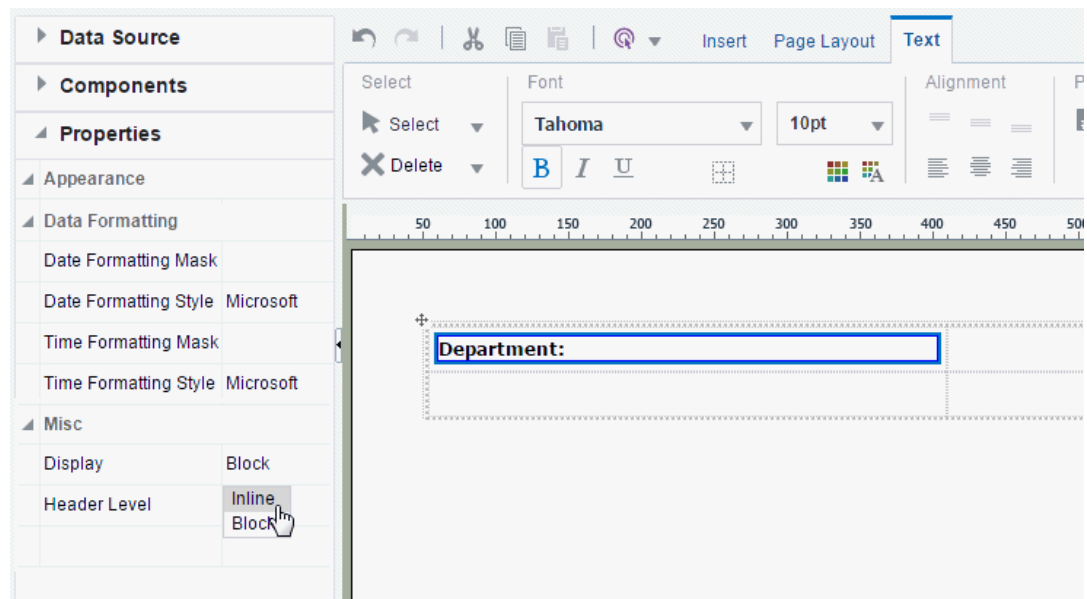
By default, the text item always spawns a complete paragraph. Inserting a data field next to the text field places the data field beneath the text field.

The data field beneath a text item is shown in the following figure:



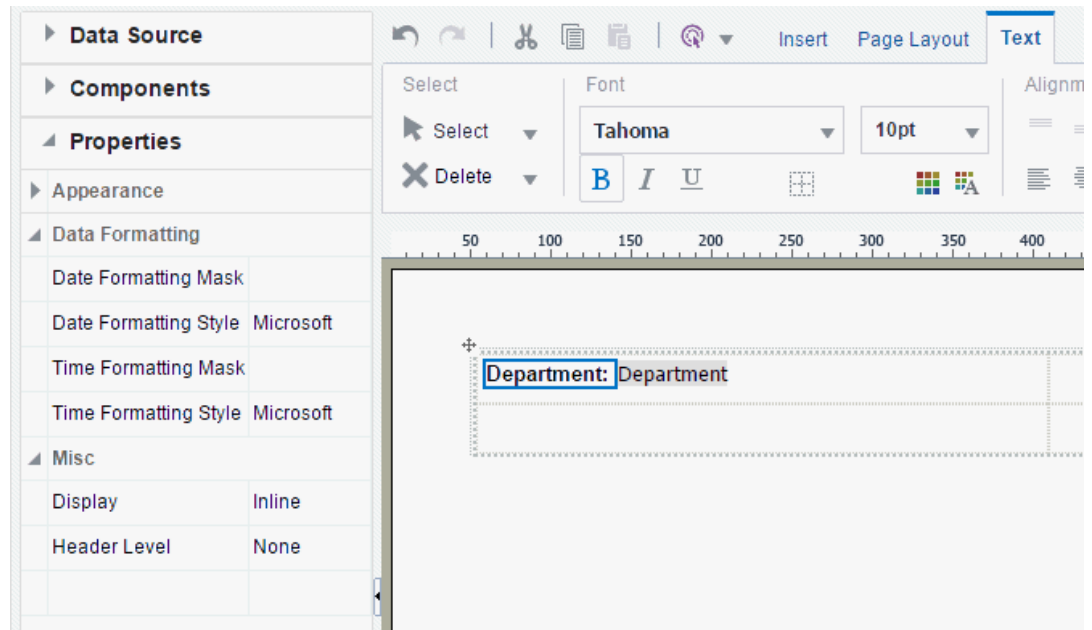
To display the data field inline with the text item:

- Set the Display property to **Inline** in the **Properties** pane.



This setting enables the positioning of text items and data fields into a single line as shown in the following figure:

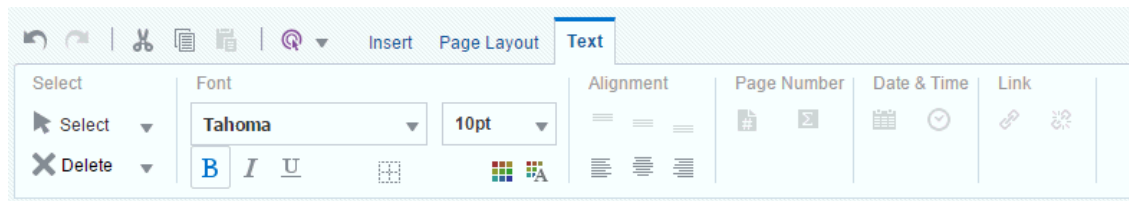




## About the Text Toolbar

The **Text** tab defines all the functions that you can do with respect to font and alignment of text in a report.

The **Text** tab is shown in the following figure.



The **Text** tab enables you to perform the following:

- Set the font properties
- Set alignment of the text in the grid cell
- Insert predefined text items: page number, date, and time
- Insert a hyperlink

## Edit Font Properties

Use the Font group of commands to set the style, size, emphasis, and color.

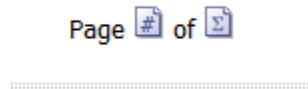
- Select a font style
- Select a font size
- Apply emphasis (bold, italic, or underline)
- Insert a border around the text item

- Apply a background color
- Apply a font color

## Insert Page Numbers

Drag and drop the page number component to the design area.

The following illustration shows the Page # of *N* construction.



To create the Page # of *N* construction:

1. From the **Insert** tab drag and drop a **Text Item** to the design area where you want the page numbers to display.
2. Double-click the inserted text to select the text item for editing. Type "Page ".
3. From the **Text** dynamic tab, drag and drop the **Page Number** component.
4. Enter a space, and type "of ".
5. From the **Text** dynamic tab, drag and drop the **Page Total** component.

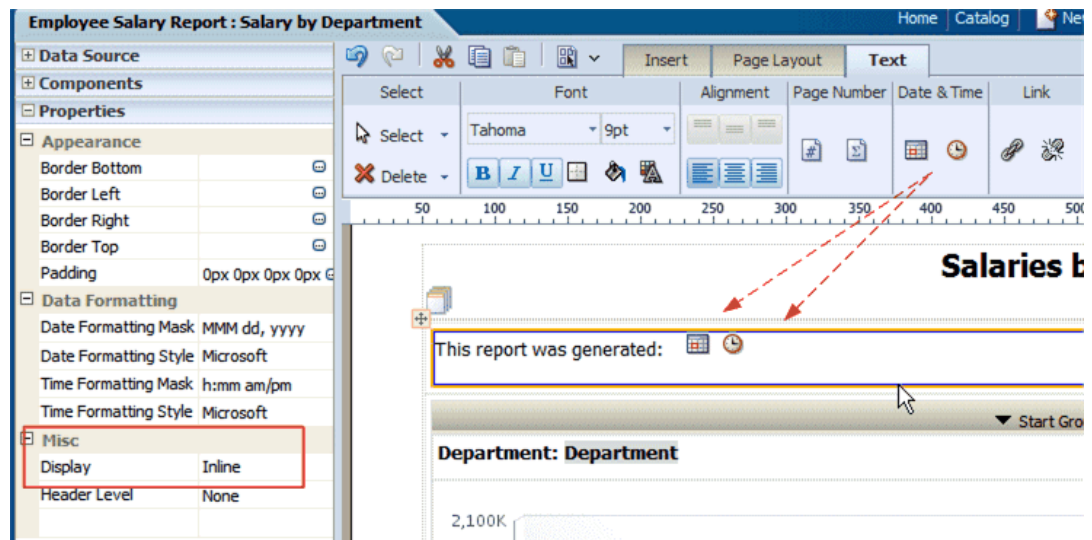
## Insert the Date and Time

You can insert time and date variables in a report layout.

1. From the tab drag and drop a **Text Item** to the design area where you want the date and time to display.
2. Double-click the inserted text to select the text item for editing.
3. Click the **Date** icon to insert the date icon in the text item. Click the **Time** icon to insert the time icon in the text item.

To display the items side-by-side, set the **Text Item** property to "Inline".

The following illustration shows the insertion of the date and time icons.



When this report is viewed, the date and time are displayed according to the server time zone if viewed online, or for scheduled reports, the time zone selected for the schedule job.

## Insert a Hyperlink

Follow these steps to insert a hyperlink.

To insert a hyperlink in a report:

1. From the **Insert** tab drag and drop a **Text Item** to the design area where you want the date and time to display.
2. Double-click the inserted text to select the text item for editing. Enter the text which you want to convert to a link.
3. Select the text, then click the **Link** button.
4. In the dialog enter the URL.

## About Images

The image component enables you to include a graphic in the layout.

Publisher supports the following methods for including an image:

- **Static image:** Upload a static image that is saved in the report file. An uploaded image file must be in one of the following graphic file formats: GIF, JPEG, PNG, or BMP. The image file cannot be larger than 500 KB.
- **Static URL:** Specify a static link to a URL where an image is stored.
- **Dynamic URL:** Include the image URL in an element of the data. The value of the element is evaluated at runtime enabling dynamic insertion of images.

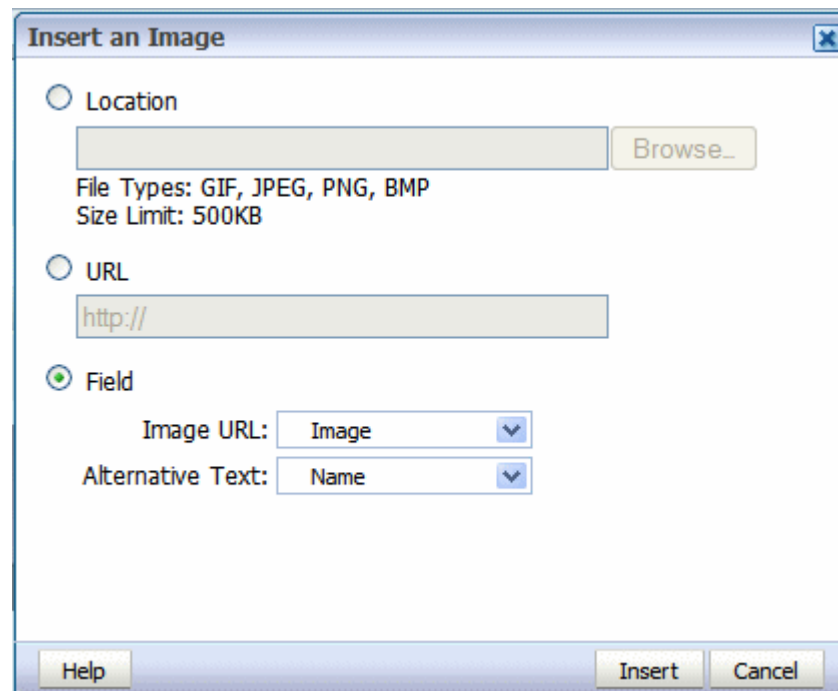
### Note

You can't embed an SVG image in a PDF report.

To include an image in a layout:

1. Drag and drop the image component to the layout.
2. In the Insert an Image dialog, specify one of the following sources for the image:
  - **Location:** Click **Browse** to specify the file name and directory of the image on a local or mapped drive to upload the image.
  - **URL:** Enter the URL where the image is stored.
  - **Field:**
    - Image URL:** Select the field from the data that contains a URL to an image.
    - Alternative Text:** If the data includes a field that contains alternative text for the image, then select that field to display alternative text when the report is viewed as HTML.

The following figure shows the Insert an Image dialog set up to retrieve an image URL dynamically from the "Image" data element. The value of the "Name" element is used as alternative text.



3. Optional: Resize the image in one of the following ways:
  - Drag the right bottom corner of the image. To preserve the aspect ratio when resizing an image, press and hold the Shift key before starting to drag the corner.
  - Modify the width and height in the **Properties** pane.

## Add BLOB Image

You can add a Binary Large Object (BLOB) image in an RTF or XPT template. Usage of an RTF template is recommended for BLOB images.

To add a BLOB image in XPT layout:

1. Specify the data column type as Binary Large Object (BLOB).
2. Insert the image in the BLOB column, and then select the BLOB column data element to display as image.

To add multiple BLOB data rows in tabular format, use Repeating Group. Include a Layout Grid to create a tabular format, and add the BLOB column in the Layout grid.

3. In the column preceding the BLOB image, type "data:image/jpeg;base64," along with the quotes.

## About Lists

The list component displays all values of a data element in a vertical or horizontal list. When viewed in interactive mode, clicking an item in the list updates the results shown in the linked components of the report.

The following figure shows a report that displays multiple charts based on sales data. The list component displays each country with sales data. The list enables the report consumer to quickly see results for each country in the list by clicking the entry in the list.

Click item in list to update  
results shown in other  
layout components



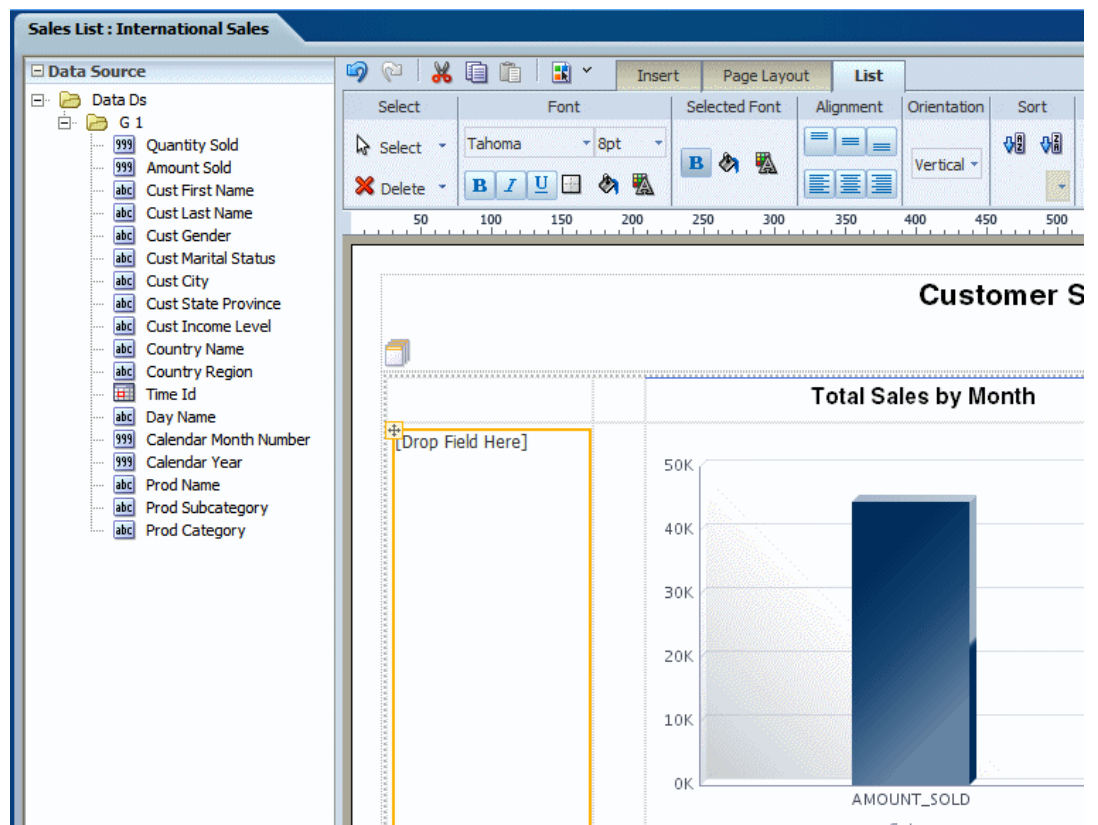
## Insert a List

Follow these steps to insert a list.

To insert a list:

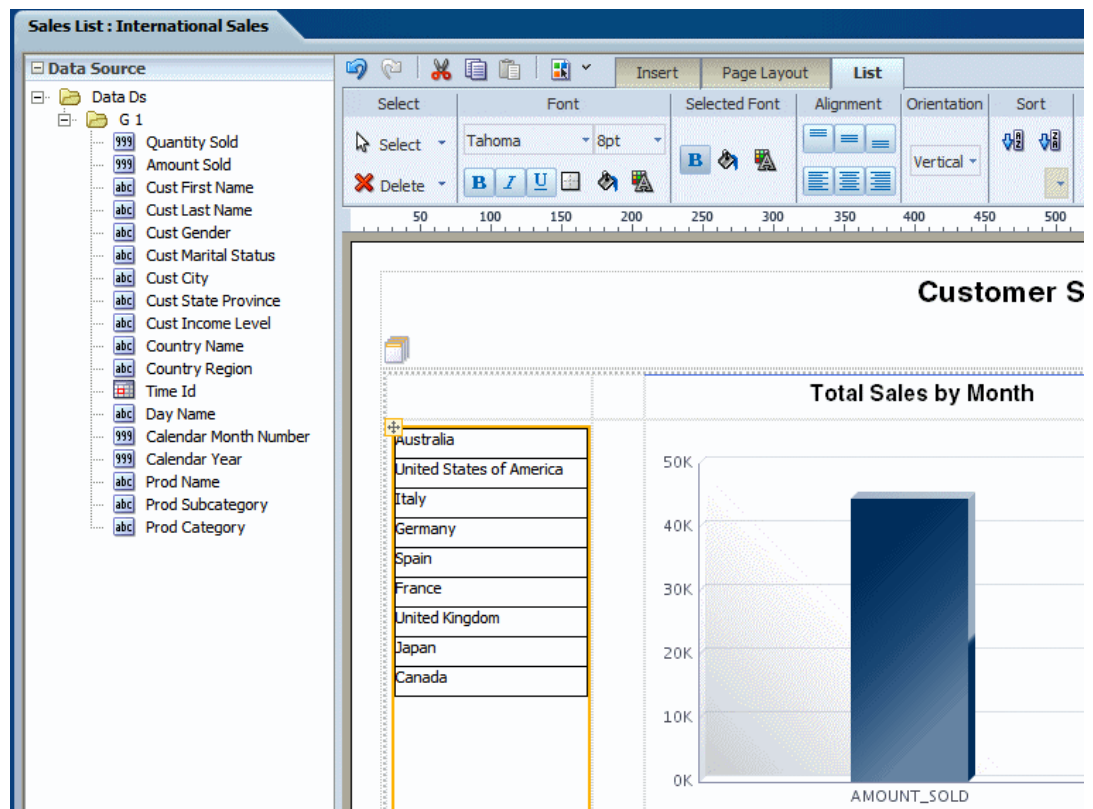
1. From the **Insert** tab, select and drag the **List** component to the design area.

The following figure shows an inserted, empty list:



2. To create the list, select an element from the Data Source pane and drag it to the empty list in the layout.

The following figure shows the list component after dragging the element Country Name to it.



3. Customize the appearance of the list.
4. Configure linked components using the **Configure Events** command. By default, all other tables and charts in the layout are configured to filter their results based on the user selections in the list component.

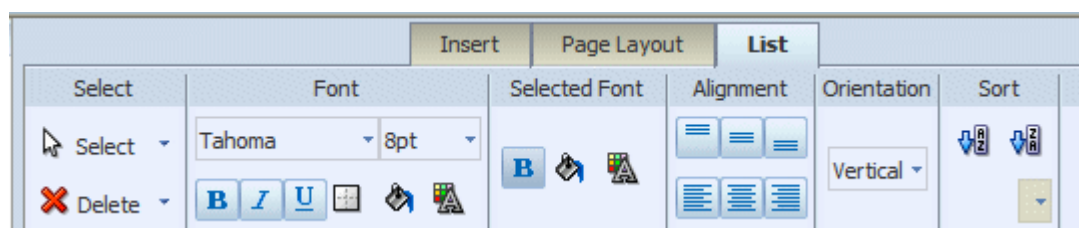
## Customize a List

The **List** tab helps you to edit the font attributes, define border for the list, set background color, etc.

Use the **List** tab to:

- Edit the font size, style, and color
- Define borders for the list
- Set the background color
- Edit the font color and background color for the display of selected items
- Set the orientation of the list
- Specify the sort order

The following figure shows the **List** tab:



## Customize the Font Style and the Selected Font Style Commands

This figure illustrates default formats. The list on the left shows the default format of the list. The list on the right shows the **Selected Font** default format



Australia
Brazil
Canada
Denmark
France
Germany
Italy
Japan
Singapore
Spain
Turkey
United Kingdom
United States of America

Default format of list with  
no items selected



France
Australia
Brazil
Canada
Denmark
Germany
Italy
Japan
Singapore
Spain
Turkey
United Kingdom
United States of America

Default format with item  
selected

Edit the font settings by selecting a font family from the list and adjusting the point size.

By default, the list displays with one point black gridlines. Click the **Set Border** to adjust the default borders of the list. Use the **Background Color** and **Font Color** commands to customize the colors.

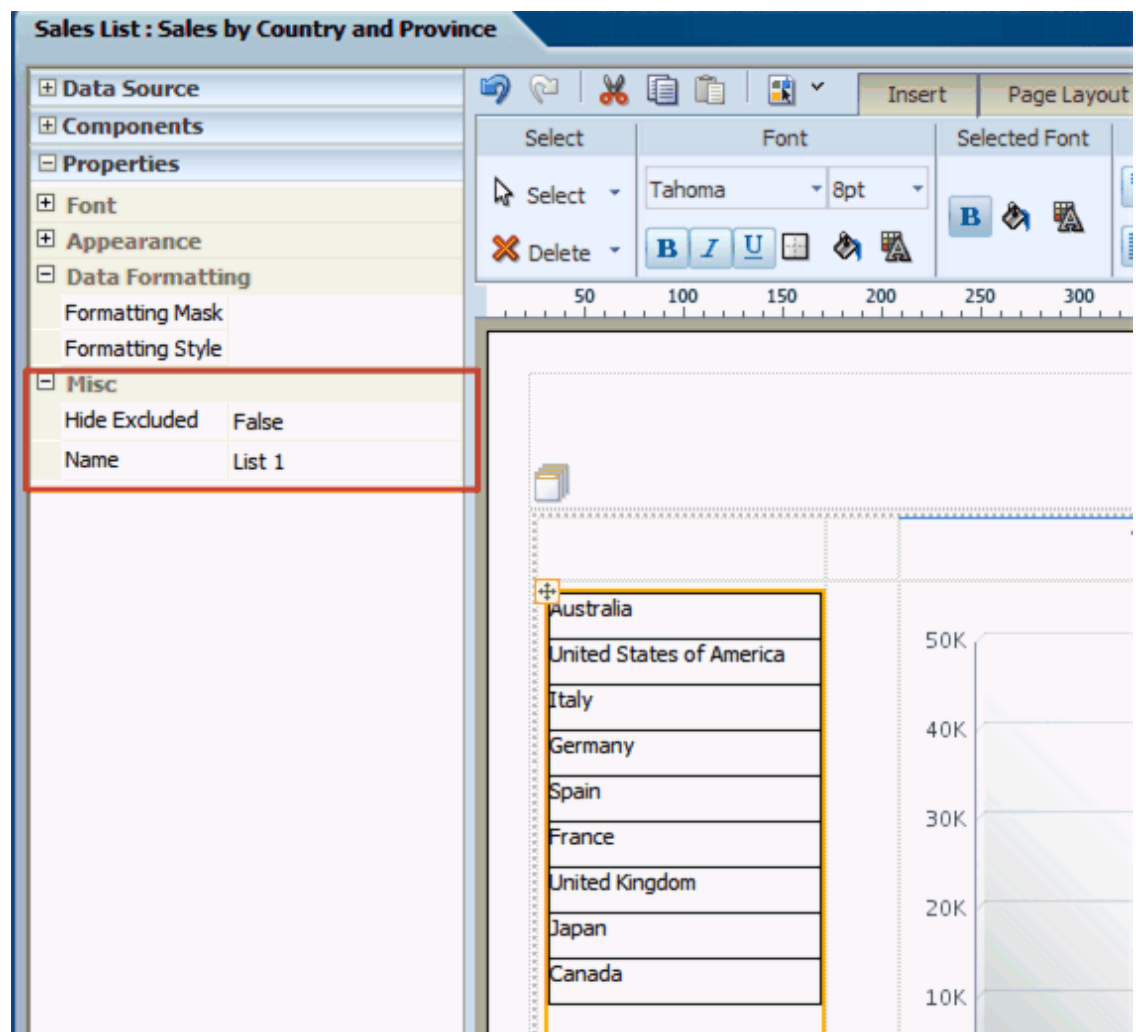
The **Selected Font** commands edit the appearance of the item in a list when it's selected. By default, the selected element is moved to the top of the list, and the background is changed to light blue. You can edit the font weight, background color, and font color that are displayed for selected items.

## Customize Behavior of Selected Items

By default, the selected items move to the top of the list and the non-selected items are hidden by a gray fill. You also have the option of not applying this behavior by setting the property **Hide Excluded**.

This property is available from the **Properties** pane when the List component is selected. The **Hide Excluded** property is highlighted in the following figure:





The following figure shows the difference in the display depending on the setting of the property:

Display of selected item  
when "Hide Excluded" set  
to False

France
Australia
Brazil
Canada
Denmark
Germany
Italy
Japan
Singapore
Spain
Turkey
United Kingdom
United States of America

Selected item moved to top  
of list; other items grayed  
out

Display of selected item  
when "Hide Excluded" set  
to True

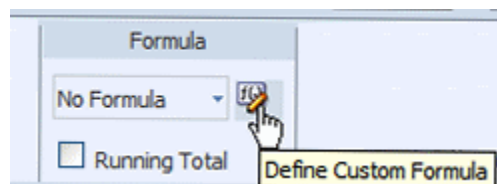
Australia
Brazil
Canada
Denmark
France
Germany
Italy
Japan
Singapore
Spain
Turkey
United Kingdom
United States of America

Selected item not moved;  
other items unchanged

## Set Predefined or Custom Formulas

You can set custom formulas using the Define Custom Formula icon.

The following illustration shows the Define Custom Formula icon.



The Formula group of commands is available from the following tabs:

- Column tab
- Total Cell tab
- Chart Measure Field tab
- Pivot Table Data tab

Note that not all options are applicable to each component type.

## About the Predefined Formulas

The table provides definitions of predefined formulas.

The menu provides the predefined formulas that are described in the following table.

Formula	Description
<b>No Formula</b>	Removes any mathematical formula from a numeric column.
<b>Blank Text</b>	Removes all data and inserts blank text.
<b>Count</b>	Returns the count of the number of occurrences of the element in the current group.
<b>Count Distinct</b>	Returns a count of the distinct values of an element in the current group.
<b>Summation</b>	Sums the values of the element in the current group.
<b>Average</b>	Displays the average of the values in the current group.
<b>Maximum</b>	Displays the highest value of all occurrences in the current group.
<b>Minimum</b>	Displays the lowest value of all occurrences in the current group.

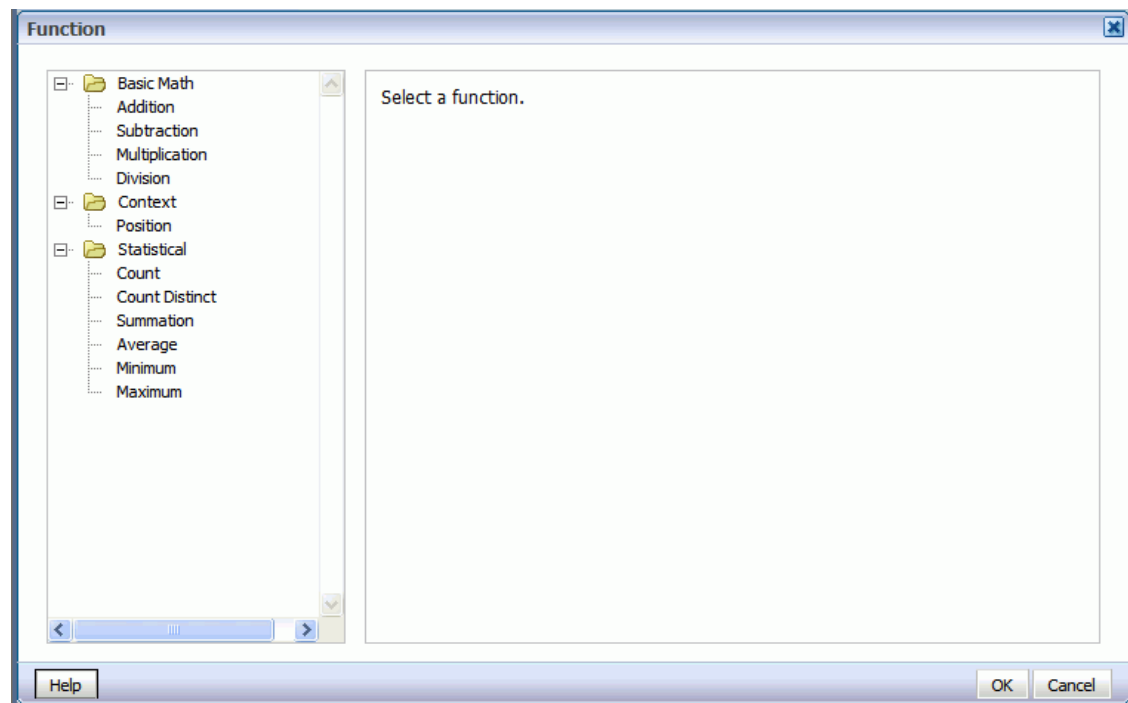
For non-numeric data, only the following formula options are supported:

- Blank Text
- Count
- Count Distinct

## Apply a Custom Formula

Click **Define Custom Formula** to define your own formula for a component. The Function dialog enables you to define Basic Math, Context, and Statistical functions in the layout.

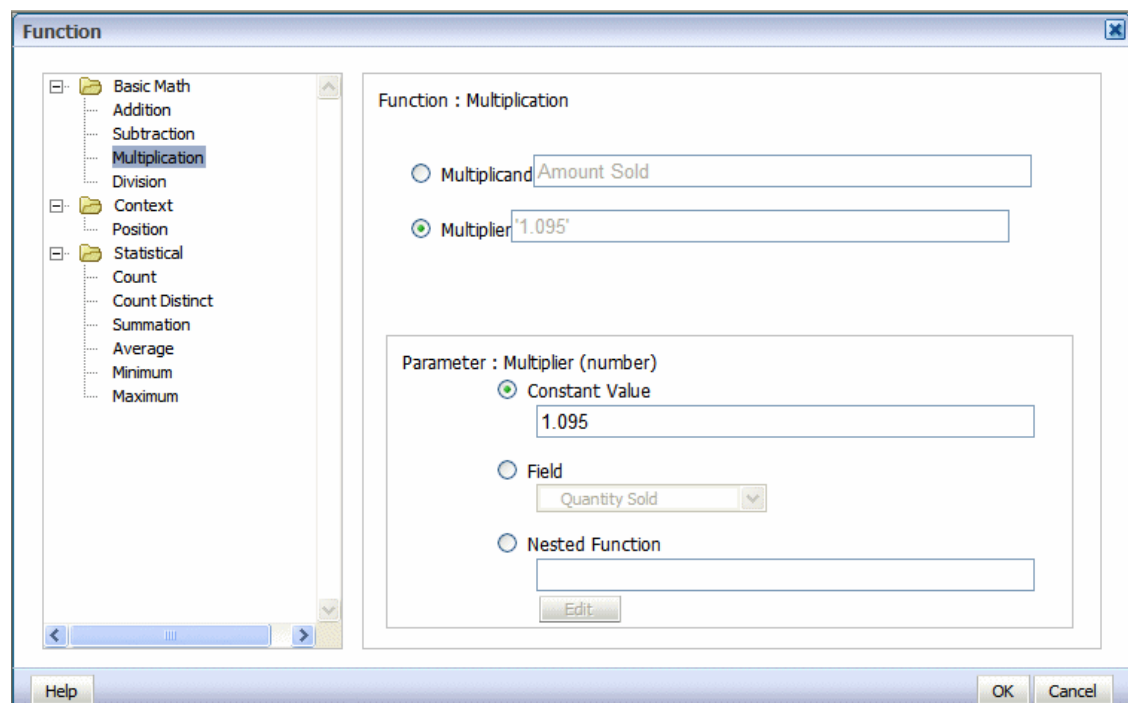
The following figure shows the Function dialog:



## About the Basic Math Functions

When you click one of the basic math functions, you are prompted to define the appropriate parameters for the function. You can enter a constant value, select a field from the data, or create a nested function to supply the value.

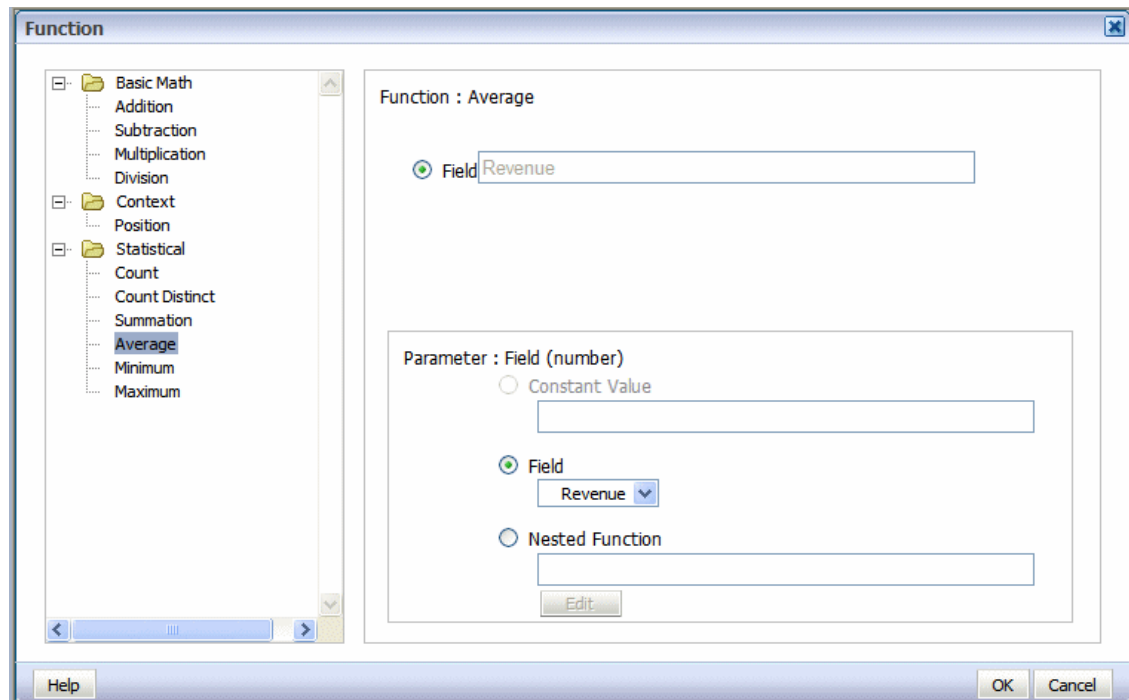
In the **Function** dialog, clicking the **Multiplication** function displays prompts to enter the multiplicand and the multiplier. The example shows that the multiplicand is the value of the Amount Sold field. The multiplier is the constant value.



## About the Statistical Math Functions

When you click one of the statistical math functions you are prompted to define the appropriate parameter for the function. You can select a field from the data, or create a nested function to supply the values.

In the following figure, clicking the **Average** function displays prompts for you to specify the source of the values for which to calculate the average.



## Apply a Custom Formula: Examples

Follow these examples to understand custom formula.

### Example 12-1 Example 1: Subtraction

The following figure shows data for Revenue and Cost for each Office:

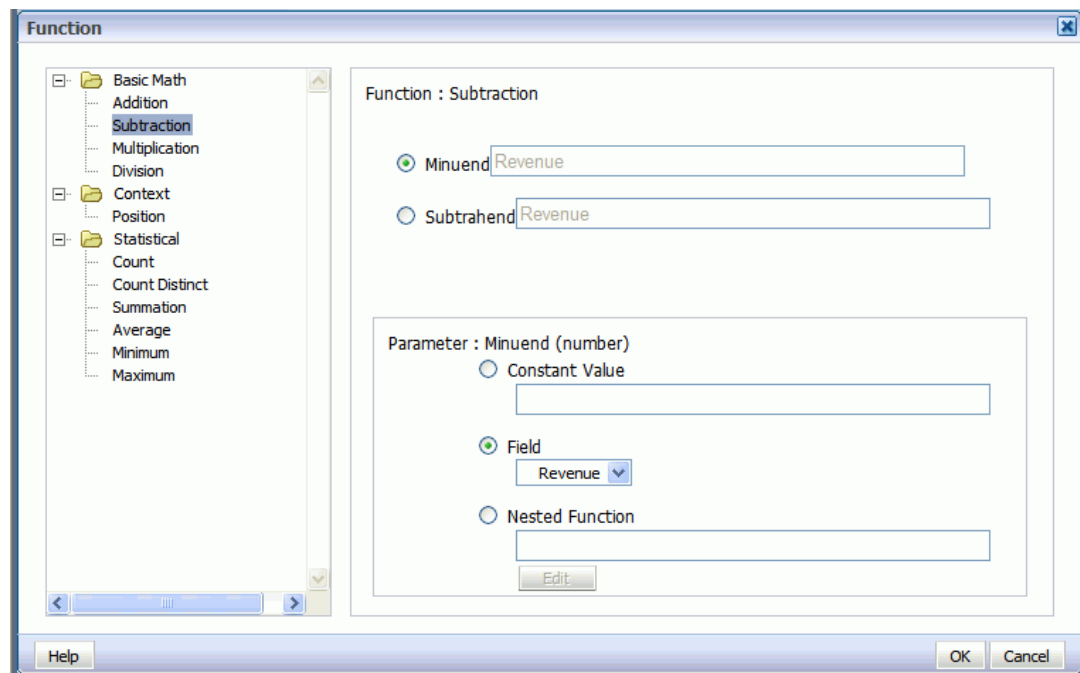
Office	Revenue	Cost
Whalen	\$4,400.00	\$1,100.00
Hartstein	\$13,000.00	\$3,250.00
Fay	\$6,000.00	\$1,500.00
Raphaely	\$11,000.00	\$2,750.00
Khoo	\$3,100.00	\$775.00
Baida	\$2,900.00	\$725.00
Tobias	\$2,800.00	\$700.00
Himuro	\$2,600.00	\$650.00
Colmenares	\$2,500.00	\$625.00
Mavris	\$6,500.00	\$1,625.00

Using a custom formula, you can add a column to this table to calculate Profit (Revenue - Cost).

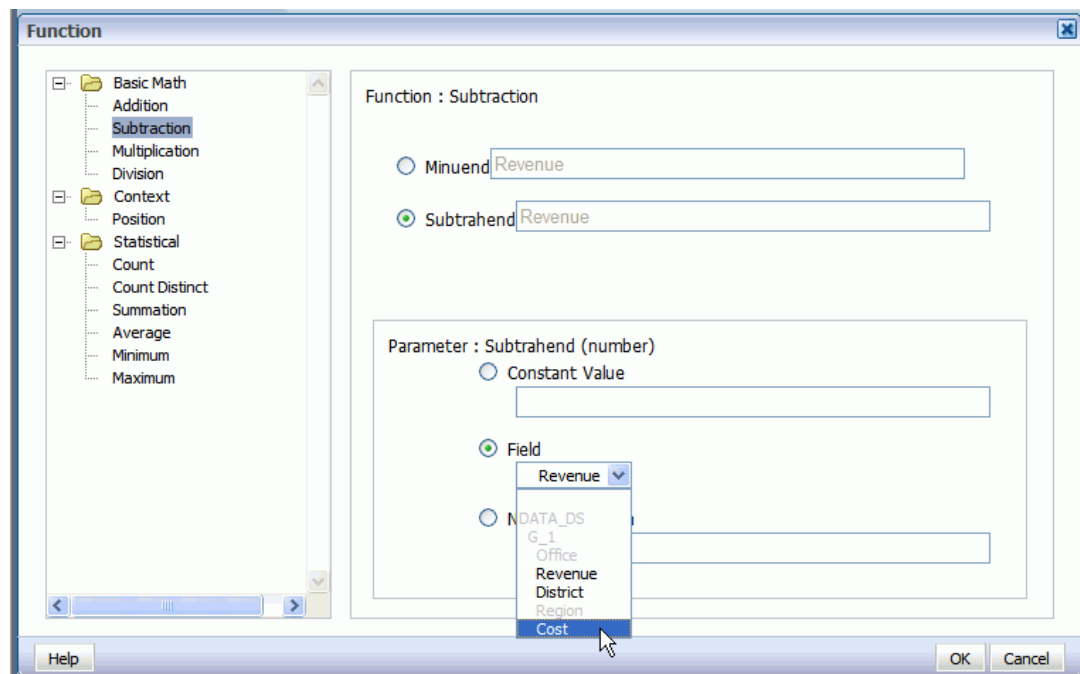
1. Add another numeric data column to the table. For example, drag another instance of Revenue to the table, as shown in the following figure:

Office	Revenue	Cost	Revenue
Whalen	\$4,400.00	\$1,100.00	\$4,400.00
Hartstein	\$13,000.00	\$3,250.00	\$13,000.00
Fay	\$6,000.00	\$1,500.00	\$6,000.00
Raphaely	\$11,000.00	\$2,750.00	\$11,000.00
Khoo	\$3,100.00	\$775.00	\$3,100.00
Baida	\$2,900.00	\$725.00	\$2,900.00
Tobias	\$2,800.00	\$700.00	\$2,800.00
Himuro	\$2,600.00	\$650.00	\$2,600.00
Colmenares	\$2,500.00	\$625.00	\$2,500.00
Mavris	\$6,500.00	\$1,625.00	\$6,500.00

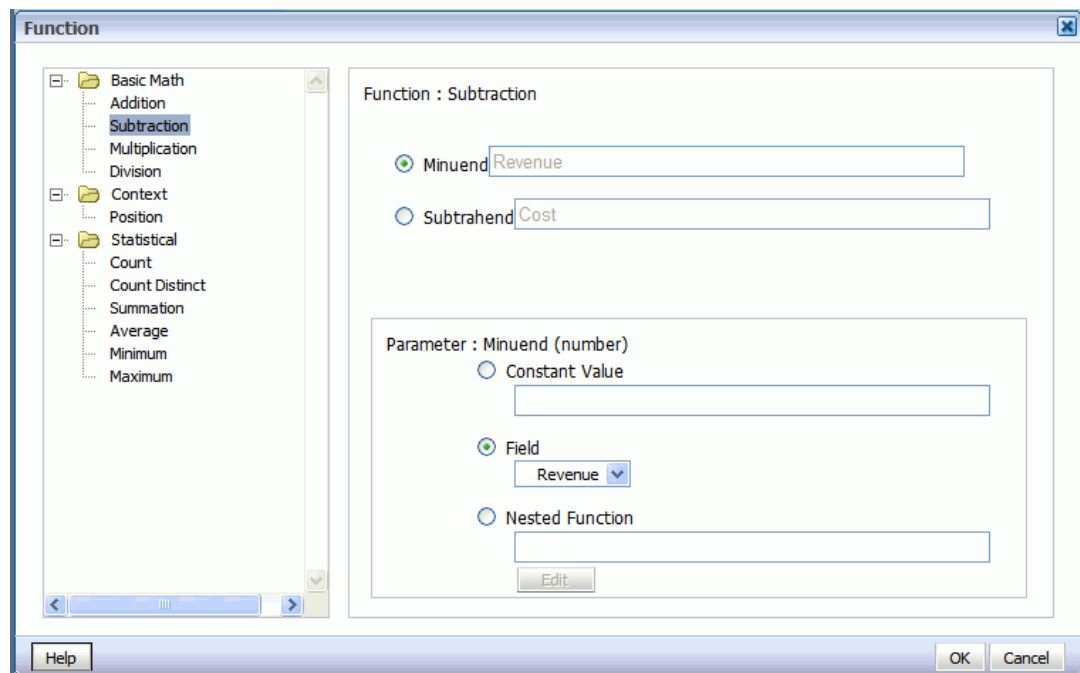
2. With the table column selected, click **Define Custom Formula**.
3. In the Function dialog select **Subtraction** from the list, as shown in the following figure. Because the source data for the column is Revenue, by default the **Minuend** and the **Subtrahend** both show the Revenue element.



4. Select **Subtrahend**, then in the **Parameter** region, select **Field** and choose the **Cost** element, as shown in the following figure:



The dialog is updated to show that the formula is now Revenue minus Cost, as shown in the following figure:



5. Click **OK** to close the dialog.
6. The table column displays the custom formula. Edit the table column header title, and now the table has a Profit column, as shown in the following figure:

Office	Revenue	Cost	Profit
Whalen	\$4,400.00	\$1,100.00	\$3,300.00
Hartstein	\$13,000.00	\$3,250.00	\$9,750.00
Fay	\$6,000.00	\$1,500.00	\$4,500.00
Raphaely	\$11,000.00	\$2,750.00	\$8,250.00
Khoo	\$3,100.00	\$775.00	\$2,325.00
Baida	\$2,900.00	\$725.00	\$2,175.00
Tobias	\$2,800.00	\$700.00	\$2,100.00
Himuro	\$2,600.00	\$650.00	\$1,950.00
Colmenares	\$2,500.00	\$625.00	\$1,875.00
Mavris	\$6,500.00	\$1,625.00	\$4,875.00

### Example 12-2 Example 2: Nested Function

This example uses a nested function to create a column that shows Revenue less taxes.

1. Add another numeric data column to the table. For example, drag another instance of Revenue to the table, as shown in the following figure:

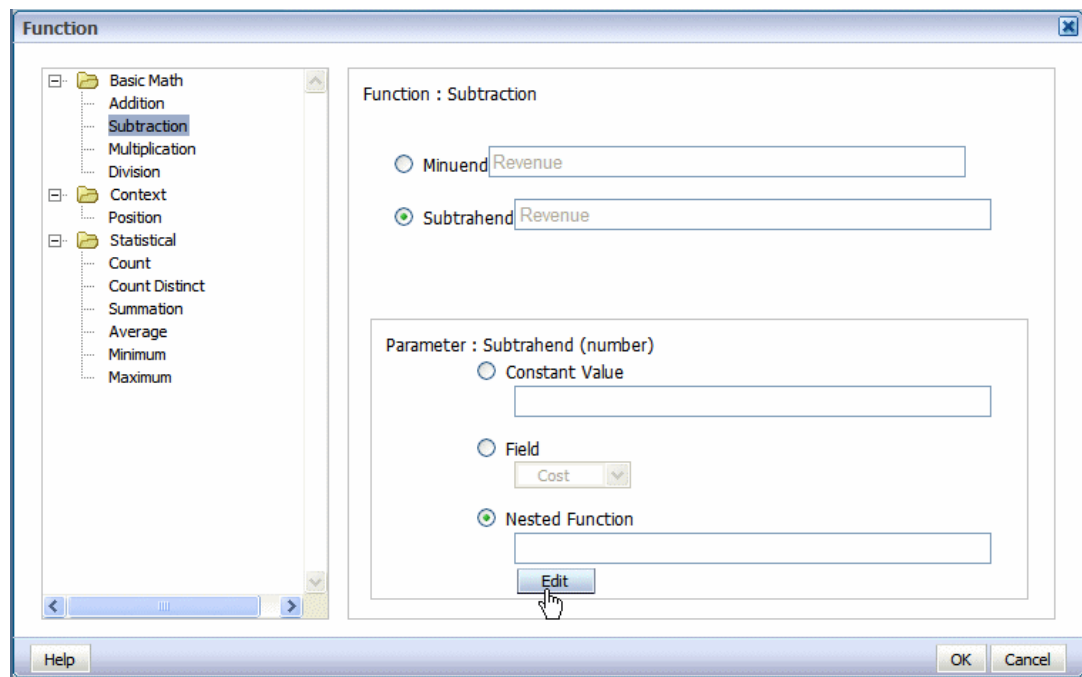


Office	Revenue	Revenue
Whalen	\$4,400.00	\$4,400.00
Hartstein	\$13,000.00	\$13,000.00
Fay	\$6,000.00	\$6,000.00
Raphaely	\$11,000.00	\$11,000.00
Khoo	\$3,100.00	\$3,100.00
Baida	\$2,900.00	\$2,900.00
Tobias	\$2,800.00	\$2,800.00
Himuro	\$2,600.00	\$2,600.00
Colmenares	\$2,500.00	\$2,500.00
Mavris	\$6,500.00	\$6,500.00

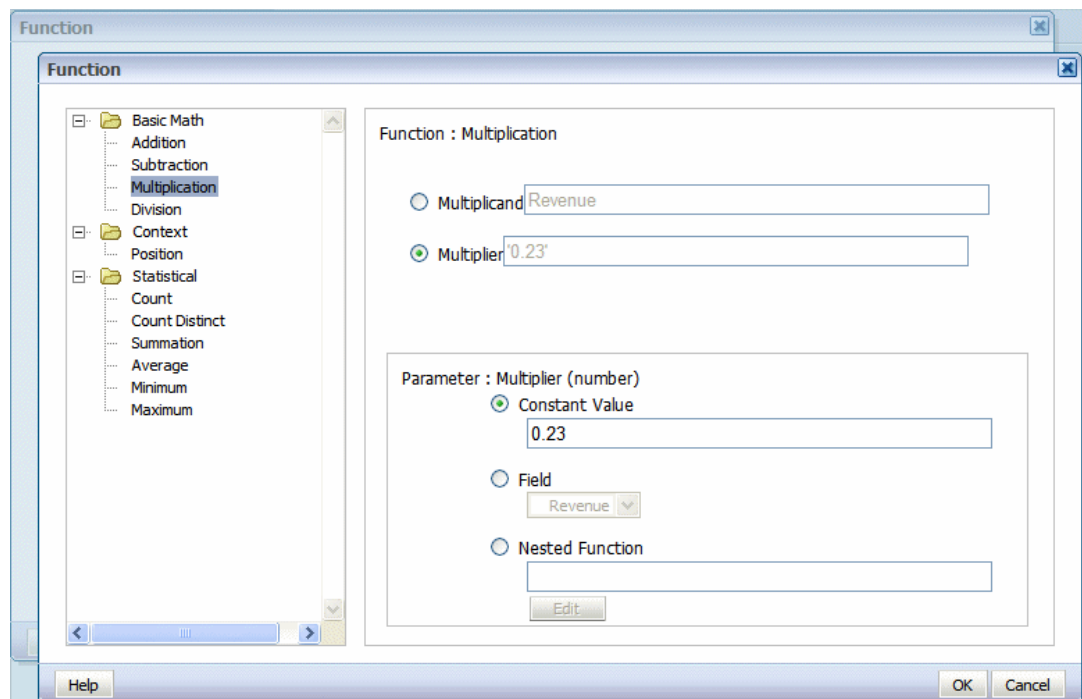
- With the table column selected, click **Define Custom Formula**.
- In the Function dialog select **Subtraction** from the list. Because the source data for the column is Revenue, by default the **Minuend** and the **Subtrahend** both show the Revenue element, as shown in the following figure:

The screenshot shows the 'Function' dialog box. On the left, a tree view lists various functions under categories like 'Basic Math', 'Context', and 'Statistical'. 'Subtraction' is selected under 'Basic Math'. The main area shows 'Function : Subtraction'. Below this, there are two radio buttons: 'Minuend' (selected) and 'Subtrahend'. Both have a text field containing 'Revenue'. Below these is a section titled 'Parameter : Minuend (number)' with three radio buttons: 'Constant Value', 'Field' (selected), and 'Nested Function'. The 'Field' option has a dropdown menu showing 'Revenue'. An 'Edit' button is located below the 'Nested Function' option. At the bottom of the dialog are 'Help', 'OK', and 'Cancel' buttons.

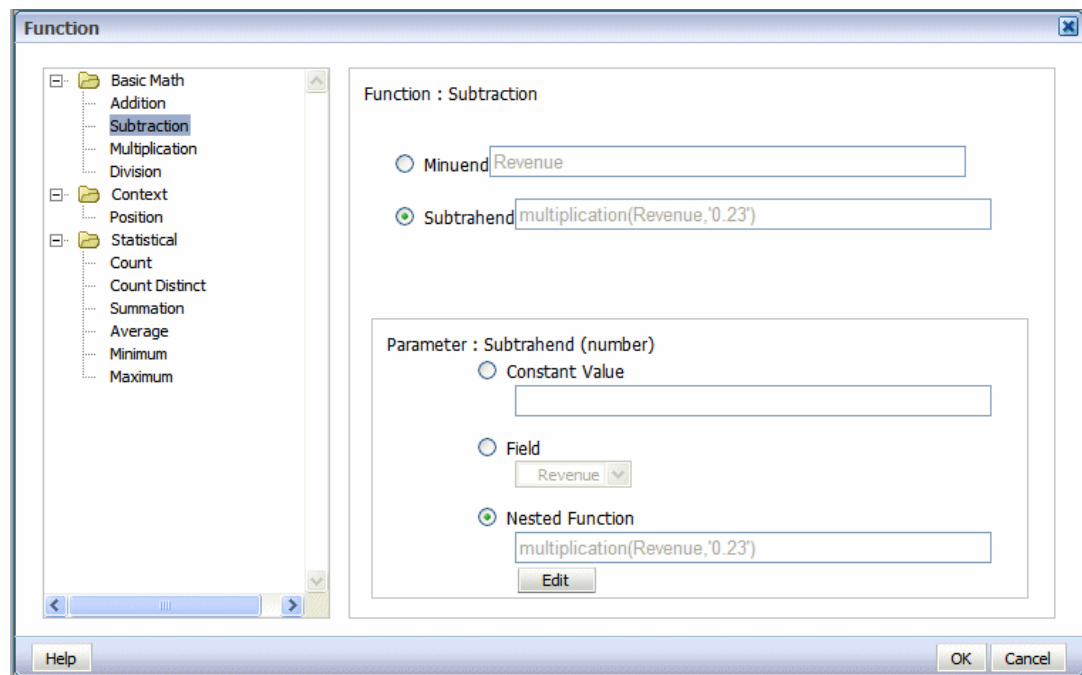
- Select **Subtrahend**, then in the **Parameter** region, select **Nested Function** and click **Edit**, as shown in the following figure.



A second Function dialog is displayed to enable you to define the nested function. In this case the nested function is Revenue times a constant value (tax rate of .23), as shown in the following figure:



5. Click **OK** to close the dialog. The primary Function dialog now shows the nested function as the source of the subtrahend, as shown in the following figure:



- Click **OK** to close the Function dialog. The table column displays the custom formula. Edit the table column header label, and now the table displays the custom function, as shown in the following figure:

Office	Revenue	Revenue less tax (23%)
Whalen	4,400.00	3,388.00
Hartstein	13,000.00	10,010.00
Fay	6,000.00	4,620.00
Raphaely	11,000.00	8,470.00
Khoo	3,100.00	2,387.00
Baida	2,900.00	2,233.00
Tobias	2,800.00	2,156.00
Himuro	2,600.00	2,002.00
Colmenares	2,500.00	1,925.00
Mavris	6,500.00	5,005.00
	633,500.00	487,795.00

## Save a Layout

You can save a report layout to the report definition.

- Click the **Save** or **Save As** toolbar button
- Enter a unique name for this layout.
- Select a **Locale**.

Note that after you save the layout, you can't update the Locale.



# Create RTF Templates

This topic describes the concepts of associating XML data to layout elements in an RTF report template. It describes basic and advanced techniques for creating complex and highly conditionalized report formats.

## Topics:

- [Get Started](#)
- [Associate the XML Data to the Template Layout](#)
- [Add Markup to the Template Layout](#)
- [Define Groups](#)
- [Define Headers and Footers](#)
- [Insert Images and Charts](#)
- [Add Drawings, Shapes, and Clip Art](#)
- [Supported Formatting Features of Microsoft Word](#)
- [Template Features](#)
- [Use Conditional Formatting](#)
- [Insert Page-Level Calculations](#)
- [Handle Data](#)
- [Set Variables, Parameters, and Properties](#)
- [Use Advanced Report Layouts](#)
- [Format Numbers, Dates, and Currencies](#)
- [Support Calendars and Time Zones](#)
- [Control the Placement of Instructions Using the Context Commands](#)
- [Use XPath Commands](#)
- [Declare Namespaces](#)
- [Use FO Elements and XSL Elements](#)
- [Guidelines for Designing RTF Templates for Microsoft PowerPoint Output](#)
- [Guidelines for Designing RTF Templates for Microsoft Excel Output](#)
- [Render HTML Formatted Data in a Report](#)
- [Embed PCL Commands for Check Printing](#)
- [2D Barcode Functions](#)

## Create a Data Set Using a View Object

Publisher enables you to connect to your custom applications built with Oracle Application Development Framework and use view objects in your applications as data sources for reports.

Performance of the query execution is better as the SQL is executed directly against the database.

Before you can create an Publisher data model using a view object, you must first create the view object in your application.

1. Click the **New Data Set** toolbar button and select **View Object**.
2. In the New Data Set - View Object dialog, enter a name for this data set.
3. Select the Data Source from the list. The data sources that you defined in the providers.xml file display.
4. Do one of the following:
  - Select **Yes** for **Execute as SQL** to extract the SQL query form the View Object and execute it on the Oracle Analytics Server domain.
  - Select **No** to execute the view object on the Oracle Applications domain through the ADF layer. The XML data is then streamed to the Oracle Analytics Server domain in chunks. This method results in poorer performance, but enables execution on the Applications domain. You can invoke some service interface layers to allow custom data manipulation.
5. Enter the fully qualified name of the application module, for example, example.apps.pa.entity.applicationModule.AppModuleAM.
6. Click **Load View Objects**.  
Publisher calls the application module to load the view object list.
7. Select the **View Object**.  
Any bind variables defined are retrieved.
8. Create a parameter to map to this bind variable.
9. Click **OK** to save your data set.

## Use Barcode Fonts in Reports

Publisher includes several fonts that output barcodes.

Font files included with Publisher:

- LibreBarcode128-Regular.TTF - Supports code128a, code128b, and code128c algorithms. Also supports code128auto to automatically switch between the three code128 algorithms.
- LibreBarcode39-Regular.TTF - Supports code39 and code39mod43 algorithms.
- LibreBarcodeEAN13Text-Regular.TTF - Supports upca and upce algorithms.

When you use one of these prepackaged fonts, Publisher executes the preprocessing on the data prior to applying the barcode font to the data in the output document. For example, to calculate checksum values or start and end bits for the data before formatting them.

At design time, you don't need to apply the barcode font to the field in Microsoft Word. Instead, you can map the font that you apply to the field using Publisher's font mapping. At runtime,

Publisher applies the barcode font to any field using the base font you specified in the font mapping. Be sure to choose a font that isn't used elsewhere in the template.

If you want to use the font directly in Microsoft Word, then add the appropriate .TTF file to the C:\WINDOWS\Fonts directory. To use the Template Builder Preview function, map the font in the Template Builder configuration file.

To use the barcode fonts in the report output:

1. Insert a field in the template where the barcode is to display in the report output.
2. In the form field, enter the following command:

```
<?format-barcode:data;'barcode_type'?>
```

where

*data* is the element from the XML data source to be encoded. For example: INVOICE\_NO

*barcode\_type* is one of the supported algorithms listed above.

Examples:

```
<?format-barcode:INVOICE_NO;'code128a'?>
```

```
<?format-barcode:INVOICE_NO;'code39mod43'?>
```

```
<?format-barcode:INVOICE_NO;'upca'?>
```

3. In Microsoft Word, apply the font to the field. If you haven't installed the barcode fonts on your client machine, then select a font that isn't used elsewhere in the template, for example, Bookman.
4. Configure the font in the Font Mapping page. For more information about the Font Mapping page.

Note the following:

- Microsoft Word may not render the barcode fonts properly even when they're installed on your client. To work around this issue, apply a different font to the field and map the font as described above.
- The upca algorithm accepts only UPC-A message string and encodes into UPC-A barcode.
- A string of 12 characters is treated as UPC-A message with a check digit, 11 is without a check digit.
- The upce algorithm accepts only UPC-E message strings and encodes into UPC-E barcode.
- A string of 8 characters is treated as a UPC-E message with both a front and end guard bar; a string of 6 characters is without guard bars.

## Implement Custom Barcode Formats

If you choose to use a custom barcode instead, use this procedure to implement a custom barcode.

Publisher offers the ability to execute preprocessing on the data prior to applying a barcode font to the data in the output document. For example, you might need to calculate checksum values or start and end bits for the data before formatting them.

The solution requires that you register a barcode encoding class with Publisher that can then be instantiated at runtime to apply the formatting in the template.

To enable the formatting feature in the template, you must use two commands in the template. The first command registers the barcode encoding class with Publisher. This must be declared somewhere in the template prior to the encoding command. The second is the encoding command to identify the data to be formatted.

## Register the Barcode Encoding Class

You can include barcodes in form fields.

Use the following syntax in a form field in the template to register the barcode encoding class:

```
<?register-barcode-vendor:java_class_name;barcode_vendor_id?>
```

This command requires a Java class name (this carries out the encoding) and a barcode vendor ID as defined by the class. This command must be placed in the template before the commands to encode the data in the template. For example:

```
<?register-barcode-vendor:'oracle.xdo.template.rtf.util.barcode.BarcodeUtil';XMLPBarVendor'?>
```

where

oracle.xdo.template.rtf.util.barcode.BarcodeUtil is the Java class and

XMLPBarVendor is the vendor ID that is defined by the class.

## Encode the Data

Use this syntax in a form field in the template to format the data.

```
<?format-barcode:data;'barcode_type'?>
```

where

data is the element from the XML data source to be encoded. For example: LABEL\_ID

barcode\_type is the method in the encoding Java class used to format the data. For example: code128a.

For example:

```
<?format-barcode:LABEL_ID;'code128a'?>
```

At runtime, the barcode\_type method is called to format the data value and the barcode font is then applied to the data in the final output.



## 2D Barcode Functions

You can use the QR code or PDF417 2D barcode type in RTF templates. When you create an RTF template, use the `qrcode` or `pdf417` functions to specify the barcode type. These functions don't require external fonts.

### qrcode Syntax

```
<?qrcode: <DATA>; <SIZE>; <CHARSET>; <ECLEVEL>; <GS1FORMAT>; <MASKPATTERN>;  
<QVERSION>]]]]]?>  
where
```

- *DATA* – Data to be encoded in the QR code format.
- *SIZE* – QR code size dimension in points(pt).
- *CHARSET* – (Optional) Character set for encoding the data. Default is UTF8.
- *ECLEVEL* – (Optional) QR code error correction level. Default is "M".  
Valid values are:
  - "H" (~30% correction)
  - "Q" (~25% correction)
  - "M" (~15% correction)
  - "L" (~7% correction)
- *GS1FORMAT* – (Optional) Whether to encode data in GS1 format. Enter "true" to encode data using the GS1 standard.
- *MASKPATTERN* – (Optional) QR code mask pattern to be used. Default is optimal mask pattern. Valid values are integers (or string representation of integers) from 1 to 7.
- *QVERSION* – (Optional) Exact version of the QR code to be encoded. Default is the version determined by the size of data to be encoded. Valid values are integers (or string representations of integers) from 1 to 40.

For example, the `qrcode` syntax to generate QR code with data of size 200pixel, high error correction level, GS1 format encoding, QR code version 4, and to use the default values of character set and mask patterns:

```
<?qrcode: '01049123451234591597033130128'; '200'; ; 'H'; 'true'; ; '4'?>
```

Note the character set and mask patterns are left blank to use the default values.

### pdf417 Syntax

```
<?pdf417: <DATA>; <XSCALE>; <COLUMNS>; <ROWS>; <CHARSET>]]]]]?>  
where
```

- *DATA* – Data to be encoded in the PDF417 format.
- *XSCALE* – Point(pt) per PDF417 module width. Default is 1 (1pt per module).
- *COLUMNS* – The number of columns to be used in the generated PDF417 symbol. Default is -1.
- *ROWS* – The number of rows to be used in the generated PDF417 symbol. Default is -1.
- *CHARSET* – (Optional) Character set to be used to encode data with the Byte compaction mode. Specify *CHARSET* only if the data contains non-Latin-1(ISO-8859-1) characters.

## Get Started

This chapter describes the concepts of associating XML data to layout elements in a report template. It describes basic techniques as well as advanced techniques for creating complex and highly conditionalized report formats.

If you are using Microsoft Word to create RTF templates, then see [Create RTF Templates Using the Template Builder for Word](#) before reading this chapter. The demos and samples provided in the Template Builder installation can help orient you to the process of creating templates in Microsoft Word.

You don't need Microsoft Word or the Template Builder to create RTF templates and this chapter describes how to add components without using the Template Builder. Many of the layout components described in this chapter can also be inserted in a template using the Template Builder.

This section covers the following topics:

- [What Are RTF Templates?](#)
- [Prerequisites for Designing Templates](#)
- [What is XSLT Compatibility?](#)
- [Key Concepts](#)
- [Design the Template Layout](#)
- [About Adding Publisher Code](#)

## What Are RTF Templates?

Rich Text Format (RTF) is a specification used by common word processing applications, such as Microsoft Word.

When you save a document, RTF is a file type option.

Publisher converts documents saved as the RTF file type to XSL-FO enabling you to create report layouts using many standard word processor features.

During design time, you add data fields and other markup to the template using Publisher's simplified tags for XSL expressions. These tags associate the XML report data to the report layout and include other processing instructions.

In addition to the word processor's formatting features, Publisher supports other advanced reporting features such as conditional formatting, dynamic data columns, running totals, and charts.

If you are familiar with XSL and prefer not to use the simplified tags, Publisher also supports the use of pure XSL elements in the template. If you want to include code directly in the template, then you can include *any* XSL element, many FO elements, and a set of SQL expressions that Publisher extends.

## Prerequisites for Designing Templates

You must perform these tasks before designing a template.

Before you design a template, you must:

- Know the business rules that apply to the data from the source report.

- Generate sample data from the report data model.  
Be familiar with the formatting features of Microsoft Word.

## What is XSLT Compatibility?

Publisher uses the XSLT processor provided by Oracle XDK 11.1.0.7.0, which supports the W3C XSL Transformations 1.0 recommendation.

The processor also implements the current working drafts of the XSLT and XPath 2.0 standards.

By default, Publisher is compatible with XSLT 1.0. If you want to use XSLT and XPath 2.0 features in the template, then you must disable XSLT 1.0 compatibility. This configuration is performed at the template level. The template-level setting overrides the server setting.

XSLT compatibility is set as a Build Option in the Template Builder for Word. See [Set UI Options](#).

## Key Concepts

When you design the template layout, you must understand how to associate the XML input file to the layout.

This chapter presents a sample template layout with its input XML file to illustrate how to make the proper associations to add the markup tags to the template.

## Design the Template Layout

Use the word processor's formatting features to create the design.

For example:

- Select the size, font, and alignment of text
- Insert bullets and numbering
- Draw borders around paragraphs
- Include a watermark
- Include images (jpg, gif, or png)
- Use table auto formatting features
- Insert a header and footer

## About Adding Publisher Code

When you create an RTF template, you add Publisher code to the RTF document. Follow one of these methods to add code.

Publisher supports the following methods for adding code:

- Basic RTF Method  
Use any word processor that supports RTF version 1.6 writer (or later) to design a template using Publisher's simplified syntax.
- Form Field Method

Using Microsoft Word's form field feature allows you to place the syntax in hidden form fields, rather than directly into the design of the template.


If you use XSL or XSL-FO code rather than the simplified syntax, then you must use the form field method.

This chapter describes how to create RTF templates using the preceding methods.

If you are using Microsoft Word, you can use the Publisher Template Builder for Word to facilitate inserting Publisher code fields.

## Associate the XML Data to the Template Layout

The figure in this section shows a sample layout for a Payables Invoice Register.

		Payables Invoice Register		Page 1 of 1 25 <sup>th</sup> July 2003	
Group: Suppliers		Sort by Supplier			
Supplier: Supplier 1					
Invoice Num	Invoice Date	GL Date	Curr	Entered Amt	Accounted Amt
Group:Invoices 1234566	1-Jan-2004	1-Jan-2004	USD	1000.00	1000.00
				End:Invoices	
Total for Supplier: Supplier1				1000.00	1000.00
End:Suppliers					

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Note the following:

- The data fields that are defined on the template.  
For example: Supplier, Invoice Number, and Invoice Date
- The elements of the template that are repeated when the report is run.  
For example, all the fields on the template are repeated for each Supplier that is reported.  
Each row of the invoice table is repeated for each invoice that is reported.

## Use an XML Input File

Following is the XML file that is used as input to the Payables Invoice Register report template.

To simplify the example, the XML output shown has been modified from the actual output from the Payables report.

```
<?xml version="1.0" encoding="WINDOWS-1252" ?>
- <VENDOR_REPORT>
- <LIST_G_VENDOR_NAME>
```

```

- <G_VENDOR_NAME>
  <VENDOR_NAME>COMPANY A</VENDOR_NAME>
- <LIST_G_INVOICE_NUM>
  <G_INVOICE_NUM>
    <SET_OF_BOOKS_ID>124</SET_OF_BOOKS_ID>
    <GL_DATE>10-NOV-03</GL_DATE>
    <INV_TYPE>Standard</INV_TYPE>
    <INVOICE_NUM>031110</INVOICE_NUM>
    <INVOICE_DATE>10-NOV-03</INVOICE_DATE>
    <INVOICE_CURRENCY_CODE>EUR</INVOICE_CURRENCY_CODE>
    <ENT_AMT>122</ENT_AMT>
    <ACCTD_AMT>122</ACCTD_AMT>
    <VAT_CODE>VAT22%</VAT_CODE>
  </G_INVOICE_NUM>
</LIST_G_INVOICE_NUM>
<ENT_SUM_VENDOR>1000.00</ENT_SUM_VENDOR>
<ACCTD_SUM_VENDOR>1000.00</ACCTD_SUM_VENDOR>
</G_VENDOR_NAME>
</LIST_G_VENDOR_NAME>
<ACCTD_SUM_REP>108763.68</ACCTD_SUM_REP>
<ENT_SUM_REP>122039</ENT_SUM_REP>
</VENDOR_REPORT>

```

XML files are composed of elements. Each tag set is an element. For example `<INVOICE_DATE>` `</INVOICE_DATE>` is the invoice date element. "INVOICE\_DATE" is the tag name. The data between the tags is the value of the element. For example, the value of INVOICE\_DATE is "10-NOV-03".

The elements of the XML file have a hierarchical structure. Another way of saying this is that the elements have parent-child relationships. In the XML sample, some elements are contained within the tags of another element. The containing element is the parent and the included elements are its children.

Every XML file has only one root element that contains all the other elements. In this example, VENDOR\_REPORT is the root element. The elements LIST\_G\_VENDOR\_NAME, ACCTD\_SUM\_REP, and ENT\_SUM\_REP are contained between the VENDOR\_REPORT tags and are children of VENDOR\_REPORT. Each child element can have child elements of its own.

## Identify Placeholders and Groups

Define placeholders to map the data fields. Define groups to designate the repeating elements.

The template content and layout must correspond to the content and hierarchy of the input XML file. Each data field in the template must map to an element in the XML file. Each group of repeating elements in the template must correspond to a parent-child relationship in the XML file.

Publisher supports regrouping of data if the report requires grouping that doesn't follow the hierarchy of the incoming XML data. For information on using this feature, see [Regroup the XML Data](#).

## Use Placeholders

Each data field in the report template must correspond to an element in the XML file.

When you mark up the template design, you define placeholders for the XML elements. The placeholder maps the template report field to the XML element. At runtime the placeholder is replaced by the value of the element of the same name in the XML data file.

For example, the "Supplier" field from the sample report layout corresponds to the XML element `VENDOR_NAME`. When you mark up the template, you create a placeholder for `VENDOR_NAME` in the position of the Supplier field. At runtime, this placeholder is replaced by the value of the element from the XML file (the value in the sample file is **COMPANY A**).

## Identify the Groups of Repeating Elements

The sample report lists suppliers and their invoices. There're fields that repeat for each supplier and invoice.

The report therefore consists of two groups of repeating fields:

- Fields that repeat for each supplier
- Fields that repeat for each invoice

The invoices group is nested inside the suppliers group. This can be represented as follows:

### Suppliers

- Supplier Name
- Invoices
  - Invoice Num
  - Invoice Date
  - GL Date
  - Currency
  - Entered Amount
  - Accounted Amount
- Total Entered Amount
- Total Accounted Amount

Compare this structure to the hierarchy of the XML input file. The fields that belong to the Suppliers group shown above are children of the element `G_VENDOR_NAME`. The fields that belong to the Invoices group are children of the element `G_INVOICE_NUM`.

By defining a group, you're notifying Publisher that *for each* occurrence of an element (parent), you want the included fields (children) displayed. At runtime, Publisher loops through the occurrences of the element and displays the fields each time.

## Add Markup to the Template Layout

Publisher converts the formatting that you apply in the word processor to XSL-FO. You add markup to create the mapping between the layout and the XML file and to include features that cannot be represented directly in the format.

The most basic markup elements are placeholders, to define the XML data elements; and groups, to define the repeating elements.

Publisher provides tags to add markup to the template. For the XSL equivalents of the Publisher tags, see [XSL Equivalents](#).

## Create Placeholders

The placeholder maps the template field to the XML element data field. At runtime the placeholder is replaced by the value of the element of the same name in the XML data file.

Enter placeholders in the document using the following syntax:

`<?XML element tag name?>`

The placeholder must match the XML element tag name exactly. It's case sensitive.

There're two ways to insert placeholders in the document:

- [Use the Basic RTF Method](#): Insert the placeholder syntax directly into the template document.
- [Use the Form Field Method](#): (Requires Microsoft Word) Insert the placeholder syntax in Microsoft Word's Text Form Field Options window. This method allows you to maintain the appearance of the template.

See [Insert a Field](#).

## Use the Basic RTF Method

Enter the placeholder syntax in the document where you want the XML data value to appear.

Enter the element's XML tag name using the syntax:

`<?XML element tag name?>`

In the example, the template field "Supplier" maps to the XML element `VENDOR_NAME`. In the document, enter:

`<?VENDOR_NAME?>`

The entry in the template is shown in the following illustration.

Supplier: <?VENDOR\_NAME?>

Invoice Num	Invoice

Total for Supplier:

## Use the Form Field Method

Placeholder tags can be added using the Form Field method.

To use Microsoft Word's Form Field method to insert the placeholder tags:

1. Enable the **Forms** toolbar in the Microsoft Word application.
2. Position the cursor in the location where you want to create a placeholder.

3. Select the **Text Form Field** toolbar icon. This action inserts a form field area in the document.
4. Double-click the form field area to invoke the **Text Form Field Options** dialog box.
5. Optional: Enter a description of the field in the **Default text** field. The entry in this field populates the placeholder's position on the template.

For the example, enter "Supplier 1".

6. Select the **Add Help Text** button.
7. In the help text entry field, enter the XML element's tag name using the syntax:

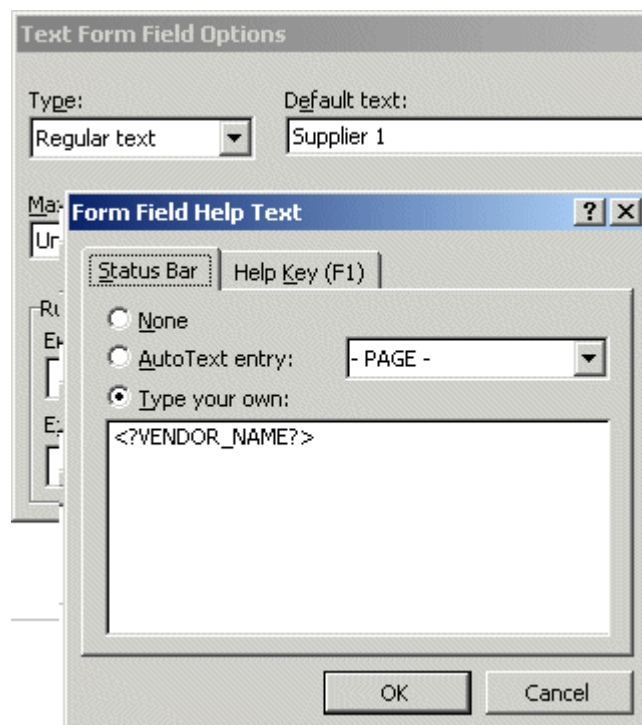
`<?XML element tag name?>`

You can enter multiple element tag names in the text entry field.

In the example, the report field "Supplier" maps to the XML element `VENDOR_NAME`. In the **Form Field Help Text** field enter:

`<?VENDOR_NAME?>`

The following illustration shows the Text Form Field Options dialog and the Form Field Help Text dialog with the appropriate entries for the Supplier field.



**Tip**

For longer strings of Publisher syntax, use the Help Key (F1) tab instead of the Status Bar tab. The text entry field on the Help Key (F1) tab allows more characters.

8. Click **OK** to apply.

The **Default text** is displayed in the form field on the template.



The following illustration shows the Supplier field from the template with the added form field markup.

## Complete the Form Field Method Example

This table shows the entries made to complete the form field method example. The Template Field Name is the display name from the template. The Default Text Entry is the value entered in the Default Text field of the Text Form Field Options dialog box (form field method only). The Placeholder Entry is the XML element tag name entered either in the Form Field Help Text field (form field method) or directly on the template.

Template Field Name	Default Text Entry (Form Field Method)	Placeholder Entry (XML Tag Name)
Invoice Num	1234566	<?INVOICE_NUM?>
Invoice Date	1-Jan-2004	<?INVOICE_DATE?>
GL Date	1-Jan-2004	<?GL_DATE?>
Curr	USD	<?INVOICE_CURRENCY_CODE?>
Entered Amt	1000.00	<?ENT_AMT?>
Accounted Amt	1000.00	<?ACCTD_AMT?>
(Total of Entered Amt column)	1000.00	<?ENT_SUM_VENDOR?>
(Total of Accounted Amt column)	1000.00	<?ACCTD_SUM_VENDOR?>

This figure shows the Payables Invoice Register with the completed form field placeholder markup. See [Use the Basic RTF Method](#) for the completed basic RTF markup.



## Payables Invoice Register

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25<sup>th</sup> January 2004Supplier: **Supplier 1**

Invoice Num	Invoice Date	GL Date	Curr	Entered Amt	Accounted Amt
1234566	1-Jan-2004	1-Jan-2004	USD	1000.00	1000.00
Total for Supplier: <b>Supplier1</b>				<b>1000.00</b>	<b>1000.00</b>

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## Define Groups

By defining a group, you notify Publisher that *for each* occurrence of an element, you want the included fields displayed. At runtime, Publisher loops through the occurrences of the element and displays the fields each time.

In the example, for each occurrence of G\_VENDOR\_NAME in the XML file, you want the template to display its child elements VENDOR\_NAME (Supplier Name), G\_INVOICE\_NUM (the Invoices group), Total Entered Amount, and Total Accounted Amount. And, for each occurrence of G\_INVOICE\_NUM (Invoices group), you want the template to display Invoice Number, Invoice Date, GL Date, Currency, Entered Amount, and Accounted Amount.

To designate a group of repeating fields, insert the grouping tags around the elements to repeat.

Insert the following tag before the first element:

```
<?for-each:XML group element tag name?>
```

Insert the following tag after the final element:

```
<?end for-each?>
```

See [Insert a Repeating Group](#).

## Group Scenarios

When grouping, note that the group element must be a parent of the repeating elements in the XML input file. These are some of the grouping scenarios.

- If you insert the grouping tags around text or formatting elements, then the text and formatting elements between the group tags are repeated.

- If you insert the tags around a table, then the table is repeated.
- If you insert the tags around text in a table cell, then the text in the table cell between the tags is repeated.
- If you insert the tags around two different table cells, but in the same table row, then the single row is repeated.
- If you insert the tags around two different table rows, then the rows between the tags are repeated (this doesn't include the row that contains the "end group" tag).

## Use the Basic RTF Method

Enter the tags in the document to define the beginning and end of the repeating element group.

To create the Suppliers group in the example, insert the tag:

```
<?for-each:G_VENDOR_NAME?>
```

before the Supplier field that you previously created.

Insert `<?end for-each?>` in the document after the summary row.

The following illustration shows the Payables Invoice Register with the basic RTF grouping and placeholder markup.



### Payables Invoice Register

Page 1 of 1  
25<sup>th</sup> January 2004

```
<?for-each:G_VENDOR_NAME?>    <?sort:VENDOR_NAME?>
```

Supplier: <?VENDOR\_NAME?>

Invoice Num	Invoice Date	GL Date	Curr	Entered Amt	Accounted Amt
<?for-each: G_INVOICE_NUM?> <?INVOICE_NUM?>	<?INVOICE_D ATE?>	<?GL_DATE?>	<?INV OICE CUR REN CY C ODE? >	<?ENT_AMT?>	<?ACCTD_AMT?> <?end for-each?>

Total for Supplier: <?VENDOR_NAME?>	<?ENT_SUM_VEND OR?>	<?ACCTD_SUM V ENDOR?>
-------------------------------------	------------------------	--------------------------

```
<?end for-each?>
```

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## Use the Form Field Method

You can define a group using the Form Field method.

To use Microsoft Word's Form Field method to defining a group:

1. Insert a form field to designate the beginning of the group.

In the help text field enter:

```
<?for-each:group element tag name?>
```

To create the Suppliers group in the example, insert a form field before the Suppliers field that you previously created. In the help text field enter:

```
<?for-each:G_VENDOR_NAME?>
```

For the example, enter the Default text "Group: Suppliers" to designate the beginning of the group on the template. Default text is optional, but can make the template easier to read.

2. Insert a form field after the final placeholder element in the group. In the help text field enter `<?end for-each?>`.

For the example, enter the Default text "End: Suppliers" after the summary row to designate the end of the group on the template.

The following figure shows the template after the markup to designate the Suppliers group was added.

Group: Suppliers

Supplier: Supplier 1

Invoice Num	Invoice
1234566	1-Jan-

End:Suppliers

## Complete the Example

The second group in the example is the invoices group. The repeating elements in this group are displayed in the table. For each invoice, the table row should repeat. Create a group within the table to contain these elements.

For each invoice, only the table row should repeat, not the entire table. Placing the grouping tags at the beginning and end of the table row repeats only the row. If you place the tags around the table, then for each new invoice the entire table with headings is repeated.

To mark up the example, insert the grouping tag `<?for-each:G_INVOICE_NUM?>` in the table cell before the Invoice Num placeholder. Enter the Default text Group:Invoices to designate the beginning of the group.

Insert the end tag inside the final table cell of the row after the Accounted Amt placeholder. Enter the Default text End:Invoices to designate the end of the group.

The following figure shows the completed example using the form field method.



## Payables Invoice Register

Page 1 of 1  
25<sup>th</sup> July 2003

Group: Suppliers    Sort by: Supplier

Supplier: **Supplier 1**

Invoice Num	Invoice Date	GL Date	Curr	Entered Amt	Accounted Amt
Group:Invoices 1234566	1-Jan-2004	1-Jan-2004	USD	1000.00	1000.00
				End:Invoices	

Total for Supplier: <b>Supplier1</b>				<b>1000.00</b>	<b>1000.00</b>
--------------------------------------	--	--	--	----------------	----------------

End:Suppliers

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## Define Headers and Footers

You can define headers and footers as part of the template.

This section covers the following topics:

- [Native Support for Headers and Footers](#)
- [Insert Placeholders in the Headers and Footers](#)
- [Create Multiple or Complex Headers and Footers](#)
- [Define Different First Page, Odd Pages, and Even Pages](#)

## Native Support for Headers and Footers

You can use native RTF header and footer in the report.

To create a header or footer, use the word processor's header and footer insertion tools. As an alternative, or if you have multiple headers and footers, you can use start:body and end body tags to distinguish the header and footer regions from the body of the report.

## Insert Placeholders in the Headers and Footers

At the time of this writing, Microsoft Word doesn't support form fields in the header and footer.

You must therefore insert the placeholder syntax directly into the template (basic RTF method), or use the start body/end body syntax described in the next section.

## Create Multiple or Complex Headers and Footers

You can create multiple or complex headers and footers in the template by using Publisher tags to define the body area of the report. You can include complex objects in the form fields for the header and footer. When you define the body area, the elements occurring before the

beginning of the body area compose the header. The elements occurring after the body area compose the footer.

Use the following tags to enclose the body area of the report:

```
<?start:body?>
```

```
<?end body?>
```

Use the tags either directly in the template, or in form fields.

The Payables Invoice Register contains a simple header and footer and therefore doesn't require the start body/end body tags. However, if you wanted to add another header to the template, define the body area.

Perform the following steps to define the body area:


1. Insert `<?start:body?>` before the Suppliers group tag:

```
<?for-each:G_VENDOR_NAME?>
```

2. Insert `<?end body?>` after the Suppliers group closing tag:

```
<?end for-each?>
```

The following figure shows the Payables Invoice Register with the start body/end body tags inserted:



**Payables Invoice Register**

Page 1 of 1  
 25<sup>th</sup> July 2003

```
<?start:body?>
```

Group: Suppliers    Sort by Supplier

Supplier: **Supplier 1**

Invoice Num	Invoice Date	GL Date	Curr	Entered Amt	Accounted Amt
Group:Invoices 1234566	1-Jan-2004	1-Jan-2004	USD	1000.00	1000.00
				End:Invoices	
Total for Supplier: Supplier1				1000.00	1000.00

End:Suppliers  

```
<?end body?>
```

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## Define Different First Page, Odd Pages, and Even Pages

If the report requires a different header and footer on the first page of the report; or, if the report requires different headers and footers for odd and even pages, then you can define different page setup for first page, odd pages, and even pages using Microsoft Word's Page Setup dialog. This feature is supported for PDF and RTF output only.

1. Select **Page Setup** from the **File** menu.
2. In the Page Setup dialog, select the **Layout** tab.
3. In the **Headers and footers** region of the dialog, select the appropriate check box:

Different odd and even

Different first page

4. Insert the headers and footers into the template as desired.

At run time the generated report exhibits the defined header and footer behavior.

## Insert Images and Charts

Publisher supports several methods for including images in the published document.

The following sections describe these options:

- [Directly Insert Images](#)
- [Insert Images with URL References](#)
- [Insert Images with an Element Reference from an XML File](#)
- [Render an Image Retrieved from BLOB Data](#)
- [Add Charts to Templates](#)

### Directly Insert Images

Insert the jpg, gif, or png image directly in the template.

Note that if you insert an image to an RTF template, and set the **Wrap Text** property of the image to a value other than **In Line With Text**, the PowerPoint output won't contain the image.

### Insert Images with URL References

Include an alternative text link for an image.

To insert images with URL references:

1. Insert a dummy image in the template.
2. In Microsoft Word's Format Picture dialog box select the **Web** tab. Enter the following syntax in the **Alternative text** region to reference the image URL:

```
url:{'http://<image location>'}
```

For example, enter:

```
url:{'http://www.example.com/images/ora_log.gif'}
```

### Insert Images with an Element Reference from an XML File

Include a link to an XML file for an image.

To insert images with element references:

1. Insert a dummy image in the template.
2. In Microsoft Word's Format Picture dialog box select the **Web** tab. Enter the following syntax in the **Alternative text** region to reference the image URL:

```
url:{IMAGE_LOCATION}
```

where *IMAGE\_LOCATION* is an element from the XML file that holds the full URL to the image.

You can also build a URL based on multiple elements at runtime. Just use the concat function to build the URL string. For example:

```
url:{concat(SERVER,'/',IMAGE_DIR,'/',IMAGE_FILE)}
```

where *SERVER*, *IMAGE\_DIR*, and *IMAGE\_FILE* are element names from the XML file that hold the values to construct the URL.

This method can also be used with the *OA\_MEDIA* reference as follows:

```
url:{concat('${OA_MEDIA}','/',IMAGE_FILE)}
```

## Render an Image Retrieved from BLOB Data

You can include an image stored as a BLOB in a form.

If results XML contains image data that had been stored as a BLOB in the database, then use the following syntax in a form field inserted in the template where you want the image to render at runtime:

```
<fo:instream-foreign-object content-type="image/jpg">
<xsl:value-of select="IMAGE_ELEMENT"/>
</fo:instream-foreign-object>
```

where

*image/jpg* is the MIME type of the image (other options might be: *image/gif* and *image/png*)

and

*IMAGE\_ELEMENT* is the element name of the BLOB in the XML data.

Note that you can specify height and width attributes for the image to set its size in the published report. The image fits the box size that you define. For example, to set the size of the example above to three inches by four inches, enter the following:

```
<fo:instream-foreign-object content-type="image/jpg" height="3 in" width="4 in">
<xsl:value-of select="IMAGE_ELEMENT"/>
</fo:instream-foreign-object>
```

Specify in pixels as follows:

```
<fo:instream-foreign-object content-type="image/jpg" height="300 px" width="4 px">
...
```

or in centimeters:

```
<fo:instream-foreign-object content-type="image/jpg" height="3 cm" width="4 cm">
...
```

or as a percentage of the original dimensions:

```
<fo:instream-foreign-object content-type="image/jpg" height="300%" width="300%">
...
```



## Add Charts to Templates

Follow these steps to add a chart to the template.

The following list summarizes the steps to add a chart to the template. These steps are discussed in detail in this section with an example.

1. Insert a dummy image in the template to define the size and position of the chart.
2. Add the definition for the chart to the Alternative text box of the dummy image. The chart definition requires XSL commands.
3. At runtime Publisher calls the charting engine to render the image that is then inserted into the final output document.

Note that RTF output is limited to raster images. PDF and HTML output support raster and vector images.

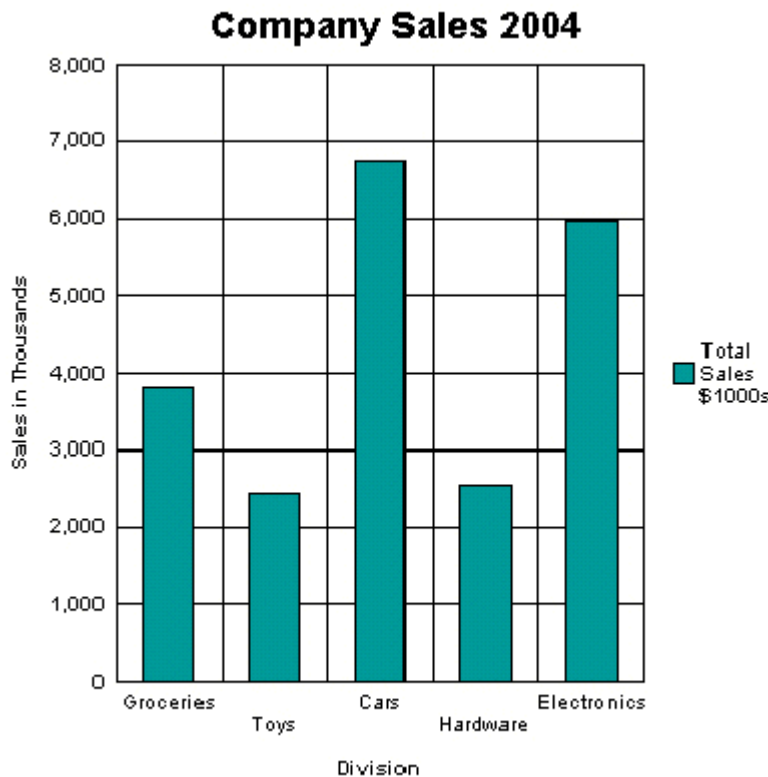
### Add a Sample Chart

Follow this illustration to add a sample chart.

Following is a piece of XML data showing total sales by company division.

```
<sales year=2004>
  <division>
    <name>Groceries</name>
    <totalsales>3810</totalsales>
    <costofsales>2100</costofsales>
  </division>
  <division>
    <name>Toys</name>
    <totalsales>2432</totalsales>
    <costofsales>1200</costofsales>
  </division>
  <division>
    <name>Cars</name>
    <totalsales>6753</totalsales>
    <costofsales>4100</costofsales>
  </division>
  <division>
    <name>Hardware</name>
    <totalsales>2543</totalsales>
    <costofsales>1400</costofsales>
  </division>
  <division>
    <name>Electronics</name>
    <totalsales>5965</totalsales>
    <costofsales>3560</costofsales>
  </division>
</sales>
```

This example describes how to insert a chart into the template to display it as a vertical bar chart, as shown in the following bar chart.



Note the following attributes of this chart:

- The style is a vertical bar chart.
- The chart displays a background grid.
- The components are colored.
- Sales totals are shown as Y-axis labels.
- Divisions are shown as X-axis labels.
- The chart is titled.
- The chart displays a legend.

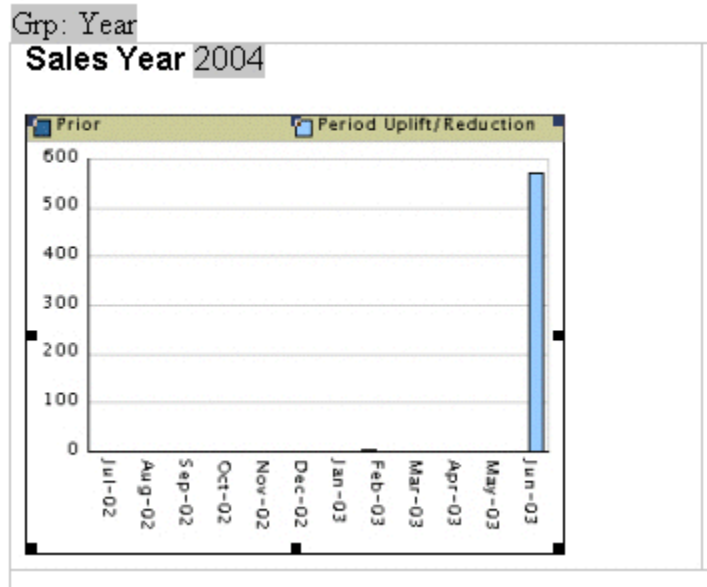
Each of these properties can be customized to suit individual report requirements.

## Insert the Dummy Image

You must insert the dummy image as a "Picture" and not any other kind of object.

The first step is to add a dummy image to the template in the position you want the chart to appear. The image size defines how large the chart image is in the final document.

The following illustration shows an example of a dummy image.



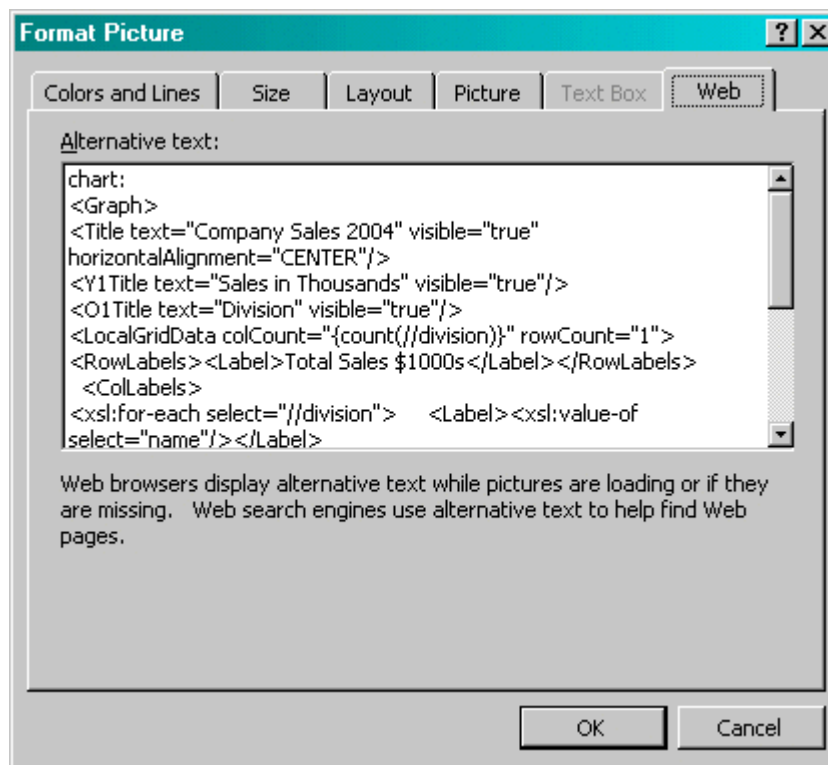
The image can be embedded inside a for-each loop like any other form field if you want the chart to be repeated in the output based on the repeating data. In this example, the chart is defined within the sales year group so that a chart is generated for each year of data present in the XML file.

Right-click the image to open the **Format Picture** palette and select the **Web** tab. Use the **Alternative text** entry box to enter the code to define the chart characteristics and data definition for the chart.

## Add Code to the Alternative Text Box

An **Alternative text** box is a text field that contains code, the content of which is rendered as a chart in the final document.

The following figure shows an example of the Publisher code in the Format Picture Alternative text box.



The content of the **Alternative text** represents the chart that is rendered in the final document. For this chart, the text is as follows:

```
chart:
<Graph graphType = "BAR_VERT_CLUST">
<Title text="Company Sales 2004" visible="true" horizontalAlignment="CENTER"/>
<Y1Title text="Sales in Thousands" visible="true"/>
<O1Title text="Division" visible="true"/>
<LocalGridData colCount="{count(//division)}" rowCount="1">
<RowLabels>
<Label>Total Sales $1000s</Label>
</RowLabels>
<ColLabels>
<xsl:for-each select="//division">
<Label>
<xsl:value-of select="name"/>
</Label>
</xsl:for-each>
</ColLabels>
<DataValues>
<RowData>
<xsl:for-each select="//division">
<Cell>
<xsl:value-of select="totalsales"/>
</Cell>
</xsl:for-each>
</RowData>
</DataValues>
```

```
</LocalGridData>
</Graph>
```

The first element of the chart text must be the chart: element to inform the RTF parser that the following code describes a chart object.

Next is the opening <Graph> tag. Note that the whole of the code resides within the tags of the <Graph> element. This element has an attribute to define the chart type: `graphType`. If this attribute isn't declared, the default chart is a vertical bar chart. BI Beans supports many different chart types. Several more types are presented in this section. For a complete listing, see the BI Beans graph DTD documentation.

The following code section defines the chart type and attributes:

```
<Title text="Company Sales 2004" visible="true" horizontalAlignment="CENTER"/>
<Y1Title text="Sales in Thousands" visible="true"/>
<O1Title text="Division" visible="true"/>
```

All of these values can be declared or you can substitute values from the XML data at runtime. For example, you can retrieve the chart title from an XML tag by using the following syntax:

```
<Title text="{CHARTTITLE}" visible="true" horizontalAlignment="CENTER"/>
```

where "CHARTTITLE" is the XML tag name that contains the chart title. Note that the tag name is enclosed in curly braces.

The next section defines the column and row labels:

```
<LocalGridData colCount="{count(//division)}" rowCount="1">
  <RowLabels>
    <Label>Total Sales $1000s</Label>
  </RowLabels>
  <ColLabels>
    <xsl:for-each select="//division">
      <Label>
        <xsl:value-of select="name"/>
      </Label>
    </xsl:for-each>
  </ColLabels>
```

The `LocalGridData` element has two attributes: `colCount` and `rowCount`. These define the number of columns and rows that are shown at runtime. In this example, a count function calculates the number of columns to render:

```
colCount="{count(//division)}"
```

The `rowCount` is hard-coded to 1. This value defines the number of sets of data to be charted. In this case it's 1.

Next the code defines the row and column labels. These can be declared, or a value from the XML data can be substituted at runtime. The row label is used in the chart legend (that is, "Total Sales \$1000s").

The column labels for this example are derived from the data: Groceries, Toys, Cars, and so on. This is done using a for-each loop:

```
<ColLabels>
  <xsl:for-each select="//division">
    <Label>
      <xsl:value-of select="name"/>
    </Label>
  </xsl:for-each>
</ColLabels>
```

This code loops through the <division> group and inserts the value of the <name> element into the <Label> tag. At runtime, this code generates the following XML:

```
<ColLabels>
  <Label>Groceries</Label>
  <Label>Toys</Label>
  <Label>Cars</Label>
  <Label>Hardware</Label>
  <Label>Electronics</Label>
</ColLabels>
```

The next section defines the actual data values to chart:

```
<DataValues>
  <RowData>
    <xsl:for-each select="//division">
      <Cell>
        <xsl:value-of select="totalsales"/>
      </Cell>
    </xsl:for-each>
  </RowData>
</DataValues>
```

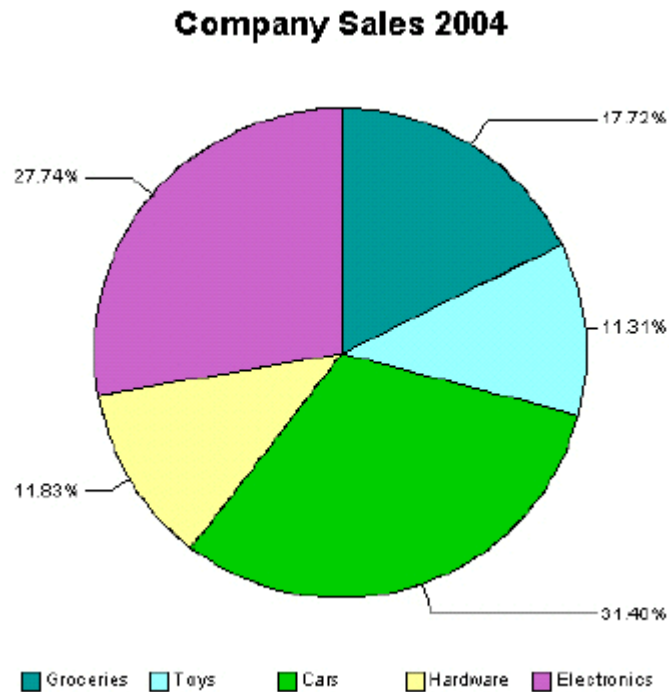
Similar to the labels section, the code loops through the data to build the XML that is passed to the BI Beans rendering engine. This code generates the following XML:

```
<DataValues>
  <RowData>
    <Cell>3810</Cell>
    <Cell>2432</Cell>
    <Cell>6753</Cell>
    <Cell>2543</Cell>
    <Cell>5965</Cell>
  </RowData>
</DataValues>
```

## Add Chart Samples

Follow the sample pie chart to understand how you can display the data in a pie chart.

You can also display this data in a pie chart as shown in the following figure.

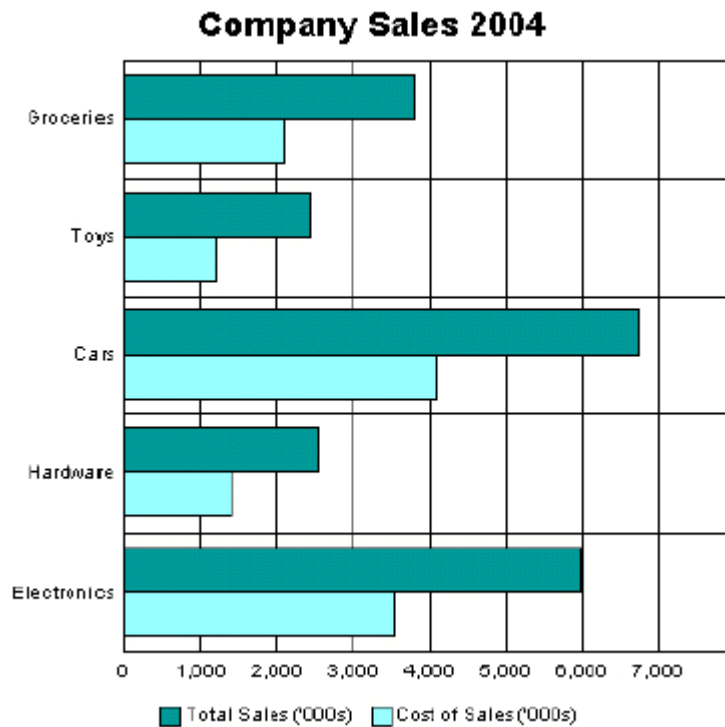


The following is the code added to the template to render this chart at runtime:

```
chart:
<Graph graphType="PIE">
<Title text="Company Sales 2004" visible="true"
  horizontalAlignment="CENTER"/>
<LocalGridData rowCount="{count(//division)}" colCount="1">
  <RowLabels>
    <xsl:for-each select="//division">
      <Label>
        <xsl:value-of select="name"/>
      </Label>
    </xsl:for-each>
  </RowLabels>
  <DataValues>
    <xsl:for-each select="//division">
      <RowData>
        <Cell>
          <xsl:value-of select="totalsales"/>
        </Cell>
      </RowData>
    </xsl:for-each>
  </DataValues>
</LocalGridData>
</Graph>
```

## Horizontal Bar Chart Sample

This example shows total sales and cost of sales charted in a horizontal bar format. This also adds the data from the cost of sales element (<costofsales>) to the chart.



The following code defines this chart in the template:

chart:

```

<Graph graphType = "BAR_HORIZ_CLUST">
  <Title text="Company Sales 2004" visible="true" horizontalAlignment="CENTER"/>
  <LocalGridData colCount="{ count(//division) }" rowCount="2">
    <RowLabels>
      <Label>Total Sales ('000s)</Label>
      <Label>Cost of Sales ('000s)</Label>
    </RowLabels>
    <ColLabels>
      <xsl:for-each select="//division">
        <Label><xsl:value-of select="name"/></Label>
      </xsl:for-each>
    </ColLabels>
    <DataValues>
      <RowData>
        <xsl:for-each select="//division">
          <Cell><xsl:value-of select="totalsales"/></Cell>
        </xsl:for-each>
      </RowData>
      <RowData>
        <xsl:for-each select="//division">
          <Cell><xsl:value-of select="costofsales"/></Cell>
        </xsl:for-each>
      </RowData>
    </DataValues>
  </LocalGridData>
</Graph>
  
```

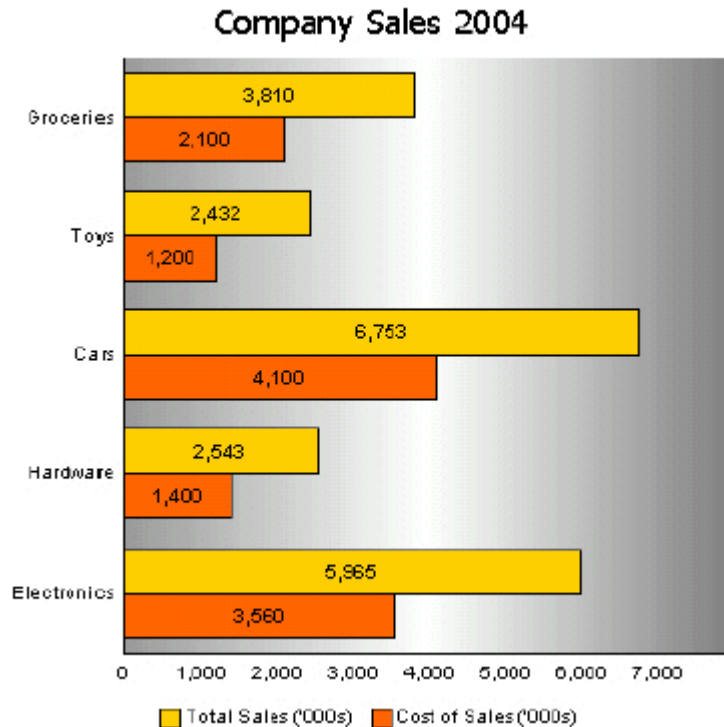


To accommodate the second set of data, the `rowCount` attribute for the `LocalGridData` element is set to 2. Also note the `DataValues` section defines two sets of data: one for Total Sales and one for Cost of Sales.

## Change the Appearance of the Chart

There're many attributes available from the BI Beans graph DTD that you can manipulate to change the look and feel of the chart.

For example, the previous chart can be changed to remove the grid, place a graduated background, and change the bar colors and fonts, as shown in the following figure:



The code to support this is as follows:

```
chart:
<Graph graphType = "BAR_HORIZ_CLUST">
<SeriesItems>
<Series id="0" color="#ffcc00"/>
<Series id="1" color="#ff6600"/>
</SeriesItems>
<O1MajorTick visible="false"/>
<X1MajorTick visible="false"/>
<Y1MajorTick visible="false"/>
<Y2MajorTick visible="false"/>
<MarkerText visible="true" markerTextPlace="MTP_CENTER"/>
<PlotArea borderTransparent="true">
<SFX fillType="FT_GRADIENT" gradientDirection="GD_LEFT"
gradientNumPins="300">
<GradientPinStyle pinIndex="1" position="1"
gradientPinLeftColor="#999999"
```

```

    gradientPinRightColor="#cc6600"/>
  </SFX>
</PlotArea>
<Title text="Company Sales 2004" visible="true">
  <GraphFont name="Tahoma" bold="false"/>
</Title>
...
</Graph>

```

The colors for the bars are defined in the SeriesItems section. The colors are defined in hexadecimal format as follows:

```

<SeriesItems>
  <Series id="0" color="#ffcc00"/>
  <Series id="1" color="#ff6600"/>
</SeriesItems>

```

The following code hides the chart grid:

```

<O1MajorTick visible="false"/>
<X1MajorTick visible="false"/>
<Y1MajorTick visible="false"/>
<Y2MajorTick visible="false"/>

```

The MarkerText tag places the data values on the chart bars:

```

<MarkerText visible="true" markerTextPlace="MTP_CENTER"/>

```

The PlotArea section defines the background. The SFX element establishes the gradient and the borderTransparent attribute hides the plot border:

```

<PlotArea borderTransparent="true">
  <SFX fillType="FT_GRADIENT" gradientDirection="GD_LEFT"
    gradientNumPins="300">
    <GradientPinStyle pinIndex="1" position="1"
      gradientPinLeftColor="#999999"
      gradientPinRightColor="#cc6600"/>
    </SFX>
  </PlotArea>

```

The Title text tag has also been updated to specify a new font type and size:

```

<Title text="Company Sales 2004" visible="true">
  <GraphFont name="Tahoma" bold="false"/>
</Title>

```

## Add Drawings, Shapes, and Clip Art

Publisher supports Microsoft Word drawing, shape, and clip art features. You can add these objects to the template and they're rendered in the final PDF output or HTML output (not supported for other output types).

The following AutoShape categories are supported:

- Lines - Straight, arrows, connectors, curve, free form, and scribble.
- Connectors - Straight connectors only are supported. Curved connectors can be achieved by using a curved line and specifying the end styles to the line.
- Basic Shapes - All shapes are supported. You can't include images inside the shape objects.
- Block arrows - All arrows are supported.
- Flowchart - All flowchart objects are supported.
- Stars and Banners - All objects are supported.
- Callouts - The "line" callouts are not supported.
- Clip Art - Add images to the templates using the Microsoft Clip Art libraries.

## Add Freehand Drawings

The freehand drawing tool helps you create drawings to the final PDF.

Use the freehand drawing tool in Microsoft Word to create drawings in the template to be rendered in the final PDF output.

## Add Hyperlinks

This section explains on how to add hyperlinks to shapes.

See [Insert Hyperlinks](#).

## Layer Shapes

You can layer shapes on top of each other and use the transparency setting in Microsoft Word to allows shapes on lower layers to show through.

The following illustration shows an example of layered shapes.



## Use 3-D Effects

Publisher doesn't support the 3-D option for shapes.

## Add Microsoft Equations

Use the equation editor to generate equations in the output.

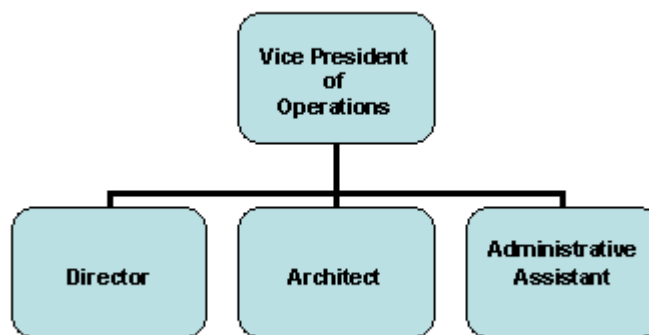
The following figure shows an example of an equation:

$$\sigma = \sqrt{\frac{1}{N} \sum_{i=1}^N \left( x_i - \bar{x} \right)^2}$$

## Add Organization Charts

Use the organization chart functionality of Microsoft Word in the templates and the chart that is rendered in the output.

The following figure shows an example of an organization chart.



## Add WordArt

You can use Microsoft Word's WordArt functionality in the templates.

Some Microsoft WordArt uses a bitmap operation that currently can't be converted to SVG. To use the unsupported WordArt in the template, you can take a screenshot of the WordArt then save it as an image (gif, jpeg, or png) and replace the WordArt with the image.

The following figure shows a sample WordArt example.



## Add Data-Driven Shapes

In addition to supporting the static shapes and features in the templates, Publisher supports the manipulation of shapes based on incoming data or parameters, as well.

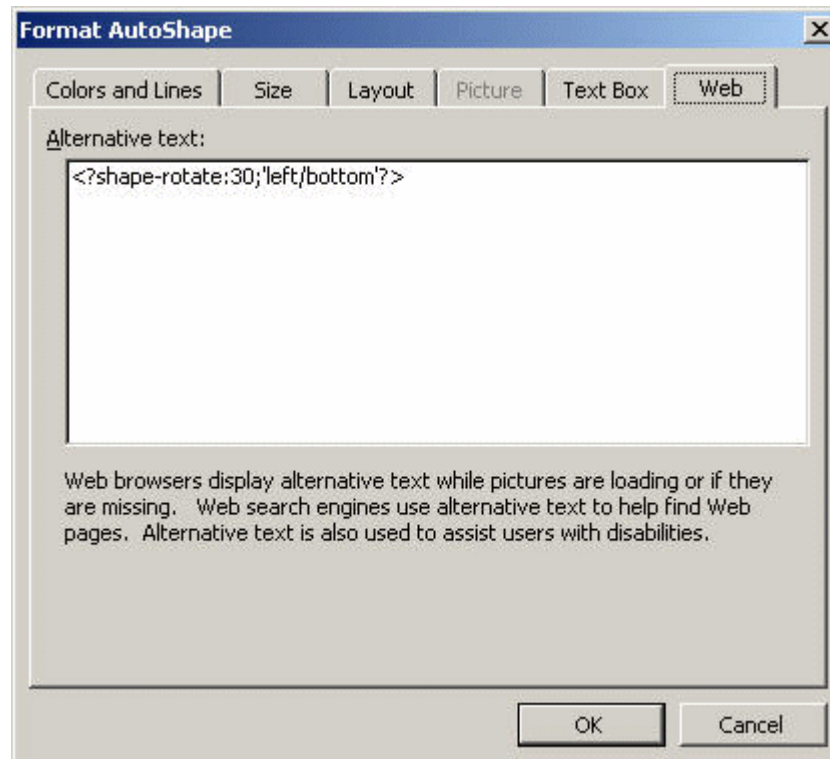
The following manipulations are supported:

- Replicate
- Move
- Change size
- Add text
- Skew
- Rotate

These manipulations not only apply to single shapes, but you can use the group feature in Microsoft Word to combine shapes together and manipulate them as a group.

## Include Manipulation Commands

Enter manipulation commands for a shape in the **Web** tab of the shape's properties dialog as shown in this figure.



## Replicate Shapes

You can replicate a shape based on incoming XML data in the same way you replicate data elements in a for-each loop.

To replicate a shape, use a `for-each@shape` command in conjunction with a `shape-offset` declaration. For example, to replicate a shape down the page, use the following syntax:

```
<?for-each@shape:SHAPE_GROUP?>
<?shape-offset-y:(position()-1)*100?>
<?end for-each?>
```

where

`for-each@shape` opens the for-each loop for the shape context

`SHAPE_GROUP` is the name of the repeating element from the XML file. For each occurrence of the element `SHAPE_GROUP` a new shape is created.

`shape-offset-y:` is the command to offset the shape along the y-axis.

`(position()-1)*100` sets the offset in pixels per occurrence. The XSL `position` command returns the record counter in the group (that is 1,2,3,4); one is subtracted from that number and the result is multiplied by 100. Therefore for the first occurrence the offset would be 0:  $(1-1) * 100$ . The

offset for the second occurrence would be 100 pixels: (2-1) \*100. And for each subsequent occurrence the offset would be another 100 pixels down the page.

## Add Text to Shapes

You can add text to a shape dynamically either from the incoming XML data or from a parameter value.

In the Property dialog enter the following syntax:

```
<?shape-text:SHAPETEXT?>
```

where SHAPETEXT is the element name in the XML data. At runtime the text is inserted into the shape.

## Add Text Along a Path

You can add text along a line or curve from incoming XML data or a parameter.

After drawing the line, in the Property dialog enter:

```
<?shape-text-along-path:SHAPETEXT?>
```

where SHAPETEXT is the element from the XML data. At runtime the value of the element SHAPETEXT is inserted above and along the line.

## Move a Shape

You can move a shape or transpose it along both the x and y-axes based on the XML data.

For example to move a shape 200 pixels along the y-axis and 300 along the x-axis, enter the following commands in the property dialog of the shape:

```
<?shape-offset-x:300?>
```

```
<?shape-offset-y:200?>
```

## Rotate a Shape

You can rotate a shape about a specified axis based on the incoming data.

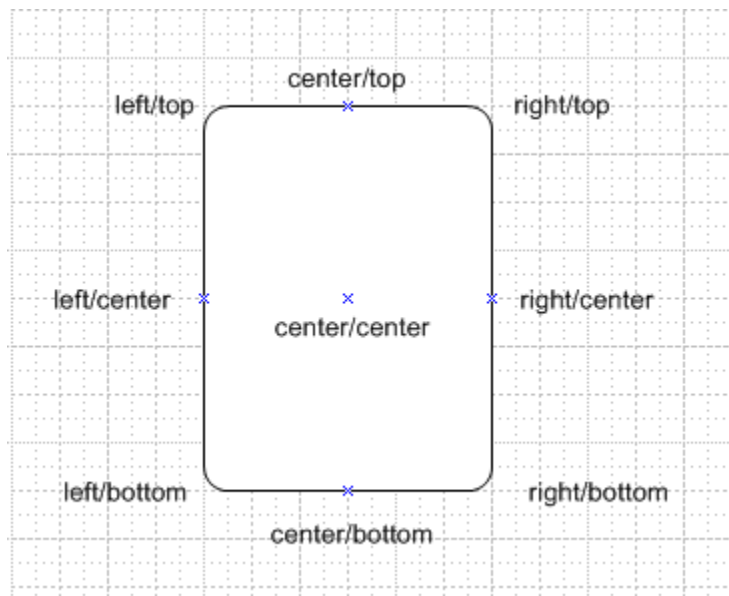
Use the following command:

```
<?shape-rotate:ANGLE;'POSITION'?>
```

where

ANGLE is the number of degrees to rotate the shape. If the angle is positive, the rotation is clockwise; if negative, the rotation is counterclockwise.

POSITION is the point about which to carry out the rotation, for example, 'left/top'. Valid values are combinations of left, right, or center with center, top, or bottom. The default is left/top. The following illustration shows these valid values.



To rotate this rectangle shape about the bottom right corner, enter the following syntax:

```
<?shape-rotate:60,'right/bottom'?>
```

You can also specify an x,y coordinate within the shape itself about which to rotate.

## Skew a Shape

You can skew a shape using the `skew` command.

You can skew a shape along its x or y axis using the following commands:

```
<?shape-skew-x:ANGLE;'POSITION'?>
```

```
<?shape-skew-y:ANGLE;'POSITION'?>
```

where

ANGLE is the number of degrees to skew the shape. If the angle is positive, the skew is to the right.

POSITION is the point about which to carry out the rotation, for example, 'left/top'. Valid values are combinations of left, right, or center with center, top, or bottom. See [Rotate a Shape](#). The default is 'left/top'.

For example, to skew a shape by 30 degrees about the bottom right hand corner, enter the following:

```
<?shape-skew-x:number(.)*30;'right/bottom'?>
```

## Change the Size of Shapes

You can change the size of a shape using the appropriate commands either along a single axis or both axes.



To change a shape's size along both axes, use:

```
<?shape-size:RATIO?>
```

where RATIO is the numeric ratio to increase or decrease the size of the shape. Therefore a value of 2 would generate a shape twice the height and width of the original. A value of 0.5 would generate a shape half the size of the original.

To change a shape's size along the x or y axis, use:

```
<?shape-size-x:RATIO?>
```

```
<?shape-size-y:RATIO?>
```

Changing only the x or y value has the effect of stretching or shrinking the shape along an axis. This can be data driven.

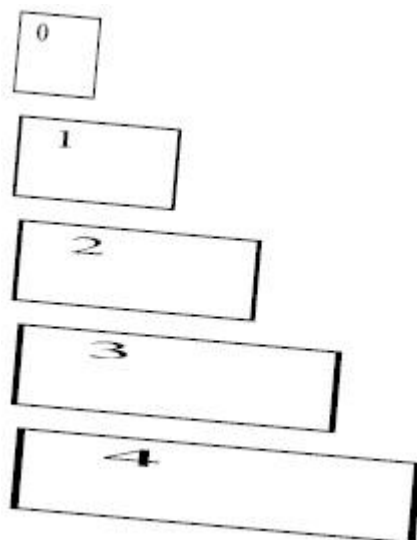
## Combine Commands

You can also combine these commands to carry out multiple transformations on a shape at one time. For example, you can replicate a shape and for each replication, rotate it by some angle and change the size at the same time.

The following example shows how to replicate a shape, move it 50 pixels down the page, rotate it by five degrees about the center, stretch it along the x-axis and add the number of the shape as text:

```
<for-each@shape:SHAPE_GROUP?>  
<?shape-text:position()?>  
<?shape-offset-y:position()*50?>  
<?shape-rotate:5;'center/center'?>  
<?shape-size-x:position()+1?>  
<end for-each?>
```

These commands generate the output shown in the following shape transformation figure:



## CD Ratings Example

This example demonstrates how to set up a template that generates a star-rating based on data from an incoming XML file.

Assume the following incoming XML data:

```
<CATALOG>
<CD>
  <TITLE>Empire Burlesque</TITLE>
  <ARTIST>Bob Dylan</ARTIST>
  <COUNTRY>USA</COUNTRY>
  <COMPANY>Columbia</COMPANY>
  <PRICE>10.90</PRICE>
  <YEAR>1985</YEAR>
  <USER_RATING>4</USER_RATING>
</CD>
<CD>
  <TITLE>Hide Your Heart</TITLE>
  <ARTIST>Bonnie Tylor</ARTIST>
  <COUNTRY>UK</COUNTRY>
  <COMPANY>CBS Records</COMPANY>
  <PRICE>9.90</PRICE>
  <YEAR>1988</YEAR>
  <USER_RATING>3</USER_RATING>
</CD>
<CD>
  <TITLE>Still got the blues</TITLE>
  <ARTIST>Gary More</ARTIST>
  <COUNTRY>UK</COUNTRY>
  <COMPANY>Virgin Records</COMPANY>
  <PRICE>10.20</PRICE>
  <YEAR>1990</YEAR>
  <USER_RATING>5</USER_RATING>
</CD>
<CD>
  <TITLE>This is US</TITLE>
  <ARTIST>Gary Lee</ARTIST>
  <COUNTRY>UK</COUNTRY>
  <COMPANY>Virgin Records</COMPANY>
  <PRICE>12.20</PRICE>
  <YEAR>1990</YEAR>
  <USER_RATING>2</USER_RATING>
</CD>
<CATALOG>
```

Notice the USER\_RATING element for each CD. Using this data element and the shape manipulation commands, you can create a visual representation of the ratings so that the reader can compare them at a glance. A template to achieve this is shown in the following visual representation of ratings figure:

Title	Artist	Rating
F TITLE	ARTIST	E 

The values for the fields are shown in the following values for fields table:

Field	Form Field Entry
F	<?for-each:CD?>
TITLE	<?TITLE?>
ARTIST	<?ARTIST?>
E	<?end for-each?>
(star shape)	Web Tab Entry: <?for-each@shape:xdoxslt:foreach_number(\$_XDOCTX,1,USER_RATING,1)?> <?shape-offset-x:(position()-1)*25?> <?end for-each?>

The form fields hold the simple element values. The only difference with this template is the value for the star shape. The replication command is placed in the **Web** tab of the Format AutoShape dialog.

In the for-each@shape command you can use a command to create a "for...next loop" construct. Specify 1 as the starting number; the value of USER\_RATING as the final number; and 1 as the step value. As the template loops through the CDs, it creates an inner loop to repeat a star shape for every USER\_RATING value (that is, a value of 4 generates 4 stars). The output from this template and the XML sample is shown in the following figure:

Title	Artist	Rating
Empire Burlesque	Bob Dylan	
Hide Your Heart	Bonnie Tylor	
Still got the blues	Gary More	
This is US	Gary Lee	

## Grouped Shape Example

This example shows how to combine shapes into a group and have them react to the incoming data both individually and as a group.

Assume the following XML data:

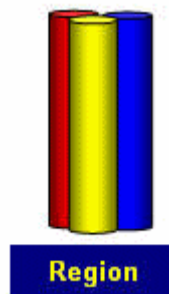
```
<SALES>
<SALE>
  <REGION>Americas</REGION>
  <SOFTWARE>1200</SOFTWARE>
```

```

<HARDWARE>850</HARDWARE>
<SERVICES>2000</SERVICES>
</SALE>
<SALE>
<REGION>EMEA</REGION>
<SOFTWARE>1000</SOFTWARE>
<HARDWARE>800</HARDWARE>
<SERVICES>1100</SERVICES>
</SALE>
<SALE>
<REGION>APAC</REGION>
<SOFTWARE>900</SOFTWARE>
<HARDWARE>1200</HARDWARE>
<SERVICES>1500</SERVICES>
</SALE>
</SALES>

```

You can create a visual representation of this data so that users can very quickly understand the sales data across all regions. Do this by first creating the composite shape in Microsoft Word that you want to manipulate. The following figure shows a composite shape comprising four components:



The shape consists of three cylinders: red, yellow, and blue. These represent the data elements software, hardware, and services. The combined object also contains a rectangle that is enabled to receive text from the incoming data.

The following commands are entered into the **Web** tab:

Red cylinder: `<?shape-size-y:SOFTWARE div 1000;'left/bottom'?'>`

Yellow cylinder: `<?shape-size-y:HARDWARE div 1000;'left/bottom'?'>`

Blue cylinder: `<?shape-size-y:SERVICES div 1000;'left/bottom'?'>`

The shape-size command is used to stretch or shrink the cylinder based on the values of the elements SOFTWARE, HARDWARE, and SERVICES. The value is divided by 1000 to set the stretch or shrink factor. For example, if the value is 2000, divide that by 1000 to get a factor of 2. The shape generates as twice its current height.

The text-enabled rectangle contains the following command in its **Web** tab:

`<?shape-text:REGION?'>`

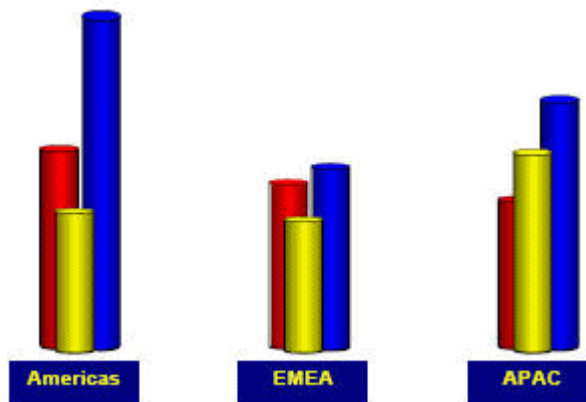
At runtime the value of the REGION element is displayed in the rectangle.

All of these shapes were then grouped together and in the **Web** tab for the grouped object, the following syntax is added:

```
<?for-each@shape:SALE?>  
<?shape-offset-x:(position()-1)*110?>  
<?end for-each?>
```

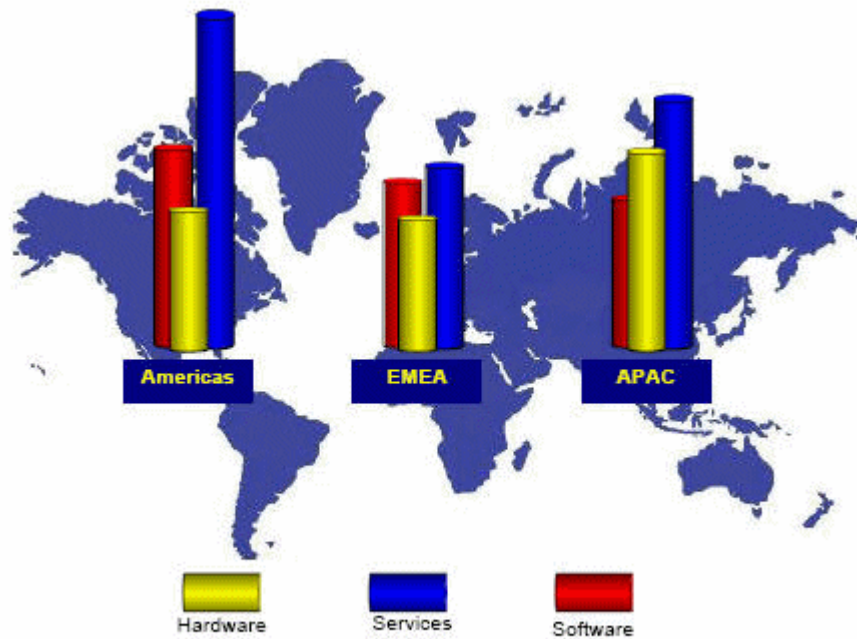
In this set of commands, the `for-each@shape` loops over the `SALE` group. The `shape-offset` command moves the next shape in the loop to the right by a specific number of pixels. The expression `(position()-1)` sets the position of the object. The `position()` function returns a record counter while in the loop, so for the first shape, the offset would be  $1-1*110$ , or 0, which would place the first rendering of the object in the position defined in the template. Subsequent occurrences would be rendered at a 110 pixel offset along the x-axis (to the right).

At runtime three sets of shapes are rendered across the page, as shown in the following figure:



To make an even more visually representative report, these shapes can be superimposed onto a world map. Just use the Order dialog in Microsoft Word to layer the map behind the grouped shapes.

- Microsoft Word 2000 Users: After you add the background map and overlay the shape group, use the Grouping dialog to make the entire composition one group.
- Microsoft Word 2002/3 Users: These versions of Word have an option under Tools > Options, **General** tab to "Automatically generate drawing canvas when inserting autoshapes". Using this option removes the need to do the final grouping of the map and shapes. You can now generate a visually appealing output for the report as seen in the following figure:



## Supported Formatting Features of Microsoft Word

Microsoft Word can simplify formatting output.

In addition to the features already listed, other supported features of Microsoft Word are described in the following sections:

- [General Features of Microsoft Word](#)
- [Align Objects](#)
- [Insert Tables](#)
- [Insert Date Fields](#)
- [Insert Multiple Columns on Pages](#)
- [Insert Backgrounds and Watermarks](#)
- [Microsoft Word Features that Aren't Supported](#)

### General Features of Microsoft Word

The general features of Microsoft Word are large blocks of text, page breaks, page numbering, and hidden text.

- Large blocks of text
- Page breaks

(Not supported for HTML output) To insert a page break, press Ctrl+Enter right before the closing tag of a group. For example if you want the template to start a new page for every Supplier in the Payables Invoice Register:

1. Place the cursor just before the Supplier group's closing `<?end for-each?>` tag.

2. Press Ctrl+Enter to insert a page break.

At runtime each Supplier starts on a new page.

Using this Microsoft Word native feature causes a single blank page to print at the end of the report output. To avoid this single blank page, use Publisher's page break alias.

- Page numbering

Insert page numbers into the final report by using the page numbering methods of the word processor. For example, if you're using Microsoft Word:

1. From the **Insert** menu, select **Page Numbers...**
2. Select the **Position**, **Alignment**, and **Format** as desired.

At runtime the page numbers are displayed as selected.

Note that page numbering isn't supported for HTML output and has limited support in RTF output. After the RTF report is generated, press F9 to reset the page numbers.

- Hidden text

You can format text as hidden in Microsoft Word and the hidden text is maintained in RTF output reports.

## Align Objects

Use the word processor's alignment features to align text, graphics, objects, and tables. Bidirectional languages are handled automatically using the word processor's left/right alignment controls.

Note that Publisher output documents don't support right and left justification for symbol-based languages such as Chinese, Japanese, and Korean.

The RTF output doesn't support center aligning the bulleted list and the numbered list.

## Insert Tables

Insert Microsoft Word tables to enhance your reports.

The following Microsoft Word features are supported in Publisher:

- Nested Tables
- Cell Alignment

You can align any object in the template using the word processor's alignment tools. This alignment is reflected in the final report output.

- Row spanning and column spanning

To span both columns and rows in the template:

1. Select the cells that you want to merge.
2. From the **Table** menu, select **Merge Cells**.
3. Align the data within the merged cell as you would normally.

At runtime the cells appear merged.

- Table Autoformatting

Publisher recognizes the table autoformats available in Microsoft Word.

To autoformat tables:

1. Select the table that you want to format.
2. From the **Table** menu, select **Autoformat**.
3. Select the desired table format.

At runtime, the table is formatted using your selection.

- Cell patterns and colors

To highlight cells or rows of a table with a pattern or color:

1. Select the cell(s) or table.
2. From the **Table** menu, select **Table Properties**.
3. From the **Table** tab, select the **Borders and Shading...** button.
4. Add borders and shading as desired.

- Repeating table headers

Repeating table headers feature isn't supported for RTF output.

If the data is displayed in a table and you expect the table to extend across multiple pages, then you can define the header rows that you want to repeat at the start of each page.

To repeat header rows:

1. Select the row(s) that you want to repeat on each page.
2. From the **Table** menu, select **Heading Rows Repeat**.

- Prevent rows from breaking across pages.

If you want to ensure that data within a row of a table is kept together on a page, you can set this as an option using Microsoft Word's **Table Properties**.

To keep a row's contents together on one page:

1. Select the row(s) that you want to ensure do not break across a page.
2. From the **Table** menu, select **Table Properties**.
3. From the **Row** tab, deselect the check box **Allow row to break across pages**.

- Fixed-width columns

To set the widths of table columns:

1. Select a column and then select **Table > Table Properties**.
2. In the Table Properties dialog, select the **Column** tab.
3. Enable the **Preferred width** checkbox and then enter the width as a **Percent** or in **Inches**.
4. Select the **Next Column** button to set the width of the next column.

Note that the total width of the columns must add up to the total width of the table.

- Text truncation

By default, if the text within a table cell doesn't fit within the cell, then the text is wrapped. To truncate the text instead, use the table properties dialog.

Note that table text truncation is supported for PDF and PPT outputs only.

To truncate the text within a table cell:

1. Place the cursor in the cell in which you want the text truncated.



2. Right-click and select **Table Properties...** from the menu, or navigate to **Table > Table Properties...**
3. From the Table Properties dialog, select the **Cell** tab, then select **Options...**
4. Deselect the **Wrap Text** check box.

When using multibyte characters (for example, simplified Chinese) in tables, ensure that the column widths are large enough to contain the width of the largest character plus the cell's left and right margins to avoid unexpected character display in your final output.

An example of truncation is shown in the following figure.

Wrap Text checked	Wrap Text unchecked
The quick brown fox jumped over the lazy river.	The quick brown fox

## Insert Date Fields

Insert dates using the date feature of the word processor. Note that this date corresponds to the publishing date, not to the request run date.

## Insert Multiple Columns on Pages

Publisher supports Microsoft Word's Columns function to enable you to publish the output in multiple columns on a page. (Note that this isn't supported for HTML output.)

Select **Format**, then **Columns** to display the Columns dialog to define the number of columns for the template.

To generate address labels in a two-column format:

1. Divide the page into two columns using the Columns command.
2. Define the repeatable group in the first column. Note that you define the repeatable group only in the first column, as shown in the following illustration.



Name	CUSTOMER_NAME
Number	CUSTOMER_NUMBER
City	CITY
State	STATE
Zip Code	ZIP_CODE

✓ **Tip**

To prevent the address block from breaking across pages or columns, embed the label block inside a single-celled table. Then specify in the Table Properties that the row shouldn't break across pages.

This template produces the multicolumn output that is shown in the following illustration.

Name	Nuts and Bolts Ltd	Name	Big Co
Number	1220	Number	1221
City	Espoo	City	Helsinki
State	FI	State	FI
Zip Code	0000000000000000	Zip Code	0000000000000000

Name	My Company	Name	Small Co
Number	1220	Number	1221
City	Espoo	City	Helsinki
State	FI	State	FI
Zip Code	0000000000000000	Zip Code	0000000000000000

## Insert Backgrounds and Watermarks

Use Microsoft Word to insert backgrounds and watermarks in templates. You can specify a single, graduated color or an image background for the template to be displayed in the PDF or PPT output.

To add a background to the template, use the Format > Background menu option.

## Add a Background Using Microsoft Word 2000

With the Background support feature in Microsoft Word you can select a color background and fill effects.

From the **Background** pop up menu, you can:

- Select a single color background from the color palette.
- Select **Fill Effects** to open the Fill Effects dialog.

From this dialog, select one of the following supported options:

- **Gradient:** This can be either one or two colors.
- **Texture:** Select one of the textures provided, or load your own.
- **Pattern:** Select a pattern and background/foreground colors.
- **Picture:** Load a picture to use as a background image.

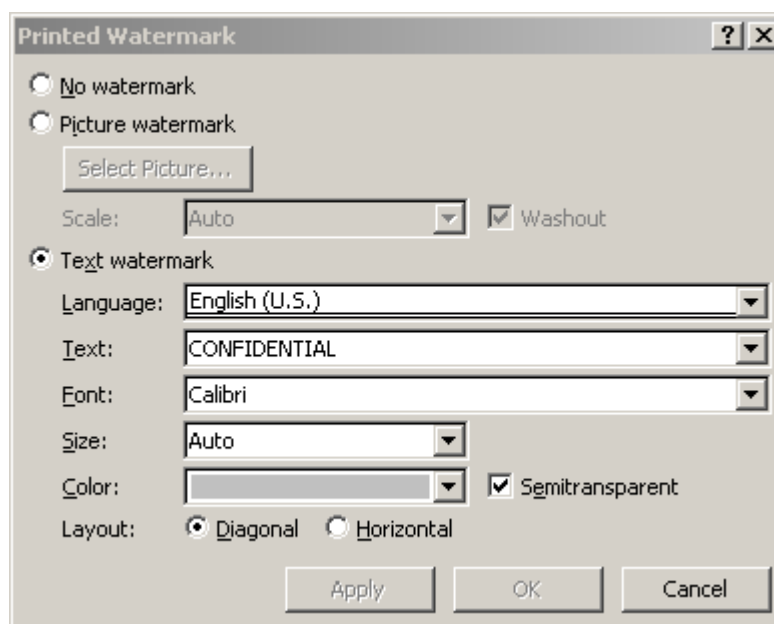
## Add a Text or Image Watermark Using Microsoft Word 2002 or later

These versions of Microsoft Word allow you to add either a text or image watermark. Note that the steps you take to add a watermark depend on which version of Microsoft Word you are using.

You can add the following types of watermarks to documents:

- Picture Watermark - Load an image and define how it should be scaled on the document.
- Text Watermark - Use the predefined text options or enter your own, then specify the font, size and how the text should be rendered.

The following figure shows an example of the Printed Watermark dialog completed to display a text watermark in Microsoft Word 2010:



## Microsoft Word Features that Aren't Supported

Don't use soft returns in your RTF template to achieve specific text placement. Instead use hard carriage returns.

A soft return may have unexpected results in your generated output.

## Template Features

Templates include several features that enhance their formatting and layout.

The template features are described in the following topics:

- [Insert Page Breaks](#)
- [Insert an Initial Page Number](#)
- [Specify Last Page Only Content](#)

- [End on Even or Odd Pages](#)
- [Insert Blank Page](#)
- [Insert Hyperlinks](#)
- [Include a Table of Contents](#)
- [Generate Bookmarks in PDF Output](#)
- [Insert Check Boxes](#)
- [Insert Drop-Down Lists](#)
- [Repeat Row Headers After Page Break](#)

## Insert Page Breaks

You can create a page break in a few ways. Page breaks are supported for PDF, RTF, and PPT output. Page breaks aren't supported for HTML output.

To create a page break after the occurrence of a specific element use the "split-by-page-break" alias. This causes the report output to insert a hard page break between every instance of a specific element.

To insert a page break between each occurrence of a group, insert the "split-by-page-break" form field within the group immediately before the `<?end-for-each?>` tag that closes the group. In the Help Text of this form field enter the syntax:

```
<?split-by-page-break:?>
```

For the following XML, assume you want to create a page break for each new supplier:

```
<SUPPLIER>
<NAME>My Supplier</NAME>
<INVOICES>
<INVOICE>
<INVNUM>10001-1</INVNUM>
<INVDAT>1-Jan-2005</INVDAT>
<INVAMT>100</INVOICEAMT>
</INVOICE>
<INVOICE>
<INVNUM>10001-2</INVNUM>
<INVDAT>10-Jan-2005</INVDAT>
<INVAMT>200</INVOICEAMT>
</INVOICE>
</INVOICES>
</SUPPLIER>
<SUPPLIER>
<NAME>My Second Supplier</NAME>
<INVOICES>
<INVOICE>
<INVNUM>10001-1</INVNUM>
<INVDAT>11-Jan-2005</INVDAT>
<INVAMT>150</INVOICEAMT>
</INVOICE>
...
```

In the template sample shown in the following illustration, the field called PageBreak contains the split-by-page-break syntax:

FE

Supplier: Supplier 1

Invoice Number	Invoice Date	Amount	Running Total
FE10001-1	1-Jan-2005	100.00	100.00EFE

PageBreak EFE

Place the PageBreak field with the `<?split-by-page-break:?>` syntax immediately before the `<?end for-each?>` field. The PageBreak field sits inside the end of the SUPPLIER loop. This ensures that a page break is inserted before the occurrence of each new supplier. This method avoids the ejection of an extra page at the end of the group when using the native Microsoft Word page break after the group.

An Excel output generated using a direct FO file created by analytics or by using an RTF template can have page breaks (`break-before="page"`) in the rows of nested tables. This enables you to export an analysis report with sections to an Excel file. For example, in a dashboard page with sections, if you have set the **Insert Page Break** section property to **Outermost Column**, when you export the dashboard page to an Excel file, the Excel file stores information of each section in separate tab.

## Insert an Initial Page Number

Some reports require that the initial page number be set at a specified number. For example, monthly reports may be required to continue numbering from month to month. You can set the initial page number for the PDF and PPT output, but not for the HTML or RTF output.

Use the following syntax in the template to set the initial page number:

```
<?initial-page-number:pagenumber?>
```

where *pagenumber* is the XML element or parameter that holds the numeric value.

Also, you can continue the page number from a previous section. The default behavior of a new section in a document is to reset the page numbering. However, if the report requires that the page numbering continue into the next section, use the following command:

```
<?initial-page-number:'auto'?>
```

This command allows the continuation of the page numbering from the previous section.

### Example 1 - Set page number from XML data element

If the XML data contains an element to carry the initial page number, for example:

```
<REPORT>
  <PAGESTART>200</PAGESTART>
  ....
</REPORT>
```

Enter the following in the template:

```
<?initial-page-number:PAGESTART?>
```

The initial page number is the value of the PAGESTART element, which in this case is 200.

### Example 2 - Set page number by passing a parameter value

If you define a parameter called PAGESTART, then you can pass the initial value by calling the parameter.

Enter the following in the template:

```
<?initial-page-number:$PAGESTART?>
```

You must first declare the parameter in the template. See [Set Parameters](#).

## Specify Last Page Only Content

Use the Microsoft Word functionality to specify a different page layout for the first page, odd pages, and even pages. This feature is supported only for the PDF and PPT output.

To implement these options, simply select **Page Setup** from the **File** menu, then select the **Layout** tab.

However, Microsoft Word doesn't provide settings for a different last page only. This is useful for documents such as checks, invoices, or purchase orders on which you may want the content such as the check or the summary in a specific place only on the last page.

To specify last page only content:

1. Create a section break in the template to ensure the content of the final page is separated from the rest of the report.
2. Insert the following syntax on the final page:

```
<?start@last-page:body?>
```

```
<?end body?>
```

Any content on the page that occurs above or below these two tags is displayed only on the last page of the report. Also, note that because this command explicitly specifies the content of the final page, any desired headers or footers previously defined for the report must be reinserted on the last page.

This example uses the last page only feature for a report that generates an invoice listing with a summary to appear at the bottom of the last page.

Assume the following XML:

```
<?xml version="1.0" encoding="WINDOWS-1252"?>
<INVOICELIST>
  <VENDOR>
    <VENDOR_NAME>Nuts and Bolts Limited</VENDOR_NAME>
    <ADDRESS>1 El Camino Real, Redwood City, CA 94065</ADDRESS>
  </VENDOR>
  <INVOICE>
    <INV_TYPE>Standard</INV_TYPE>
    <INVOICE_NUM>981110</INVOICE_NUM>
    <INVOICE_DATE>10-NOV-04</INVOICE_DATE>
    <INVOICE_CURRENCY_CODE>EUR</INVOICE_CURRENCY_CODE>
    <ENT_AMT>122</ENT_AMT>
    <ACCTD_AMT>122</ACCTD_AMT>
    <VAT_CODE>VAT22%</VAT_CODE>
  </INVOICE>
</INVOICELIST>
```

```

<INVOICE>
<INV_TYPE>Standard</INV_TYPE>
<INVOICE_NUM>100000</INVOICE_NUM>
<INVOICE_DATE>28-MAY-04</INVOICE_DATE>
<INVOICE_CURRENCY_CODE>FIM</INVOICE_CURRENCY_CODE>
<ENT_AMT>122</ENT_AMT>
<ACCTD_AMT>20.33</ACCTD_AMT>
<VAT_CODE>VAT22%</VAT_CODE>
</INVOICE>
</VENDOR>
<VENDOR>
...
<INVOICE>
...
</INVOICE>
</VENDOR>
<SUMMARY>
<SUM_ENT_AMT>61435</SUM_ENT_AMT>
<SUM_ACCTD_AMT>58264.68</SUM_ACCTD_AMT>
<TAX_CODE>EU22%</TAX_CODE>
</SUMMARY>
</INVOICELIST>

```

The report should show each VENDOR and their INVOICE data with a SUMMARY section that appears only on the last page, placed at the bottom of the page. The template for this is shown in this figure.

F

Vendor: VENDOR\_NAME

Address: ADDRESS

Invoice Type	Invoice Num	Invoice Date	Invoice Currency	Entered Amount	Accounted Amount
F Invoice	120000	01-Jan-2006	USD	100	100 E

E

&lt;&lt;insert section break&gt;

Insert a Microsoft Word section break (type: next page) on the first page of the template. For the final page, insert new line characters to position the summary table at the bottom of the page. The summary table is shown in the following illustration.

Last Page Placeholder

### Tax Summary

Tax Code	Entered Amount	Accounted Amount
F VAT 18.5	100	100E

In this example:

- The F and E components contain the for-each grouping statements.
- The grayed report fields are placeholders for the XML elements.
- The "Last Page Placeholder" field contains the syntax:

```
<?start@last-page:body?> <?end body?>
```

to declare the last page layout. Any content above or below this statement is displayed on the last page only. The content above the statement is regarded as the header and the content below the statement is regarded as the footer.

If the reports contains headers and footers that you want to carry over onto the last page, you must reinsert them on the last page.

You must insert a section break (type: next page) into the document to specify the last page layout. This example is available in the samples folder of the Template Builder for Word installation.

Because the default behavior of a new section in a document is to reset the page numbering the page number on the last page is reset. To continue the page numbering from the previous section, use the following command:

```
<?initial-page-number:'auto'?>
```

This command allows the continuation of the page numbering from the previous section.

If the report is only one page in length, the first page layout is used. If the report requires that a single page report should default to the last page layout (such as in a check printing implementation), then you can use the following alternate syntax for the "Last Page Placeholder" on the last page:

```
<?start@last-page-first:body?> <?end body?>
```

Substituting this syntax results in the last page layout for reports that are only one page long.



## End on Even or Odd Pages

If the report has different odd and even page layouts, then you might want to force the report to end specifically on an odd or even page by following these steps. This feature is supported for the PDF and PDF output, but not for the RTF or HTML output.

For example, you may include the terms and conditions of a purchase order in the footer of the report using the different odd/even footer functionality and you want to ensure that the terms and conditions are printed on the final page.

Or, you may have binding requirements to have the report end on an even page, without specific layout.

To end on an even page with layout:

- Insert the following syntax in a form field in the template:

```
<?section:force-page-count;'end-on-even-layout'?>
```

To end on an odd page layout:

- Insert the following syntax in a form field in the template:

```
<?section:force-page-count;'end-on-odd-layout'?>
```

If you do not have layout requirements for the final page, but would like a blank page ejected to force the page count to the preferred odd or even, then use the following syntax:

```
<?section:force-page-count;'end-on-even'?>
```

or

```
<?section:force-page-count;'end-on-odd'?>
```

## Insert Blank Page

You can insert blank pages and skip page numbers in the first page, even pages, or odd pages of the report.

The `fo:page-sequence` object is used as a container for page output elements. The `xdofo:blank-on` attribute of `fo:page-sequence` can specify whether to:

- Leave the first page, even pages, or odd pages blank.
- Skip the page numbers in the first page, even pages, or odd pages.

If you specify to skip the page count, the page number counter isn't displayed when the page renders. The internal page number counter increments irrespective of the setting.

Attribute Name	Values	Default
xdofo:blank-on	<ul style="list-style-type: none"> <li>• none</li> <li>• even</li> <li>• odd</li> <li>• first</li> <li>• even-skip-page-count</li> <li>• odd-skip-page-count</li> <li>• first-skip-page-count</li> </ul>	none

The tags for RTF Template are:

```
<?section:xdofo:blank-on;'even'?>
<?section:xdofo:blank-on;'odd'?>
<?section:xdofo:blank-on;'first'?>
<?section:xdofo:blank-on;'even-skip-page-count'?>
<?section:xdofo:blank-on;'odd-skip-page-count'?>
<?section:xdofo:blank-on;'first-skip-page-count'?>
```

### Examples

To leave the odd pages blank in a report, specify the following code in a form field at the beginning of the template:

```
<?section:xdofo:blank-on;'odd'?>
```

To skip the page count on the even pages of an order report, specify the following code in a form field at the beginning of the template:

```
<?section:xdofo:blank-on;'even-skip-page-count'?>
```

## Insert Hyperlinks

You can add hyperlinks for the PDF, RTF, HTML, PPT, and Excel output.

The hyperlinks can be fixed or dynamic and can link to either internal or external destinations. Hyperlinks can also be added to shapes.

- To insert static hyperlinks to either text or a shape, use the word processor's insert hyperlink feature.

To insert a static hyperlink to a text or a shape:

1. Select the text or shape.
  2. Use the right-mouse menu to select **Hyperlink**; or, select **Hyperlink** from the **Insert** menu.
  3. Enter the URL using any of the methods provided on the Insert Hyperlink dialog box.
- If the input XML data includes an element that contains a hyperlink or part of one, then you can create dynamic hyperlinks at runtime. In the **Type the file or Web page name** field of the Insert Hyperlink dialog, enter the following syntax:

```
{URL_LINK}
```

where *URL\_LINK* is the incoming data element name.

If you have a fixed URL that you want to add elements from the XML data file to construct the URL, enter the following syntax:

`http://www.example.com?product={PRODUCT_NAME}`

where *PRODUCT\_NAME* is the incoming data element name.

In both these cases, at runtime the dynamic URL is constructed.

- You can also pass parameters at runtime to construct a dynamic URL.

Enter the parameter and element names surrounded by braces to build up the URL as follows:

`{ $SERVER_URL } { $REPORT } /cstid={CUSTOMER_ID}`

where *SERVER\_URL* and *REPORT* are parameters passed to the template at runtime (note the \$ sign) and *CUSTOMER\_ID* is an XML data element. This link may render as:

`http://myserver.domain:8888/CustomerReport/cstid=1234`

To add the target attribute to a URL, add the following to the URL string:

`??target=_target_value`

For example:

`http://www.example.com??target=_top`

Values for the target attribute are:

- `_top`
- `_blank`
- `_self`
- `_parent`
- *framename*

You can pass in the value of target dynamically, using the following syntax:

`http://www.example.com/index.html??target={ $myTarget }`

where *myTarget* is the name of the parameter that holds the value.

## Insert Internal Links

Internal links point to a section within a document.

Insert internal links into the template using Microsoft Word's Bookmark feature.

1. Position the cursor in the desired destination in the document.
2. From the **Insert** menu, select **Bookmark**.
3. In the Bookmark dialog, enter a name for this bookmark, and select **Add**.
4. Select the text or shape in the document that you want to link back to the Bookmark target.
5. Use the right-mouse menu to select **Hyperlink**; or select **Hyperlink** from the **Insert** menu.
6. On the Insert Hyperlink dialog, select **Bookmark**.
7. Select the bookmark that you created from the list.

At runtime, the link is maintained in the generated report.

## Include a Table of Contents

Follow the word processor's procedures for inserting a table of contents.

Publisher supports the Table of contents feature for PDF and PPT output. RTF support is limited: After report generation, the user must press F9 to reset the page numbers.

Publisher also provides the ability to create dynamic section headings in the document from the XML data. You can then incorporate these into a table of contents.

Perform these steps to create dynamic headings:

1. Enter a placeholder for the heading in the body of the document, and format it as a Heading, using the word processor's style feature. You cannot use form fields for this functionality.

For example, you want the report to display a heading for each company reported. The XML data element tag name is <COMPANY\_NAME>. In the template, enter <?COMPANY\_NAME?> where you want the heading to appear. Now format the text as a Heading.

2. Create a table of contents using the word processor's table of contents feature.

At run time, the TOC placeholders and heading text are substituted.

## Generate Bookmarks in PDF Output

If you define a table of contents in the RTF template, then you can use the table of contents definition to generate links in the **Bookmarks** tab in the navigation pane of the output PDF.

The bookmarks can be either static or dynamically generated.

The support for bookmark in RTF templates is limited to a single-point bookmark to allow link (Goto) functionality within the document. Arrays in bookmarks aren't supported.

- To create links for a static table of contents:

Enter the syntax:

<?copy-to-bookmark:?>

directly above the table of contents and

<?end copy-to-bookmark:?>

directly below the table of contents.

- To create links for a dynamic table of contents:

Enter the syntax:

<?convert-to-bookmark:?>

directly above the table of contents and

<?end convert-to-bookmark:?>

directly below the table of contents.

To control the initial state of the bookmark when the PDF file is opened, use the following command:

```
<?collapse-bookmark:state;level?>
```

where

the *state* can have the following values:

- hide - Collapses the table of contents entries
- show - Expands the table of contents entries

and

*level* sets the table of contents collapse level. For example:1 collapses the first level of entries in the table of contents; 2 collapses the first and second level entries.

Use this command with `<?copy-to-bookmark:?>` and `<?convert-to-bookmark:?>` as shown in the following examples:

- To create a static table of contents that hides level 1 and level 2 of the table of contents entries, enter the following:

```
<?copy-to-bookmark:?>  
<?collapse-bookmark:hide;2?>
```

directly above the table of contents and

```
<?end copy-to-bookmark:?>
```

directly below the table of contents.

- To create links for a dynamic table of contents that shows levels 1 and 2 of the table of contents expanded, enter the following:

```
<?convert-to-bookmark:>  
<?collapse-bookmark:show;2?>
```

directly above the table of contents and

```
<?end convert-to-bookmark:?>
```

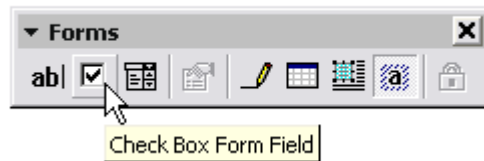
directly below the table of contents.

## Insert Check Boxes

You can include a check box in the report template that you can define to display as checked or unchecked based on a value from the incoming data.

Check boxes are supported in the PDF output only.

1. Position the cursor in the report template where you want the check box to display, and select the **Check Box Form Field** from the **Forms** tool bar, as shown in the following figure:

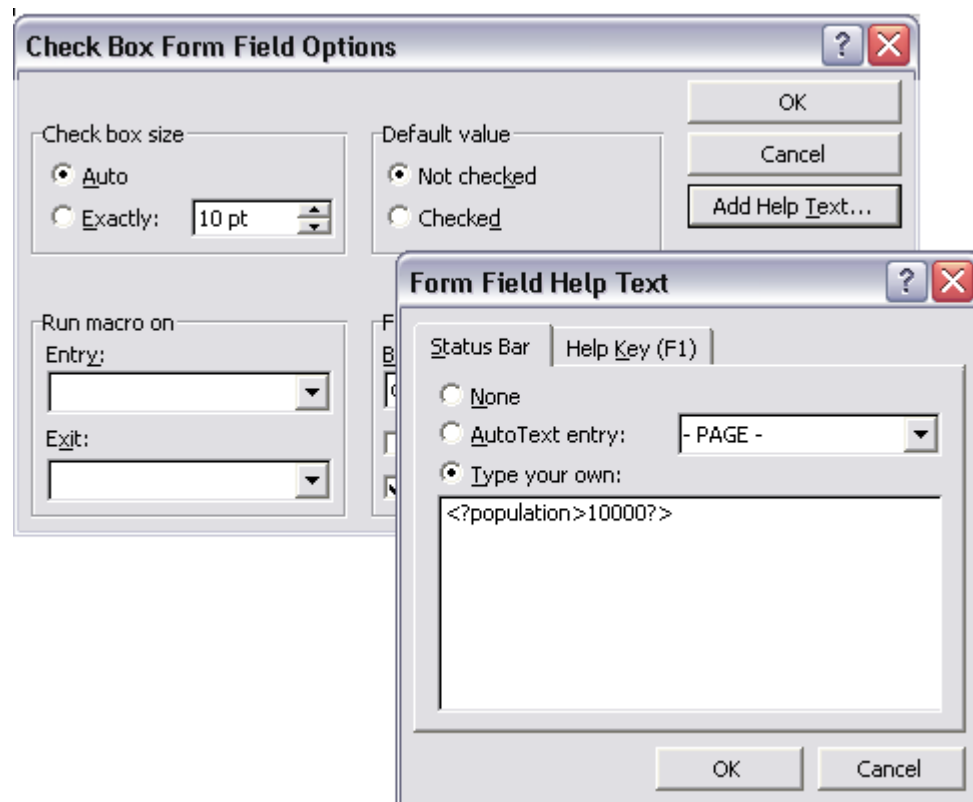


2. Right-click the field to open the Check Box Form Field Options dialog.
3. Specify the **Default value** as either Checked or Not Checked.
4. In the Form Field Help Text dialog, enter the criteria for how the box should behave. This must be a boolean expression (that is, one that returns a true or false result).

For example, suppose the XML data contains an element called `<population>`. You want the check box to appear checked if the value of `<population>` is greater than 10,000. Enter the following in the help text field:

```
<?population>10000?>
```

The help text coding is shown in the following figure:



Note that you don't have to construct an if statement. The expression is treated as an if statement.

## Insert Drop-Down Lists

You can use the drop-down form field to create a cross-reference in the template from the XML data to some other value that you define in the drop-down form field.

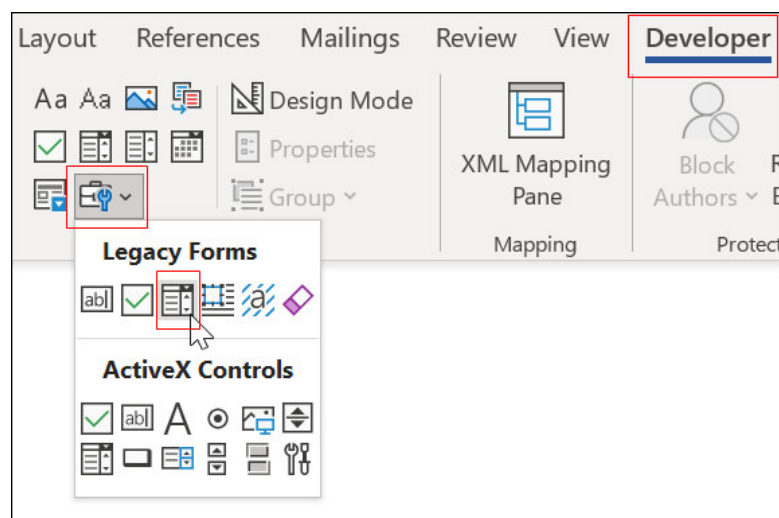
For example, suppose you've the following XML:

```
<countries>
<country>
  <name>Chad</name>
  <population>7360000</population>
  <continentIndex>5</continentIndex>
</country>
<country>
  <name>China</name>
  <population>1265530000</population>
  <continentIndex>1</continentIndex>
</country>
<country>
  <name>Chile</name>
  <population>14677000</population>
  <continentIndex>3</continentIndex>
</country>
...
</countries>
```

Notice that each <country> entry has a <continentindex> entry, which is a numeric value to represent the continent. Using the drop-down form field, you can create an index in the template that cross-references the <continentindex> value to the actual continent name. You can then display the name in the published report.

To create the index for the continent example:

1. Position the cursor in the template where you want the value from the drop-down list to display, in the Developer tab, click **Legacy Tools**, and then select the **Drop-Down Form Field** from the **Legacy Forms** tool bar, as shown in the figure:

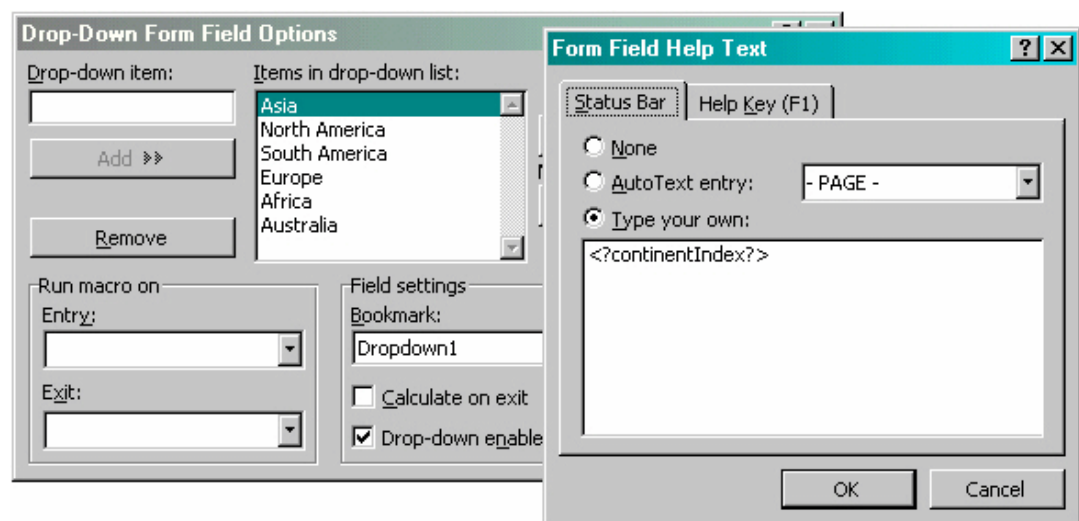


2. Right-click the field to display the Drop-Down Form Field Options dialog.
3. Add each value to the **Drop-down item** field and the click **Add** to add it to the **Items in drop-down list** group. The values are indexed starting from one for the first, and so on. For example, the list of continents is stored as:
  - 1 - Asia
  - 2 - North America
  - 2 - South America
  - 4 - Europe
  - 5 - Africa
  - 6 - Australia
4. Now use the Help Text box to enter the XML element name that holds the index for the drop-down field values.

For this example, enter

```
<?continentIndex?>
```

The following figure shows the Drop-Down Form Field Options dialogs for this example:



Using the check box and drop-down list features, you can create a report to display population data with check boxes to demonstrate figures that reach a certain limit. An example illustrating a report of population data with check boxes is shown in the following figure:

Country	Population	more than 10M?	Continent
Chad	7,360,000	<input type="checkbox"/>	Africa
China	1,265,530,000	<input checked="" type="checkbox"/>	Asia
Chile	14,677,000	<input checked="" type="checkbox"/>	South America
Sweden	8,887,000	<input type="checkbox"/>	Europe
United States	270,312,000	<input checked="" type="checkbox"/>	North America
New Zealand	3,625,000	<input type="checkbox"/>	Australia



The template to create this report is shown in the below figure and the fields have the values shown in the table below.

Country	Population	more than 10M?	Continent
FE China	1,000,000	<input type="checkbox"/>	Asia EFE

Description of the fields for drop-down list:

- FE - Form field entry: `<?for-each:country?>` - Begins the country repeating group.
- China - Form field entry: `<?name?>` - Placeholder for the name element.
- 1,000,000 - Form field entry: `<?population?>` - Placeholder for the population element.
- (check box) - Form field entry: `<?population>1000000?>` - Establishes the condition for the check box. If the value for the population element is greater than 1,000,000, the check box is displayed as checked.
- Asia - Form field entry: `<?continentIndex?>` - The drop-down form field for the continentIndex element. See the preceding description for its contents. At runtime, the value of the XML element is replaced with the value it's cross-referenced to in the drop-down form field.
- EFE - Form field entry: `<?end for-each?>` - Ends the country group.

## Repeat Row Headers After Page Break

If your report includes a row header that spans multiple rows, for example in a group-left construction, you can specify that the content in the initial cell repeats on the next page.

See the example shown in the following table.

Date	Invoice	Amount
02-DEC-12	234	53.35
04-DEC-12	10020402	146776.07
	10020403	172482.45
	10020404	147740.25
	10020405	71577.42
	10020406	89344.81
	10020407	223563.03
	10020408	176353.55
05-DEC-12	10020487	112902.54
06-DEC-12	502444	19125
	502445	12375

In the preceding example, if the report breaks across the 04-Dec-12 group, you would most likely prefer that the cell contents "04-Dec-12" repeat on the next page. To specify that the cell contents repeat, insert the following code in a form field in the table data cell that is to repeat:

```
<?attribute@block:xdof:rowspancell-repeat-nextpage;'true'?>
```

This feature is only useful when number-rows-spanned for the table-cell is greater than one.

# Use Conditional Formatting

Conditional formatting occurs when a formatting element appears only when a certain condition is met.

For information about using the Template Builder to insert conditional regions and conditional formatting, see [Insert and Edit Conditional Regions](#) and [Insert Conditional Formatting](#).

You can use simple "if" statements as well as more complex "choose" expressions.

The conditional formatting that you specify can be XSL or XSL:FO code, or you can specify actual RTF objects such as a table or data. For example, you can specify that if reported numbers reach a certain threshold, they're displayed shaded in red. Or, you can use this feature to hide table columns or rows depending on the incoming XML data.

This section covers the following topics of conditional formatting:

- [Use If Statements](#)
- [Use If Statements in Boilerplate Text](#)
- [Use If-Then-Else Statements](#)
- [Insert Choose Statements](#)
- [Format Columns](#)
- [Format Rows](#)
- [Highlight Cells](#)

## Use If Statements

Use an if statement to define a simple condition; for example, if a data field is a specific value.

To use an if statement:

1. Insert the following syntax to designate the beginning of the conditional area.

```
<?if:condition?>
```

2. Insert the following syntax at the end of the conditional area: `<?end if?>`.

For example, to set up the Payables Invoice Register to display invoices only when the Supplier name is "Company A", insert the syntax `<?if:VENDOR_NAME='COMPANY A'?>` before the Supplier field on the template.

Enter the `<?end if?>` tag after the invoices table.

This example is displayed in the following illustration. Note that you can insert the syntax in form fields, or directly into the template.

Group: Suppliers	
<?if:VENDOR_NAME='Company A'?>	
Supplier: <b>Supplier 1</b>	
<b>Invoice Num</b>	<b>Invoice Date</b>
Group:Invoices 1234566	1-Jan-2004
<?end if?>	
End:Suppliers	

## Use If Statements in Boilerplate Text

You can use "if" statements to change messages presented to users.

Assume that you want to incorporate an "if" statement into the following free-form text:

The program was (not) successful.

You want the "not" to display only if the value of an XML tag called <SUCCESS> equals "N".

To achieve this requirement, use the Publisher context command to place the if statement into the inline sequence rather than into the block (the default placement).

See [Control the Placement of Instructions Using the Context Commands](#).

For example, if you construct the code as follows:

The program was <?if:SUCCESS='N'?>not<?end if?> successful.

The following undesirable result occurs:

The program was  
not  
successful.

Because Publisher applies the instructions to the block by default. To specify that the if statement should be inserted into the inline sequence, enter the following:

The program was <?if@inlines:SUCCESS='N'?>not<?end if?>  
successful.

This construction results in the following display:

The program was successful.

If SUCCESS doesn't equal 'N';

or

The program was not successful.

If SUCCESS equals 'N'.

If you use @inlines with if syntax, any other if syntax inside the statement must use the context command @inline. If you use @inlines with FOR-EACH syntax any other if or FOR-EACH syntax inside the statement must use the context command @inline.

## Use If-Then-Else Statements

You can use the programming construct "if-then-else".

"if-then-else" is extremely useful when you must test a condition and conditionally show a result. For example:

```
IF X=0 THEN
  Y=2
ELSE
  Y=3
END IF
```

You can also nest these statements as follows:

```
IF X=0 THEN
  Y=2
ELSE
  IF X=1 THEN
    Y=10
  ELSE Y=100
END IF
```

Use the following syntax to construct an if-then-else statement in the RTF template:

```
<?xdofx:if element_condition then result1 else result2 end if?>
```

For example, the following statement tests the AMOUNT element value. If the value is greater than 1000, show the word "Higher"; if it's less than 1000, show the word "Lower"; if it's equal to 1000, show "Equal":

```
<?xdofx:if AMOUNT > 1000 then 'Higher'
else
if AMOUNT < 1000 then 'Lower'
else
'Equal'
end if?>
```

## Insert Choose Statements

Use the choose, when, and otherwise elements to express multiple conditional tests. If certain conditions are met in the incoming XML data, then specific sections of the template are rendered. This is a very powerful feature of the RTF template. In regular XSL programming, if a condition is met in the choose command then further XSL code is executed. In the template, however, you can actually use visual widgets in the conditional flow (in the following example, a table).

Use the following syntax for these elements:

<?choose:?>

<?when:expression?>

<?otherwise?>

## Conditional Formatting Example

This example shows a choose expression in which the display of a row of data depends on the value of the fields EXEMPT\_FLAG and POSTED\_FLAG. When the EXEMPT\_FLAG equals "^", the row of data renders light gray. When POSTED\_FLAG equals "\*" the row of data renders shaded dark gray. Otherwise, the row of data renders with no shading.

In the following figure, the form field default text is displayed. The form field help text entries are shown in the following table:

Column Legend:		<div><div></div>'Not Posted'</div> <div><div></div>'Reduces Available Exemption Limit'</div>																																																																																			
e	<table><tr><th>Tax Code</th><th>Taxable Recoverable</th><th>Taxable Non-Recoverable</th><th>Recoverable Tax</th><th>Tax Non-Recoverable</th><th>Total</th></tr><tr><td colspan="6">&lt;Grp:VAT</td></tr><tr><td colspan="6">&lt;Choose</td></tr><tr><td colspan="6">&lt;?when EXEMPT_FLAG='^'</td></tr><tr><td>VAT 15%</td><td>1000</td><td>1000</td><td>1000</td><td>1000</td><td>1000</td></tr><tr><td colspan="6">End When&gt;</td></tr><tr><td colspan="6">&lt;?when POSTED_FLAG='*'</td></tr><tr><td>VAT 15%</td><td>1000</td><td>1000</td><td>1000</td><td>1000</td><td>1000</td></tr><tr><td colspan="6">End When&gt;</td></tr><tr><td colspan="6">Otherwise</td></tr><tr><td>VAT 15%</td><td>1000</td><td>1000</td><td>1000</td><td>1000</td><td>1000</td></tr><tr><td colspan="6">End Otherwise&gt;</td></tr><tr><td colspan="6">End Choose&gt;</td></tr><tr><td colspan="6">End VAT&gt;</td></tr></table>	Tax Code	Taxable Recoverable	Taxable Non-Recoverable	Recoverable Tax	Tax Non-Recoverable	Total	<Grp:VAT						<Choose						<?when EXEMPT_FLAG='^'						VAT 15%	1000	1000	1000	1000	1000	End When>						<?when POSTED_FLAG='*'						VAT 15%	1000	1000	1000	1000	1000	End When>						Otherwise						VAT 15%	1000	1000	1000	1000	1000	End Otherwise>						End Choose>						End VAT>					
Tax Code	Taxable Recoverable	Taxable Non-Recoverable	Recoverable Tax	Tax Non-Recoverable	Total																																																																																
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End Choose>																																																																																					
End VAT>																																																																																					

Default Text Entry in Example Form Field	Help Text Entry in Form Field
<Grp:VAT	<?for-each:G_VAT?> starts the G_VAT group
<Choose	<?choose:?> opens the choose statement

Default Text Entry in Example Form Field	Help Text Entry in Form Field
<When EXEMPT_FLAG='^'	<?when: EXEMPT_FLAG='^'?> tests the EXEMPT_FLAG element, if true, use the first table shown
End When>	<?end when?> ends the EXEMPT_FLAG test
<When POSTED_FLAG='**'	<?when:POSTED_FLAG='**'?> tests the POSTED_FLAG element, if true, use the table following
End When>	<?end when?> ends the POSTED_FLAG test
Otherwise	<?otherwise:?> If none of above are true then use the following table
End Otherwise>	<?end otherwise?> ends the otherwise statement
End Choose>	<?end choose?> ends the choose statement
End Vat>	<?end for-each?> ends the G_VAT group

## Format Columns

You can conditionally show and hide columns of data in the document output. This example demonstrates how to set up a table so that a column is only displayed based on the value of an element attribute.

This example shows a report of a price list, represented by the following XML:

```
<items type="PUBLIC"> <! - can be marked 'PRIVATE' - >
<item>
  <name>Plasma TV</name>
  <quantity>10</quantity>
  <price>4000</price>
</item>
<item>
  <name>DVD Player</name>
  <quantity>3</quantity>
  <price>300</price>
</item>
<item>
  <name>VCR</name>
  <quantity>20</quantity>
  <price>200</price>
</item>
<item>
  <name>Receiver</name>
  <quantity>22</quantity>
  <price>350</price>
</item>
</items>
```

Notice the "type" attribute associated with the items element. In this XML it's marked as "PUBLIC" meaning the list is a public list rather than a PRIVATE list. For the public version of the list, the quantity column shouldn't be shown in the output, but you want to develop only one template for both versions based on the list type.

The following figure contains a simple template that conditionally shows or hides the quantity column.

Name	IFQuantityend-if	Price
grp:ItemPlasma TV	IF 20 end-if	1,000.00end grp

The following table shows the entries made in the template that is shown in the above figure:

Default Text	Form Field Entry	Description
grp:Item	<?for-each:item?>	Holds the opening for-each loop for the item element.
Plasma TV	<?name?>	The placeholder for the name element from the XML file.
IF	<?if@column:/items/@type="PRIVATE"?>	The opening of the if statement to test for the attribute value PRIVATE in the column header. Note that this syntax uses an XPath expression to navigate back to the items level of the XML to test the attribute. For more information about using XPath in templates, see <a href="#">Use XPath Commands</a> .
Quantity	N/A	Boilerplate heading
end-if	<?end if?>	Ends the if statement.
IF	<?if@cell:/items/@type="PRIVATE"?>	The opening of the if statement to test for the attribute value PRIVATE in the column data.
20	<?quantity?>	The placeholder for the quantity element.
end-if	<?end if?>	Ends the if statement.
1,000.00	<?price?>	The placeholder for the price element.
end grp	<?end for-each?>	Closing tag of the for-each loop.

The conditional column syntax is the "if" statement syntax with the addition of the @column clause. It's the @column clause that instructs to hide or show the column based on the outcome of the if statement.

If you did not include the @column the data would not display in the report as a result of the if statement, but the column still would because you had drawn it in the template.

The @column clause is an example of a context command. For more information, see [Control the Placement of Instructions Using the Context Commands](#).

The example renders the output that is shown in the following figure:

Name	Price
Plasma TV	4,000.00
DVD Player	300.00
VCR	200.00
Receiver	350.00

If the same XML data contained the type attribute set to PRIVATE, then the output that is shown in the below figure is rendered from the same template.

Name	Quantity	Price
Plasma TV	10	4,000.00
DVD Player	3	300.00
VCR	20	200.00
Receiver	22	350.00

## Format Rows

You can specify formatting conditions as the row-level of a table.

Examples of row-level formatting are:

- Highlighting a row when the data meets a certain threshold.
- Alternating background colors of rows to ease readability of reports.
- Showing only rows that meet a specific condition.

### Conditionally Display a Row

To display only rows that meet a certain condition, insert the `<?if:condition?>` `<?end if?>` tags at the beginning and end of the row, within the for-each tags for the group. These tags are demonstrated in the sample template that is shown in the following figure:

Industry	Year	Month	Sales
<code>for-each SALE if big INDUSTRY</code>	<code>YEAR</code>	<code>MONTH</code>	<code>SALES end if end SALE</code>

The following table describes the fields from the template in the above figure:

Default Text Entry	Form Field Help Text	Description
for-each SALE	<code>&lt;?for-each:SALE?&gt;</code>	Opens the for-each loop to repeat the data belonging to the SALE group.
if big	<code>&lt;?if:SALES&gt;5000?&gt;</code>	If statement to display the row only if the element SALES has a value greater than 5000.
INDUSTRY	<code>&lt;?INDUSTRY?&gt;</code>	Data field
YEAR	<code>&lt;?YEAR?&gt;</code>	Data field
MONTH	<code>&lt;?MONTH?&gt;</code>	Data field
SALES end if	<code>&lt;?end if?&gt;</code>	Closes the if statement.
end SALE	<code>&lt;?end for-each?&gt;</code>	Closes the SALE loop.



## Conditionally Highlight a Row

This example demonstrates how to set a background color on every other row. The template to create this effect is shown in the following figure:

Industry	Year	Month	Sales
for-each SALE format; INDUSTRY	YEAR	MONTH	SALES end SALE

The following table shows values of the form fields from the template in the above figure:

Default Text Entry	Form Field Help Text	Description
for-each SALE	<?for-each:SALE?>	Defines the opening of the for-each loop for the SALE group.
format;	<?if@row:position() mod 2=0?> <xsl:attribute name="background-color" xdofo:ctx="incontext">lightgray</xsl:attribute><?end if?>	For each alternate row, the background color attribute is set to gray for the row.
INDUSTRY	<?INDUSTRY?>	Data field
YEAR	<?YEAR?>	Data field
MONTH	<?MONTH?>	Data field
SALES	<?SALES?>	Data field
end SALE	<?end for-each?>	Closes the SALE for-each loop.

In the above table, note the format; field. It contains an if statement with a "row" context (@row). This sets the context of the if statement to apply to the current row. If the condition is true, then the <xsl:attribute> for the background color of the row is set to light gray. This setting results in the output that is shown in the following figure:

Industry	Year	Month	Sales
Oil	2000	Jan	100,000
Automotive	2000	Jan	200,000
Groceries	2000	Jan	50,000

See [Control the Placement of Instructions Using the Context Commands](#).

## Highlight Cells

This example demonstrates how to conditionally highlight a cell based on a value in the XML file.

This example uses the following XML code:

```
<accounts>
<account>
```

```


<number>1-100-3333</number>
<debit>100</debit>
<credit>300</credit>
</account>
<account>
<number>1-101-3533</number>
<debit>220</debit>
<credit>30</credit>
</account>
<account>
<number>1-130-3343</number>
<debit>240</debit>
<credit>1100</credit>
</account>
<account>
<number>1-153-3033</number>
<debit>3000</debit>
<credit>300</credit>
</account>
</accounts>

```

The template lists the accounts and their credit and debit values. The final report will highlight in red any cell whose value is greater than 1000. The template for this is shown in the following figure:

Account	Debit	Credit
FE:Account 1-232-4444	CH1 100.00	CH2 100.00 EFE

The field definitions for the template are shown in the following table:

Default Text Entry	Form Field Entry	Description
FE:Account	<?for-each:account?>	Opens the for each-loop for the element account.
1-232-4444	<?number?>	The placeholder for the number element from the XML file.
CH1	<?if:debit>1000?><xsl:attribute xdofo:ctx="block" name="background-color">red</xsl:attribute><?end if?>	This field holds the code to highlight the cell red if the debit amount is greater than 1000.
100.00	<?debit?>	The placeholder for the debit element.
<div>  <b>Important</b>            The &lt;?debit?&gt; element must reside in its own field.         </div>		
CH2	<?if:credit>1000?><xsl:attribute xdofo:ctx="block" name="background-color">red</xsl:attribute><?end if?>	This field holds the code to highlight the cell red if the credit amount is greater than 1000.
100.00	<?credit?>	The placeholder for the credit element.

Default Text Entry	Form Field Entry	Description
EFE	<?end for-each?>	Closes the for-each loop.

The code to highlight the debit column as shown in the table is:

```
<?if:debit>1000?>
<xsl:attribute
  xdofo:ctx="block" name="background-color">red
</xsl:attribute>
<?end if?>
```

The "if" statement tests whether the debit value is greater than 1000, and if so the next lines are invoked. Notice that the example embeds native XSL code inside the if statement.

The "attribute" element allows you to modify properties in the XSL.

The xdofo:ctx component allows you to adjust XSL attributes at any level in the template. In this case, the background color attribute is changed to red.

To change the color attribute, you can use either the standard HTML names (for example, red, white, green) or you can use the hexadecimal color definition (for example, #FFFFFF).

This template results in the output that is shown in the following figure:

Account	Debit	Credit
1-100-3333	100.00	300.00
1-101-3533	220.00	30.00
1-130-3343	240.00	1100.00
1-153-3033	3000.00	300.00

## Insert Page-Level Calculations

Learn more about the supported page-level calculations for PDFs and PPTs.

Publisher supports the page-level calculations that are described in the following sections for PDF and PPT outputs only:

- [Display Page Totals](#)
- [Insert Brought Forward and Carried Forward Totals](#)
- [Insert Running Totals](#)

## Display Page Totals

You can display calculated page totals in the report. Because the page isn't created until publishing time, the totaling function must be executed by the formatting engine.

Page totaling is performed in the PDF-formatting layer. Therefore this feature isn't available for other outputs types: HTML, RTF, Excel. This page totaling function works only if the source XML code has raw numeric values. The numbers shouldn't be preformatted.

Because the page total field doesn't exist in the XML input data, you must define a variable to hold the value. When you define the variable, you associate it with the element from the XML file that is to be totaled for the page. Once you define total fields, you can also perform additional functions on the data in those fields.

To declare the variable that is to hold the page total, insert the following syntax immediately following the placeholder for the element being totaled:

```
<?add-page-total:TotalFieldName;'element'?>
```

where

TotalFieldName is the name you assign to the total (to reference later) and

'element' is the XML element field to be totaled.

You can add this syntax to as many fields as you want to total.

Then when you want to display the total field, enter the following syntax:

```
<?show-page-total:TotalFieldName;'Oracle-number-format' number-separators="{$_XDONFSEPARATORS}"?>
```

where

TotalFieldName is the name you assigned to give the page total field above and

Oracle-number-format is the format you want to use to for the display, using the Oracle format mask (for example: 'C9G999D00'). For the list of Oracle format mask symbols, see [Oracle Abstract Format Masks](#).

number-separators="{\$\_XDONFSEPARATORS}" is a required attribute to apply the grouping separator and decimal separator for the format mask you defined.

The following example shows how to set up page total fields in a template to display total credits and debits that have displayed on the page, and then calculate the net of the two fields.

This example uses the following XML code:

```
<balance_sheet>
<transaction>
<debit>100</debit>
<credit>90</credit>
</transaction>
<transaction>
<debit>110</debit>
<credit>80</credit>
</transaction>
...
</balance_sheet>
```

The following figure shows the table to insert in the template to hold the values:

Debit	Credit
FE 100.00	90.00 Net EFE

The following table shows the form field entries made in the template whose table is shown in the previous figure:

Default Text Entry	Form Field Help Text Entry	Description
FE	<?for-each:transaction?>	This field defines the opening "for-each" loop for the transaction group.
100.00	<?debit?><?add-page-total:dt;'debit'?>	This field is the placeholder for the debit element from the XML file. To total this field by page, the page total declaration syntax is added. The variable defined to hold the total for the debit element is dt.
90.00	<?credit?> <?add-page-total:ct;'credit'?>	This field is the placeholder for the credit element from the XML file. To total this field by page, the page total declaration syntax is added. The variable defined to hold the total for the credit element is ct.
Net	<add-page-total:net;'debit - credit'?>	Creates a net page total by subtracting the credit values from the debit values.
EFE	<?end for-each?>	Closes the for-each loop.

Note that on the variable defined as "net" you perform a calculation on the values of the credit and debit elements.

Now that you've declared the page total fields, you can insert a field in the template where you want the page totals to appear. Reference the calculated variables using the names you supplied (in the example, ct and dt). The syntax to display the page totals is as follows:

For example, to display the debit page total, enter the following:

```
<?show-page-total:dt;'C9G990D00';'(C9G990D00)' number-separators="{$_XDONFSEPARATORS}"?>
```

Therefore to complete the example, place the following at the bottom of the template page, or in the footer:

Page Total Debit: <?show-page-total:dt;'C9G990D00';'(C9G990D00)' number-separators="{\$\_XDONFSEPARATORS}"?>

Page Total Credit: <?show-page-total:ct;'C9G990D00';'(C9G990D00)' number-separators="{\$\_XDONFSEPARATORS}"?>

Page Total Balance: <?show-page-total:net;'C9G990D00';'(C9G990D00)' number-separators="{\$\_XDONFSEPARATORS}"?>

The output for this report is shown in the following figure:

		Page 1
	Debit	Credit
	100.00	90.00
	110.00	80.00
	120.00	70.00
	130.00	60.00
	140.00	50.00
	150.00	40.00
		Page Total Debit:750.00 Page Total Credit:390.00 Page Total Balance:360.00

## Insert Brought Forward and Carried Forward Totals

Many reports require that a page total be maintained throughout the report output and be displayed at the beginning and end of each page. These totals are known as "brought forward and carried forward totals".

The totaling for the brought forward and carried forward fields is performed in the PDF-formatting layer. Therefore this feature isn't available for other outputs types such as HTML, RTF, or Excel.

An example of a report with forward totals is displayed in the following figure:

Page 1			Page 2 Brought Forward: 300			Page 3 Brought Forward: 600		
Inv	Date	Amount	Inv	Date	Amount	Inv	Date	Amount
1001	1-Jan-05	100	1004	1-Jan-05	100	1007	1-Jan-05	100
1002	1-Jan-05	100	1005	1-Jan-05	100	1008	1-Jan-05	100
1003	1-Jan-05	100	1006	1-Jan-05	100	1009	1-Jan-05	100
Carried Forward: 300			Carried Forward: 600					

At the end of the first page, the page total for the Amount element is displayed as the **Carried Forward** total. At the top of the second page, this value is displayed as the **Brought Forward** total from the previous page. At the bottom of the second page, the brought forward value plus the total for that page is calculated and displayed as the new **Carried Forward** value, and this continues throughout the report.

This functionality is an extension of the [Display Page Totals](#) feature. The following example walks through the syntax and setup required to display the brought forward and carried forward totals in the published report.

Assume that you've the following XML code:

```
<?xml version="1.0" encoding="WINDOWS-1252"?>
<INVOICES>
  <INVOICE>
    <INVNUM>10001-1</INVNUM>
```

```
<INVDATE>1-Jan-2005</INVDATE>
<INVAMT>100</INVOICEAMT>
</INVOICE>
<INVOICE>
<INVNUM>10001-2</INVNUM>
<INVDATE>10-Jan-2005</INVDATE>
<INVAMT>200</INVOICEAMT>
</INVOICE>
<INVOICE>
<INVNUM>10001-1</INVNUM>
<INVDATE>11-Jan-2005</INVDATE>
<INVAMT>150</INVOICEAMT>
</INVOICE>
...
</INVOICES>
```

The sample template that is shown in the following figure creates the invoice table and declares a placeholder that holds the page total.

Init PTs

Invoice	Date	Amount
FE 132342	10-May-2005	1,000.00 InvAmt EG

End PTs

The following table shows the fields in the template that is shown in the above figure.

Field	Form Field Help Text Entry	Description
Init PTs	<?init-page-total: InvAmt?>	Declares InvAmt as the placeholder that holds the page total.
FE	<?for-each:INVOICE?>	Begins the INVOICE group.
10001-1	<?INVNUM?>	Placeholder for the Invoice Number tag.
1-Jan-2005	<?INVDATE?>	Placeholder for the Invoice Date tag.
100.00	<?INVAMT?>	Placeholder for the Invoice Amount tag.
InvAmt	<?add-page-total:InvAmt;INVAMT?>	Assigns the "InvAmt" page total object to the INVAMT element in the data.
EFE	<?end for-each?>	Closes the INVOICE group.
End PTs	<?end-page-total:InvAmt?>	Closes the "InvAmt" page total.

To display the brought forward total at the top of each page (except the first), use the following syntax:

```
<xdofo:inline-total
  display-condition="exceptfirst"
  name="InvAmt">
  Brought Forward:
<xdofo:show-brought-forward
  name="InvAmt"
```

```
format="99G999G999D00" number-separators="{$_XDONFSEPARATORS}"/>
</xdofo:inline-total>
```

The following list describes the elements that comprise the brought forward syntax:

- **inline-total** - This element has two properties:
  - name - Specifies the name of the variable you declared for the field.
  - display-condition - Sets the display condition. This is an optional property that takes one of the following values:
    - \* first - Contents are displayed only on the first page.
    - \* last - Contents are displayed only on the last page.
    - \* exceptfirst - Contents are displayed on all pages except first.
    - \* exceptlast - Contents are displayed on all pages except last.
    - \* everytime - (Default) Contents are displayed on every page.

In this example, display-condition is set to "exceptfirst" to prevent the value from appearing on the first page where the value would be zero.
- **Brought Forward:** - This string is optional and is displayed as the field name on the report.
- **show-brought-forward** - Shows the value on the page. It has the following properties:
  - name - The name of the field to show. In this case, InvAmt. This property is mandatory.
  - format - The Oracle number format to apply to the value at runtime. This property is optional, but if you want to supply a format mask, you must use the Oracle format mask. See [Oracle Abstract Format Masks](#).
  - number-separators="{\$\_XDONFSEPARATORS}" - This attribute is required to apply the grouping separator and number separator for the format mask you defined.

Insert the brought forward object at the top of the template where you want the brought forward total to display. If you place it in the body of the template, then you can insert the syntax in a form field.

If you want the brought forward total to display in the header, you must insert the full code string into the header because Microsoft Word doesn't support form fields in the header or footer regions. However, you can alternatively use the start body/end body syntax, which allows you to define what the body area of the report is. Publisher recognizes any content above the defined body area as header content, and any content below as the footer. This allows you to use form fields. See [Create Multiple or Complex Headers and Footers](#) for details.

Place the carried forward object at the bottom of the template where you want the total to display. The carried forward object for our example is as follows:

```
<xdofo:inline-total
  display-condition="exceptlast"
  name="InvAmt">
  Carried Forward:
<xdofo:show-carry-forward
  name="InvAmt"
  format="99G999G999D00" number-separators="{$_XDONFSEPARATORS}"/>
</xdofo:inline-total>
```

Note the following differences with the brought-forward object:



- The display-condition is set to exceptlast so that the carried forward total is displayed on every page except the last page.
- The display string is "Carried Forward".
- The show-carry-forward element is used to show the carried forward value. It has the same properties as brought-carried-forward, described above.

You are not limited to a single value in the template, you can create multiple brought forward/ carried forward objects in the template pointing to various numeric elements in the data.

Ensure that you do not include the commands `<?init-page-total:invAmt?>` and `<?end-page-total:InvAmt?>` as shown in the preceding example. The display-condition logic computation depends on these commands to function correctly.

## Insert Running Totals

The variable functionality can be used to add a running total to the invoice listing report.

See [Set Variables](#) for more information. This example assumes the following XML structure:

```
<?xml version="1.0" encoding="WINDOWS-1252"?>
<INVOICES>
  <INVOICE>
    <INVNUM>10001-1</INVNUM>
    <INVDATE>1-Jan-2005</INVDATE>
    <INVAMT>100</INVOICEAMT>
  </INVOICE>
  <INVOICE>
    <INVNUM>10001-2</INVNUM>
    <INVDATE>10-Jan-2005</INVDATE>
    <INVAMT>200</INVOICEAMT>
  </INVOICE>
  <INVOICE>
    <INVNUM>10001-1</INVNUM>
    <INVDATE>11-Jan-2005</INVDATE>
    <INVAMT>150</INVOICEAMT>
  </INVOICE>
</INVOICES>
```

You can use this XML code to create a report that contains running totals as shown in the following illustration.

Invoice Number	Invoice Date	Amount	Running Total
1000-1	1-Jan-2005	100.00	100.00
1000-2	10-Jan-2005	200.00	300.00
1000-3	11-Jan-2005	150.00	450.00

To create the Running Total field, define a variable to track the total and initialize it to 0. The template is shown in the following illustration.

RTotalVar			
Invoice Number	Invoice Date	Amount	Running Total
FE10001-1	1-Jan-2005	100.00	100.00EFE

The values for the form fields in the template that is shown in the previous illustration are described in the next table.

Form Field	Syntax	Description
RtotalVar	<code>&lt;?xdoxslt:set_variable(\$_XDOCTX, 'RTotalVar', 0)?&gt;</code>	Declares the "RTotalVar" variable and initializes it to 0.
FE	<code>&lt;?for-each:INVOICE?&gt;</code>	Starts the Invoice group.
10001-1	<code>&lt;?INVNUM?&gt;</code>	Invoice Number tag
1-Jan-2005	<code>&lt;?INVDAT?&gt;</code>	Invoice Date tag
100.00	<code>&lt;?xdoxslt:set_variable(\$_XDOCTX, 'RTotalVar', xdoxslt:get_variable(\$_XDOCTX, 'RTotalVar') + INVAMT)?&gt; &lt;?xdoxslt:get_variable(\$_XDOCTX, 'RTotalVar')?&gt;</code>	Sets the value of RTotalVar to the current value plus the new Invoice Amount. Retrieves the RTotalVar value for display.
EFE	<code>&lt;?end for-each?&gt;</code>	Ends the INVOICE group.

## Handle Data

These sections describe methods for handling data in templates.

- [Sort Data](#)
- [Check for Null Values](#)
- [Regroup the XML Data](#)

### Sort Data

You can sort a group by any element within the group. Insert the following syntax within the group tags:

```
<?sort:element name; order; data-type?>
```

where

element name is the name of the element you want the group sorted by

order is 'ascending' or 'descending'

data-type is the element data type. Valid values are: 'text' and 'number'.

If the order isn't specified, by default, the sort order is ascending. If the data type isn't specified, the type is assumed to be text.

For example, to sort a dataset by an element named SALARY so that the highest salaries appear first, enter the following:

```
<?sort:SALARY;'descending';'number'?>
```

When you are sorting within a for-each group, enter the sort statement after the for-each statement. For example, to sort the Payables Invoice Register (shown at the beginning of this chapter) by Supplier (VENDOR\_NAME), enter the following:

```
<?for-each:G_VENDOR_NAME?><?sort:VENDOR_NAME?>
```

To sort a group by multiple fields, just enter additional sort statements in the appropriate order. For example, to sort by Supplier and then by Invoice Number, enter the following

```
<?sort:VENDOR_NAME?> <?sort:INVOICE_NUM;'ascending';'number'?>
```

## Check for Null Values

Within the XML data there're three possible scenarios for the value of an element.

Scenarios:

- The element is present in the XML data, and it has a value.
- The element is present in the XML data, but it doesn't have a value.
- The element is missing from the XML data, and therefore there's no value.

In the report layout, you may want to specify a different behavior depending on the presence of the element and its value. The following examples show how to check for each of these conditions using an "if" statement. The syntax can also be used in other conditional formatting constructs.

- To define behavior when the element is present and the value isn't null, use the following:  
`<?if:element_name!='?'> desired behavior <?end if?>`
- To define behavior when the element is present, but is null, use the following:  
`<?if:element_name and element_name=''?'> desired behavior <?end if?>`
- To define behavior when the element is missing, use the following:  
`<?if:not(element_name)?> desired behavior <?end if?>`

## Regroup the XML Data

The RTF template supports the XSL 2.0 for-each-group standard that allows you to regroup XML data into hierarchies that are not present in the original data.

With this feature, the template doesn't have to follow the hierarchy of the source XML file. You are therefore no longer limited by the structure of the data source.

## XML Sample

This XML sample shows a set of data that uses the for-each-group standard.

To demonstrate the for-each-group standard, the following XML data sample of a CD catalog listing is regrouped in a template:

```
<CATALOG>
  <CD>
    <TITLE>Empire Burlesque</TITLE>
    <ARTIST>Bob Dylan</ARTIST>
    <COUNTRY>USA</COUNTRY>
    <COMPANY>Columbia</COMPANY>
```

```

    <PRICE>10.90</PRICE>
    <YEAR>1985</YEAR>
  </CD>
  <CD>
    <TITLE>Hide Your Heart</TITLE>
    <ARTIST>Bonnie Tylor</ARTIST>
    <COUNTRY>UK</COUNTRY>
    <COMPANY>CBS Records</COMPANY>
    <PRICE>9.90</PRICE>
    <YEAR>1988</YEAR>
  </CD>
  <CD>
    <TITLE>Still got the blues</TITLE>
    <ARTIST>Gary More</ARTIST>
    <COUNTRY>UK</COUNTRY>
    <COMPANY>Virgin Records</COMPANY>
    <PRICE>10.20</PRICE>
    <YEAR>1990</YEAR>
  </CD>
  <CD>
    <TITLE>This is US</TITLE>
    <ARTIST>Gary Lee</ARTIST>
    <COUNTRY>UK</COUNTRY>
    <COMPANY>Virgin Records</COMPANY>
    <PRICE>12.20</PRICE>
    <YEAR>1990</YEAR>
  </CD>

```

Using the regrouping syntax, you can create a report of this data that groups the CDs by country and then by year. You are not limited by the data structure presented.

## Regroup Data Syntax

You can regroup data in report using the proper syntax.

Use the following syntax to regroup data:

```
<?for-each-group: BASE-GROUP;GROUPING-ELEMENT?>
```

For example, to regroup the CD listing by COUNTRY, enter the following in the template:

```
<?for-each-group:CD;COUNTRY?>
```

The elements that were at the same hierarchy level as COUNTRY are now children of COUNTRY. You can then refer to the elements of the group to display the values desired.

Use the following syntax to establish nested groupings within the already defined group:

```
<?for-each:current-group(); GROUPING-ELEMENT?>
```

For example, after declaring the CD grouping by COUNTRY, you can then further group by YEAR within COUNTRY as follows:

```
<?for-each:current-group();YEAR?>
```

At run time, Publisher loops through the occurrences of the new groupings, displaying the fields that you defined in the template.

This syntax is a simple XSL for-each-group syntax. If you choose not to use the simplified syntax above, you can use the XSL syntax as shown below. The XSL syntax can only be used within a form field of the template.

```
<xsl:for-each-group
  select=expression
  group-by="string expression"
  group-adjacent="string expression"
  group-starting-with=pattern>
  <!--Content: (xsl:sort*, content-constructor) -->
</xsl:for-each-group>
```

Template Example

You can see some features that can be used to enhance templates in this example.

The following illustration shows a template that displays the CDs by Country, then Year, and lists the details for each CD.

Group by Country

Country:USA

Group by Year

Year:2000

Title	Artist	Price
Group:DetailsMy CD	John Doe	1.00End Group

End Group by Year

End Group by Country

The following table shows the Publisher syntax entries made in the form fields of the template shown in the previous illustration.

Default Text Entry	Form Field Help Text Entry	Description
Group by Country	<?for-each-group:CD;COUNTRY?>	The <?for-each-group:CD;COUNTRY?> tag declares the new group. It regroups the existing CD group by the COUNTRY element.
USA	<?COUNTRY?>	Placeholder to display the data value of the COUNTRY tag.

Default Text Entry	Form Field Help Text Entry	Description
Group by Year	<code>&lt;?for-each-group:current-group();YEAR?&gt;</code>	The <code>&lt;?for-each-group:current-group();YEAR?&gt;</code> tag regroups the current group (that is, COUNTRY), by the YEAR element.
2000	<code>&lt;?YEAR?&gt;</code>	Placeholder to display the data value of the YEAR tag.
Group: Details	<code>&lt;?for-each:current-group()?&gt;</code>	Once the data is grouped by COUNTRY and then by YEAR, the <code>&lt;?for-each:current-group()?&gt;</code> command is used to loop through the elements of the current group (that is, YEAR) and render the data values (TITLE, ARTIST, and PRICE) in the table.
My CD	<code>&lt;?TITLE?&gt;</code>	Placeholder to display the data value of the TITLE tag.
John Doe	<code>&lt;?ARTIST?&gt;</code>	Placeholder to display the data value of the ARTIST tag.
1.00	<code>&lt;?PRICE?&gt;</code>	Placeholder to display the data value of the PRICE tag.
End Group	<code>&lt;?end for-each?&gt;</code>	Closes out the <code>&lt;?for-each:current-group()?&gt;</code> tag.
End Group by Year	<code>&lt;?end for-each-group?&gt;</code>	Closes out the <code>&lt;?for-each-group:current-group();YEAR?&gt;</code> tag.
End Group by Country	<code>&lt;?end for-each-group?&gt;</code>	Closes out the <code>&lt;?for-each-group:CD;COUNTRY?&gt;</code> tag.

This template produces the report that is shown in the next illustration when merged with the XML file.

Country:USA		
Year:1985		
Title	Artist	Price
Empire Burlesque	Bob Dylan	10.90
Country:UK		
Year:1988		
Title	Artist	Price
Hide your heart	Bonnie Tylor	9.90
Year:1990		
Title	Artist	Price
Still got the blues	Gary More	10.20
This is US	Gary Lee	12.20

## Regroup by an Expression

Regrouping by an expression allows you to apply a function or command to a data element, and then group the data by the returned result.

To use this feature, state the expression within the regrouping syntax as follows:

```
<?for-each:BASE-GROUP;GROUPING-EXPRESSION?>
```

To demonstrate this feature, an XML data sample that simply contains average temperatures per month is used as input to a template that calculates the number of months having an average temperature within a certain range.

The following XML code is composed of <temp> groups. Each <temp> group contains a <month> element and a <degree> element, which contains the average temperature for that month:

```
<temps>
  <temp>
    <month>Jan</month>
    <degree>11</degree>
  </temp>
  <temp>
    <month>Feb</month>
    <degree>14</degree>
  </temp>
  <temp>
    <month>Mar</month>
```

```

    <degree>16</degree>
  </temp>
<temp>
  <month>Apr</month>
  <degree>20</degree>
</temp>
<temp>
  <month>May</month>
  <degree>31</degree>
</temp>
<temp>
  <month>Jun</month>
  <degree>34</degree>
</temp>
<temp>
  <month>Jul</month>
  <degree>39</degree>
</temp>
<temp>
  <month>Aug</month>
  <degree>38</degree>
</temp>
<temp>
  <month>Sep</month>
  <degree>24</degree>
</temp>
<temp>
  <month>Oct</month>
  <degree>28</degree>
</temp>
<temp>
  <month>Nov</month>
  <degree>18</degree>
</temp>
<temp>
  <month>Dec</month>
  <degree>8</degree>
</temp>
</temps>

```

You want to display this data in a format showing temperature ranges and a count of the months that have an average temperature to satisfy those ranges, as shown in the following illustration.

### Annual Temperature Summary

Range	Number of Months
0 F to 10 F	1 Month(s)
10 F to 20 F	4 Month(s)
20 F to 30 F	3 Month(s)
30 F to 40 F	4 Month(s)



Using the for-each-group command you can apply an expression to the <degree> element that enables you to group the temperatures by increments of 10 degrees. You can then display a count of the members of each grouping, which is the number of months having an average temperature that falls within each range.

The next illustration shows the template to create the report that is shown in the previous illustration.

Annual Temperature Summary

Range	Number of Months
Group by TmpRng	Months Month(s) End TmpRng
Range	

The next table shows the form field entries made in the template that is shown in the previous illustration.

Default Text Entry	Form Field Help Text Entry
Group by TmpRng	<?for-each-group:temp;floor(degree div 10)?> <?sort:floor(degree div 10)?>
Range	<?concat(floor(degree div 10)*10,' F to ',floor(degree div 10)*10+10,' F')?>
Months	<?count(current-group())?>
End TmpRng	<?end for-each-group?>

Note the following about the form field tags:

- The <?for-each-group:temp;floor(degree div 10)?> is the regrouping tag. It specifies that for the existing <temp> group, the elements are to be regrouped by the expression, floor(degree div 10). The floor function is an XSL function that returns the highest integer that's less than the argument (for example, 1.2 returns 1, 0.8 returns 0).

In this case, it returns the value of the <degree> element, which is then divided by 10. This generates the following values from the XML data: 1, 1, 1, 2, 3, 3, 3, 3, 2, 2, 1, and 0.

These are sorted, so that when processed, the following four groups are created: 0, 1, 2, and 3.

- The <?concat(floor(degree div 10)\*10,' F to ', floor(degree div 10)\*10+10,' F')?> displays the temperature ranges in the row header in increments of 10. The expression concatenates the value of the current group times 10 with the value of the current group times 10 plus 10.

Therefore, for the first group, 0, the row heading displays 0 to (0 +10), or "0 F to 10 F".

- The <?count(current-group())?> uses the count function to count the members of the current group (the number of temperatures that satisfy the range).
- The <?end for-each-group?> tag closes out the grouping.

## Set Variables, Parameters, and Properties

Learn more about setting variables, parameters, and properties.

This section covers the following topics:

- [Set Variables](#)
- [Set Parameters](#)
- [Set Properties](#)

## Set Variables

Updatable variables differ from standard XSL variables `<xsl:variable>` in that they're updatable during the template application to the XML data.

This allows you to create many new features in the templates that require updatable variables.

The variables use a "set and get" approach for assigning, updating, and retrieving values.

Use the following syntax to declare/set a variable value:

```
<?xdoxslt:set_variable($_XDOCTX, 'variable name', value)?>
```

Use the following syntax to retrieve a variable value:

```
<?xdoxslt:get_variable($_XDOCTX, 'variable name')?>
```

For example, you can retrieve a variable value based on a condition:

```
<?if:'column name'=xdoxslt:get_variable($_XDOCTX, 'variable name')?>
```

For example, you can perform calculations:

```
<?xdoxslt:set_variable($_XDOCTX, 'x', xdoxslt:get_variable($_XDOCTX, 'x' + 1)?>
```

This sets the value of variable 'x' to its original value plus 1, much like using "x = x + 1".

The `$_XDOCTX` specifies the global document context for the variables. In a multi-threaded environment there may be many transformations occurring at the same time, therefore the variable must be assigned to a single transformation.

See [Insert Running Totals](#) for an example of the usage of updatable variables.

## Set Parameters

You can pass runtime parameter values into the template.

Parameters can be referenced throughout the template to support many functions. For example, you can filter data in the template, use a value in a conditional formatting block, or pass property values (such as security settings) into the final document.

All name-value parameter pairs are passed to the template. You must register the parameters that you want to utilize in the template using the syntax described below.

To use a parameter in a template:

1. Declare the parameter in the template.

Use the following syntax to declare the parameter:

```
<?param@begin:parameter_name;parameter_value?>
```

where

*parameter\_name* is the name of the parameter

*parameter\_value* is the default value for the parameter (the *parameter\_value* is optional)

param@begin: is a required string to push the parameter declaration to the top of the template at runtime so that it can be referred to globally in the template.

The syntax must be declared in the Help Text field of a form field. The form field can be placed anywhere in the template.

2. Refer to the parameter in the template by prefixing the name with a "\$" character. For example, if you declare the parameter name to be "InvThresh", then reference the value using "\$InvThresh".
3. If you are not using BI Publisher Enterprise, but only the core libraries:

At runtime, pass the parameter to the BI Publisher engine programmatically.

Prior to calling the FOProcessor API create a Properties class and assign a property to it for the parameter value as follows:

```
Properties prop = new Properties();
prop.put("xslt.InvThresh", "1000");
```

### Example 13-1 Example: Pass an invoice threshold parameter

This example illustrates how to declare a parameter in the template that filters the data based on the value of the parameter.

The following XML sample lists invoice data:

```
<INVOICES>
<INVOICE>
  <INVOICE_NUM>981110</INVOICE_NUM>
  <AMOUNT>1100</AMOUNT>
</INVOICE>
<INVOICE>
  <INVOICE_NUM>981111</INVOICE_NUM>
  <AMOUNT>250</AMOUNT>
</INVOICE>
<INVOICE>
  <INVOICE_NUM>981112</INVOICE_NUM>
  <AMOUNT>8343</AMOUNT>
</INVOICE>
...
</INVOICES>
```

The following illustration shows a template that accepts a parameter value to limit the invoices displayed in the final document based on the parameter value.

**InvThresh Declaration**

Invoice Number	Invoice Amount
FE IF 13222-2	\$100.00 EI EFE

Fields for defining parameters as shown in the template in the previous illustration:

- InvThreshDeclaration - Form Field Help Text Entry: `<?param@begin:InvThresh?>` - Declares the parameter InvThresh.
- FE - Form Field Help Text Entry: `<?for-each:INVOICE?>` - Begins the repeating group for the INVOICE element.
- IF - Form Field Help Text Entry: `<?if:AMOUNT>$InvThresh?>` - Tests the value of the AMOUNT element to determine if it's greater than the value of InvThresh.
- 13222-2 - Form Field Help Text Entry: `<?INVOICE_NUM?>` - Placeholder for the INVOICE\_NUM element.
- \$100.00 - Form Field Help Text Entry: `<?AMOUNT?>` - Placeholder for the AMOUNT element.
- EI - Form Field Help Text Entry: `<?end if?>` - Closing tag for the if statement.
- EFE - Form Field Help Text Entry: `<?end for-each?>` - Closing tag for the for-each loop.

In this template, only INVOICE elements with an AMOUNT greater than the InvThresh parameter value are displayed. If you pass in a parameter value of 1,000, then the report that is shown in the following illustration is produced.

Invoice Number	Invoice Amount
981110	1100
981112	8343

Notice the second invoice doesn't display because its amount was less than the parameter value.

## Set Properties

The properties in the configuration file can alternatively be embedded into the RTF template.

The properties set in the template are resolved at runtime. You can either hard code the values in the template or embed the values in the incoming XML data. Embedding the properties in the template avoids the use of the configuration file.

For example, if you use a nonstandard font in the template, then rather than specify the font location in the configuration file, you can embed the font property inside the template. If you must secure the generated PDF output, then you can use the PDF security properties and obtain the password value from the incoming XML data.

To add a property to a template, use the Microsoft Word Properties dialog (available from the **File** menu), and enter the following information:

- **Name** - Enter the property name prefixed with "xdo-"
- **Type** - Select "Text"
- **Value** - Enter the property value. To reference an element from the incoming XML data, enter the path to the XML element enclosed by curly braces. For example: `{/root/password}`

### Embed a Font Reference

For this example, suppose you want to use a font in the template called "XMLPScript". This font isn't available on the server; therefore you must define where to find the font at runtime by setting the "font" property. Assume the font is located in "/tmp/fonts", then you would enter the following in the Properties dialog:

- **Name** - xdo-font.XMLPScript.normal.normal
- **Type** - Text
- **Value** - truetype./tmp/fonts/XMLPScript.ttf

When the template is applied to the XML data on the server, the font is looked up in the /tmp/fonts directory. Note that if the template is deployed in multiple locations, then you must ensure that the path is valid for each location.

### Secure a PDF Output

For this example, suppose you want to use a password from the XML data to secure the PDF output document. The XML data is as follows:

```
<PO>
<security>true</security>
<password>welcome</password>
<PO_DETAILS>
..
</PO>
```

In the Properties dialog set two properties: pdf-security to set the security feature as enabled or not, and pdf-open-password to set the password. Enter the following in the Properties dialog:

- **Name:** xdo-pdf-security
- **Type:** Text
- **Value:** `{/PO/security}`
- **Name:** xdo-pdf-open-password
- **Type:** Text
- **Value:** `{/PO/password}`

Storing the password in the XML data isn't recommended if the XML persists in the system for any length of time. To avoid this potential security risk, you can use a template parameter value that's generated and passed into the template at runtime.

For example, you could set up the following parameters:

- PDFSec - To pass the value for the xdo-pdf-security property
- PDFPWD - To pass the value for the password

You would then enter the following in the Properties dialog:

- **Name** - xdo-pdf-security
- **Type** - Text
- **Value** - {\$PDFSec}
- **Name** - xdo-pdf-open-password
- **Type** - Text
- **Value** - {\$PDFPWD}

To set the template parameters, see [Set Parameters](#).

## Use Advanced Report Layouts

Learn more about Advanced Report Layouts.

This section describes the following tasks for advanced report layouts:

- [Create Batch Reports](#)
- [Handle No Data Found Conditions](#)
- [Insert Pivot Tables](#)
- [Construct Dynamic Data Columns](#)

## Create Batch Reports

It's a common requirement to print a batch of documents, such as invoices or purchase orders in a single PDF file. Because these documents are intended for different customers, each document requires that the page numbering be reset and that page totals are specific to the document. If the header and footer display fields from the data (such as customer name), then these must be reset as well.

Publisher supports this requirement through the use of a context command. This command allows you to define elements of the report to a specific section. When the section changes, these elements are reset.

The following example demonstrates how to reset the header and footer and page numbering within an output file:

The following XML code is a report that contains multiple invoices:

```
...
<LIST_G_INVOICE>
  <G_INVOICE>
    <BILL_CUST_NAME>Vision, Inc. </BILL_CUST_NAME>
    <TRX_NUMBER>2345678</TRX_NUMBER>
  ...
</G_INVOICE>
<G_INVOICE>
  <BILL_CUST_NAME>Oracle, Inc. </BILL_CUST_NAME>
  <TRX_NUMBER>2345685</TRX_NUMBER>
  ...
</G_INVOICE>
...
```

</LIST\_G\_INVOICE>  
...

Each G\_INVOICE element contains an invoice for a potentially different customer. To instruct Publisher to start a new section for each occurrence of the G\_INVOICE element, add the @section command to the opening for-each statement for the group, using the following syntax:

<?for-each@section:group name?>

where *group\_name* is the name of the element for which you want to begin a new section.

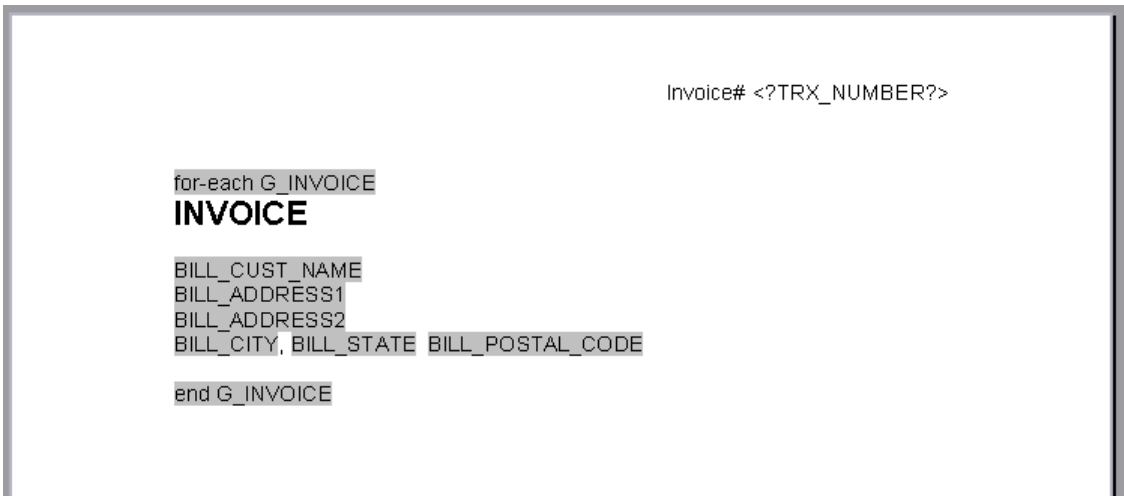
For example, the for-each grouping statement for this example is as follows:

<?for-each@section:G\_INVOICE?>

The closing <?end for-each?> tag is not changed.

The following figure shows a sample template for batch reports:

The G\_INVOICE group for-each declaration is still within the body of the report, even though the headers are reset by the command.



The following table describes the values of the form fields from the template in the previous figure (that shows a sample template for batch reports):

Default Text Entry	Form Field Help Text	Description
for-each G_INVOICE	<?for-each@section:G_INVOICE?>	Begins the G_INVOICE group, and defines the element as a Section. For each occurrence of G_INVOICE, a new section is started.
<?TRX_NUMBER?>	N/A	Microsoft Word doesn't support form fields in the header, therefore the placeholder syntax for the TRX_NUMBER element is placed directly in the template.
end G_INVOICE	<?end for-each?>	Closes the G_INVOICE group.

Now for each new occurrence of the G\_INVOICE element, a new section begins. The page numbers restart, and if header or footer information is derived from the data, it's reset as well.

## Handle No Data Found Conditions

When you use @section with the Publisher commands for-each or for-each-group (for example: <?for-each@section:ELEMENT\_NAME?>), and the input data file has no data, then an empty or invalid PDF output document may be generated for that for-each loop. To prevent this from happening, edit the RTF template.

To handle no data found conditions:

1. At the end of the RTF template, add a section break.
2. On the last page (the new section page), add the command <?if@section:not(ELEMENT\_NAME)?>No Data Found<?end if?>

where ELEMENT\_NAME is the same data element that you are using in the for-each@section loop.

Now if no data exists for ELEMENT\_NAME, a valid PDF is generated with the text "No Data Found".

## Insert Pivot Tables

The columns of a pivot table are data dependent.

At design time you do not know how many columns are reported, or what the appropriate column headings are. Moreover, if the columns should break onto a second page, you must be able to define the row label columns to repeat onto subsequent pages. The following example shows how to design a simple pivot table report that supports these features. See [Insert a Pivot Table](#).

This example uses the following XML sample:

```
<ROWSET>
  <RESULTS>
    <INDUSTRY>Motor Vehicle Dealers</INDUSTRY>
    <YEAR>2005</YEAR>
    <QUARTER>Q1</QUARTER>
    <SALES>1000</SALES>
  </RESULTS>
  <RESULTS>
    <INDUSTRY>Motor Vehicle Dealers</INDUSTRY>
    <YEAR>2005</YEAR>
    <QUARTER>Q2</QUARTER>
    <SALES>2000</SALES>
  </RESULTS>
  <RESULTS>
    <INDUSTRY>Motor Vehicle Dealers</INDUSTRY>
    <YEAR>2004</YEAR>
    <QUARTER>Q1</QUARTER>
    <SALES>3000</SALES>
  </RESULTS>
  <RESULTS>
    <INDUSTRY>Motor Vehicle Dealers</INDUSTRY>
    <YEAR>2004</YEAR>
    <QUARTER>Q2</QUARTER>
```



```

    <SALES>3000</SALES>
  </RESULTS>
</RESULTS>
  <INDUSTRY>Motor Vehicle Dealers</INDUSTRY>
  <YEAR>2003</YEAR>
  ...
</RESULTS>
</RESULTS>
  <INDUSTRY>Home Furnishings</INDUSTRY>
  ...
</RESULTS>
</RESULTS>
  <INDUSTRY>Electronics</INDUSTRY>
  ...
</RESULTS>
</RESULTS>
  <INDUSTRY>Food and Beverage</INDUSTRY>
  ...
</RESULTS>

</ROWSET>

```

From this XML code, a report is generated that shows each industry and totals the sales by year as shown in the following illustration.

Industry	2005	2004	2003
Motor Vehicle Dealers	3000	6000	1200
Home Furnishings	3200	7770	3300
Electronics	9000	9000	4300
Food and Beverage	1200	900	5600

The following illustration shows the template to generate the report that is shown in the previous illustration.

<b>Industry</b> header column	for: <b>YEAR</b> end
for: <b>INDUSTRY</b>	for: sum(SALES) end end

The form fields in the template that is shown in the previous illustration have the values that are described in the following table.

Default Text Entry	Form Field Help Text	Description
header column	<?horizontal-break-table:1?>	Defines the first column as a header that should repeat if the table breaks across pages. See <a href="#">Define Columns to Repeat Across Pages</a> .
for:	<?for-each-group@column:RESULTS;YEAR?>	Uses the regrouping syntax (see <a href="#">Regroup the XML Data</a> ) to group the data by YEAR; and the @column context command to create a table column for each group (YEAR). See <a href="#">Control the Placement of Instructions Using the Context Commands</a> .
YEAR	<?YEAR?>	Placeholder for the YEAR element.
end	<?end for-each-group?>	Closes the for-each-group loop.
for:	<?for-each-group:RESULTS;INDUSTRY?>	Begins the group to create a table row for each INDUSTRY.
INDUSTRY	<?INDUSTRY?>	Placeholder for the INDUSTRY element.
for:	<?for-each-group@cell:current-group();YEAR?>	Uses the regrouping syntax (see <a href="#">Regroup the XML Data</a> ) to group the data by YEAR; and the @cell context command to create a table cell for each group (YEAR).
sum(Sales)	<?sum(current-group())//SALES?>	Sums the sales for the current group (YEAR).
end	<?end for-each-group?>	Closes the for-each-group statement.
end	<?end for-each-group?>	Closes the for-each-group statement.

Note that only the first row uses the @column context to determine the number of columns for the table. All remaining rows must use the @cell context to create the table cells for the column. See [Control the Placement of Instructions Using the Context Commands](#).

## Construct Dynamic Data Columns

The ability to construct dynamic data columns is a very powerful feature of the RTF template. Using this feature you can design a template that correctly renders a table when the number of columns that is required by the data is variable.

For example, you are designing a template to display columns of test scores within specific ranges. However, you do not know how many ranges have data to report. You can define a dynamic data column to split into the correct number of columns at runtime.

Use the following tags to accommodate the dynamic formatting required to render the data correctly:

- Dynamic Column Header

<?split-column-header:group element name?>

Use this tag to define which group to split for the column headers of a table.

- Dynamic Column <?split-column-data:group element name?>

Use this tag to define which group to split for the column data of a table.

- Dynamic Column Width

<?split-column-width:name?> or

<?split-column-width:@width?>

Use one of these tags to define the width of the column when the width is described in the XML data. The width can be described in two ways:

- An XML element stores the value of the width. In this case, use the syntax `<?split-column-width:name?>`, where *name* is the XML element tag name that contains the value for the width.
- If the element defined in the `split-column-header` tag, contains a width attribute, use the syntax `<?split-column-width:@width?>` to use the value of that attribute.
- Dynamic Column Width's unit value (in points) `<?split-column-width-unit:value?>`

Use this tag to define a multiplier for the column width. If the column widths are defined in character cells, then you must use the appropriate multiplier value to render the columns to the correct width in points. For example, if you are using 10 point courier font in the table, you would use a multiplier of 6, which is the approximate width of a character displayed in 10 point courier font. If the multiplier isn't defined, then the widths of the columns are calculated as a percentage of the total width of the table. The column width calculations are illustrated in the following table:

Width Definition	Column 1 (Width = 10)	Column 2 (Width = 12)	Column 3 (Width = 14)
Multiplier not present -% width	10/10+12+14*100 28%	%Width = 33%	%Width =39%
Multiplier = 6 - width	60 pts	72 pts	84 pts

## Define Columns to Repeat Across Pages

If the table columns expand horizontally across more than one page, you can define how many row heading columns you want to repeat on every page. This functionality is supported for PDF output.

Use the following syntax to specify the number of columns to repeat:

`<?horizontal-break-table:number?>`

where *number* is the number of columns (starting from the left) to repeat.

## Example of Dynamic Data Columns

A template is required to display test score ranges for school exams. Logically, you want the report to be arranged as shown in the table here.

Test Score	Test Score Range 1	Test Score Range 2	Test Score Range 3	...Test Score Range n
Test Category	# students in Range 1	# students in Range 2	# students in Range 3	# of students in Range n

However, you don't know how many Test Score Ranges are reported. The number of Test Score Range columns is dynamic, depending on the data.

The following XML data describes these test scores. The number of occurrences of the element `<TestScoreRange>` determine how many columns are required. In this case there're five

columns: 0-20, 21-40, 41-60, 61-80, and 81-100. For each column there's an amount element (<NumOfStudents>) and a column width attribute (<TestScore width="15">).

```
<?xml version="1.0" encoding="utf-8"?>
<TestScoreTable>
  <TestScores>
    <TestCategory>Mathematics</TestCategory>
    <TestScore width="15">
      <TestScoreRange>0-20</TestScoreRange>
      <NumofStudents>30</NumofStudents>
    </TestScore>
    <TestScore width="20">
      <TestScoreRange>21-40</TestScoreRange>
      <NumofStudents>45</NumofStudents>
    </TestScore>
    <TestScore width="15">
      <TestScoreRange>41-60</TestScoreRange>
      <NumofStudents>50</NumofStudents>
    </TestScore>
    <TestScore width="20">
      <TestScoreRange>61-80</TestScoreRange>
      <NumofStudents>102</NumofStudents>
    </TestScore>
    <TestScore width="15">
      <TestScoreRange>81-100</TestScoreRange>
      <NumofStudents>22</NumofStudents>
    </TestScore>
  </TestScores>
</TestScoreTable>
```

Using the dynamic column tags in form fields, set up the table in two columns as shown in the following figure. The first column, Test Score is static. The second column, Column Header and Splitting is the dynamic column. At runtime this column is split according to the data, and the header for each column is appropriately populated. The Default Text entry and Form Field Help entry for each field are listed in the following table.

Test Score	Column Header and Splitting
Group:TestScores Test Category	Content and Splitting end:TestScores

Default Text Entry	Form Field Help Text Entry
Group:TestScores	<?for-each:TestScores?>
Test Category	<?TestCategory?>
Column Header and Splitting	<?split-column-header:TestScore?> <?split-column-width:@width?> <?TestScoreRange?>%
Content and Splitting	<?split-column-data:TestScore?> <?NumofStudents?>
end:TestScores	<?end for-each?>

- Test Score is the boilerplate column heading.

- Test Category is the placeholder for the <TestCategory> data element, that is, Mathematics, which is also the row heading.
- The second column is the one to be split dynamically. The width you specify is divided by the number of columns of data. In this case, there're 5 data columns.
- The second column contains the dynamic range data. The width of the column is divided according to the split column width. Because this example doesn't contain the unit value tag (<?split-column-width-unit:value?>), the column is split on a percentage basis. Wrapping of the data occurs if required.

If the tag (<?split-column-width-unit:value?>) were present, then the columns have a specific width in points. If the total column widths were wider than the allotted space on the page, then the table breaks onto another page.

The horizontal-break-table tag could then be used to specify how many columns to repeat on the subsequent page. For example, a value of 1 would repeat the column Test Score on the subsequent page, with the continuation of the columns that didn't fit on the first page.

The template renders the output that is shown in the following figure:

Test Score	0-20	21-40	41-60	61-80	81-100
Mathematics	30	45	50	102	22

## Format Numbers, Dates, and Currencies

This section provides details for formatting numbers, dates, and currencies.

It contains the following topics:

- [Format Numbers](#)
- [Format Dates](#)
- [Format Currencies](#)

### Format Numbers

You can use two methods for specifying the number format.

- Oracle's format-number function (recommended).
- Microsoft Word's Native number format mask.

You can also use the native XSL format-number function to format numbers. For information, see [Format Native XSL Numbers](#).

Use only one of these methods. If the number format mask is specified using both methods, then the data is formatted twice, causing unexpected behavior.

The group separator and the number separator are set at runtime based on the template locale. If you are working in a locale other than en-US, or the templates require translation, use the Oracle format masks.

## Data Source Requirements

To use the Oracle format mask or the Microsoft format mask, the numbers in the data source must be in a raw format, with no formatting applied (for example: 1000.00). If the number has been formatted for European countries (for example: 1.000,00) then the format won't work.

The Publisher parser requires the Java BigDecimal string representation. This consists of an optional sign ("-") followed by a sequence of zero or more decimal digits (the integer), optionally followed by a fraction, and optionally followed by an exponent. For example: -123456.3455e-3.

## Localization Considerations

If you are working in a locale other than en-US, or the templates require translation, then use the Oracle format masks.

The Microsoft format masks can generate unexpected results in templates run in different locale settings.

Do not include "%" in the format mask because this fixes the location of the percent sign in the number display, while the desired position could be at the beginning or the end of a number, depending on the locale.

## Use the Microsoft Number Format Mask

To format numeric values, use Microsoft Word's field formatting features available from the Text Form Field Options dialog.

To apply a number format to a form field:

1. Open the Form Field Options dialog for the placeholder field.
2. Set the **Type** to Number.
3. Select the appropriate **Number format** from the list of options.

## Supported Microsoft Format Mask Definitions

You can use several format mask definitions to standardize the report output.

The following table lists the supported Microsoft format mask definitions for pixel-perfect reports.

Symbol	Location	Meaning
0	Number	Digit. Each explicitly set 0 appears, if no other number occupies the position. Example: Format mask: 00.0000 Data: 1.234 Display: 01.2340

Symbol	Location	Meaning
#	Number	Digit. When set to #, only the incoming data is displayed. Example: Format mask: ##.#### Data: 1.234 Display: 1.234
.	Number	Determines the position of the decimal separator. The decimal separator symbol used is determined at runtime based on template locale. Example: Format mask: #,##0.00 Data: 1234.56 Display for English locale: 1,234.56 Display for German locale: 1.234,56
-	Number	Determines placement of minus sign for negative numbers.
,	Number	Determines the placement of the grouping separator. The grouping separator symbol used is determined at runtime based on template locale. Example: Format mask: #,##0.00 Data: 1234.56 Display for English locale: 1,234.56 Display for German locale: 1.234,56
E	Number	Separates mantissa and exponent in a scientific notation. Example: 0.###E+0 plus sign always shown for positive numbers 0.###E-0 plus sign not shown for positive numbers
;	Subpattern boundary	Separates positive and negative subpatterns. See the Note that follows the table.
%	Prefix or Suffix	Multiply by 100 and show as percentage
'	Prefix or Suffix	Used to quote special characters in a prefix or suffix.

Subpattern boundary: A pattern contains a positive and negative subpattern, for example, "#,##0.00;(##0.00)". Each subpattern has a prefix, numeric part, and suffix. The negative subpattern is optional. If absent, the positive subpattern prefixed with the localized minus sign ("-") in most locales) is used as the negative subpattern. That is, "0.00" alone is equivalent to "0.00;-0.00". If there's an explicit negative subpattern, it serves only to specify the negative prefix and suffix. The number of digits, minimal digits, and other characteristics are all the same as the positive pattern. That means that "#,##0.0#;(##)" produces precisely the same behavior as "#,##0.0#;(##0.0#)".

## Use the Oracle Format Mask

You can use the Oracle format mask in form fields.

To apply the Oracle format mask to a form field:

1. Open the Form Field Options dialog box for the placeholder field.
2. Set the **Type** to "Regular text".

3. In the Form Field Help Text field, enter the mask definition according to the following example:

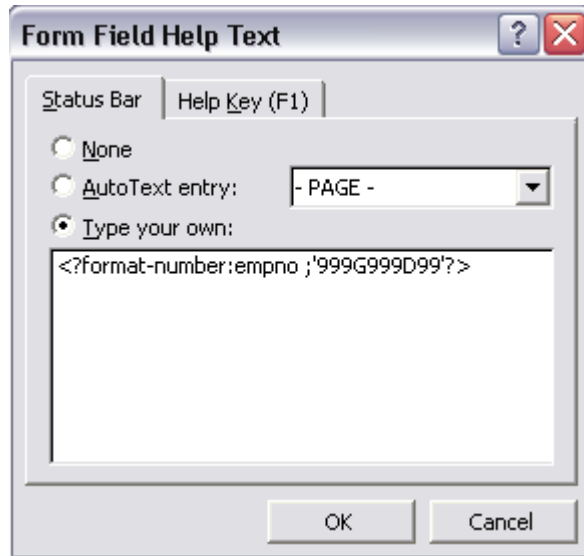
```
<?format-number:fieldname;'999G999D99'?>
```

where

*fieldname* is the XML tag name of the data element you are formatting and

*999G999D99* is the mask definition.

The following illustration shows an example Form Field Help Text dialog entry for the data element "empno".



Supported Oracle number format mask symbols and their definitions:

- 0 - Digit. Each explicitly set 0 appears, if no other number occupies the position. Example: Format mask: 00.0000 Data: 1.234 Display: 01.2340
- 9 - Digit. Returns value with the specified number of digits with a leading space if positive or a leading minus if negative. Leading zeros are blank, except for a zero value, which returns a zero for the integer part of the fixed-point number. Example: Format mask: 99.9999 Data: 1.234 Display: 1.234
- C - Returns the ISO currency symbol in the specified position.
- D - Determines the placement of the decimal separator. The decimal separator symbol used is determined at runtime based on template locale. For example: Format mask: 9G999D99 Data: 1234.56 Display for English locale: 1,234.56 Display for German locale: 1.234,56
- EEEE - Returns a value in scientific notation.
- G - Determines the placement of the grouping (thousands) separator. The grouping separator symbol used is determined at runtime based on template locale. For example: Format mask: 9G999D99 Data: 1234.56 Display for English locale: 1,234.56 Display for German locale: 1.234,56
- L - Returns the local currency symbol in the specified position.
- MI - Displays negative value with a trailing "-".



- PR - Displays negative value enclosed by <>.
- PT - Displays negative value enclosed by ().
- S (before number) - Displays positive value with a leading "+" and negative values with a leading "-".
- S (after number) - Displays positive value with a trailing "+" and negative value with a trailing "-".

## Format Dates

Publisher supports three methods for specifying the date format.

- Specify an explicit date format mask using Microsoft Word's native date format mask.
- Specify an explicit date format mask using Oracle's format-date function.
- Specify an abstract date format mask using Oracle's abstract date format masks. (Recommended for multilingual templates.)

Use only one method. If both the Oracle and MS format masks are specified, the data is formatted twice, which causes unexpected behavior.

## Data Source Requirements

To use the Microsoft format mask or the Oracle format mask, the date from the XML data source must be in canonical format.

Format:

YYYY-MM-DDThh:mm:ss+HH:MM

where

- YYYY is the year
- MM is the month
- DD is the day
- T is the separator between the date and time component
- hh is the hour in 24-hour format
- mm is the minutes
- ss is the seconds
- +HH:MM is the time zone offset from Universal Time (UTC), or Greenwich Mean Time

An example of this construction is:

2005-01-01T09:30:10-07:00

The data after the "T" is optional, therefore the following date: 2005-01-01 can be formatted using either date formatting option.

If the time component and time zone offset are not included in the XML source date, then Publisher assumes it represents 12:00 AM UTC (that is, yyyy-mm-ddT00:00:00-00:00).

## Use the Microsoft Date Format Mask

To format date values, use Microsoft Word's field formatting features available from the Form Field Options dialog.

To apply a date format to a form field:

1. Open the Form Field Options dialog box for the placeholder field.
2. Set the **Type** to Date, Current Date, or Current Time.
3. Select the appropriate **Date format** from the list of options.

If you don't specify the mask in the **Date format** field, then the abstract format mask "MEDIUM" is used as default.

Supported Microsoft date format masks:

- d - The day of the month. Single-digit days don't have a leading zero.
- dd - The day of the month. Single-digit days have a leading zero.
- ddd - The abbreviated name of the day of the week, as defined in AbbreviatedDayNames.
- dddd - The full name of the day of the week, as defined in DayNames.
- M - The numeric month. Single-digit months don't have a leading zero.
- MM - The numeric month. Single-digit months have a leading zero.
- MMM - The abbreviated name of the month, as defined in AbbreviatedMonthNames.
- yy - The year without the century. If the year without the century is less than 10, the year is displayed with a leading zero.
- yyyy - The year in four digits.
- gg - The period or era. This pattern is ignored if the date to be formatted doesn't have an associated period or era string.
- h - The hour in a 12-hour clock. Single-digit hours don't have a leading zero.
- H - The hour in a 24-hour clock. Single-digit hours don't have a leading zero.
- HH - The hour in a 24-hour clock. Single-digit hours have a leading zero.
- m - The minute. Single-digit minutes don't have a leading zero.
- mm - The minute. Single-digit minutes have a leading zero.
- s - The second. Single-digit seconds don't have a leading zero.
- ss - The second. Single-digit seconds do have a leading zero.
- f - Displays seconds fractions represented in one digit.
- ff - Displays seconds fractions represented in two digits.
- fff - Displays seconds fractions represented in three digits.
- ffff - Displays seconds fractions represented in four digits.
- fffff - Displays seconds fractions represented in five digits.
- ffffff - Displays seconds fractions represented in six digits.
- fffffff - Displays seconds fractions represented in seven digits.
- tt - The AM/PM designator defined in AMDesignator or PMDesignator, if any.

- z - Displays the time zone offset for the system's current time zone in whole hours only. (This element can be used for formatting only)
- zz - Displays the time zone offset for the system's current time zone in whole hours only. (This element can be used for formatting only)
- zzz - Displays the time zone offset for the system's current time zone in hours and minutes.
- : - The default time separator defined in TimeSeparator.
- / - The default date separator defined in DateSeparator.
- ' - Quoted string. Displays the literal value of any string between two ' characters.
- " - Quoted string. Displays the literal value of any string between two " characters.

## Use the Oracle Format Mask

Use the Oracle format mask to specify how date and time displays.

1. Open the **Form Field Options** dialog box for the placeholder field.
2. Set the **Type** to Regular Text.
3. Select the **Add Help Text...** button to open the **Form Field Help Text** dialog.
4. Insert the following syntax to specify the date format mask:

```
<?format-date:date_string; 'ABSTRACT_FORMAT_MASK';TIMEZONE'?>
```

or

```
<?format-date-and-calendar:date_string; 'ABSTRACT_FORMAT_MASK';CALENDAR_NAME';TIMEZONE'?>
```

where time zone is optional. The detailed usage of format mask, calendar and time zone is described below.

If no format mask is specified, then the abstract format mask "MEDIUM" is used as the default.

Example form field help text entry:

```
<?format-date:hiredate;'YYYY-MM-DD'?>
```

Supported Oracle format mask symbols:

- - / , . ; : "text" - Punctuation and quoted text are reproduced in the result.
- AD A.D. - AD indicator with or without periods.
- AM A.M. - Meridian indicator with or without periods.
- BC B.C. - BC indicator with or without periods.
- CC - Century. For example, 2002 returns 21; 2000 returns 20.
- DAY - Name of day, padded with blanks to length of 9 characters.
- D - Day of week (1-7).
- DD - Day of month (1-31).
- DDD - Day of year (1-366).
- DL - Returns a value in the long date format.
- DS - Returns a value in the short date format.
- DY - Abbreviated name of day.
- E - Abbreviated era name.

- EE - Full era name.
- FF[1..9] - Fractional seconds. Use the numbers 1 to 9 after FF to specify the number of digits in the fractional second portion of the datetime value returned. Example: 'HH:MI:SS.FF3'
- HH - Hour of day (1-12).
- HH12 - Hour of day (1-12).
- HH24 - Hour of day (0-23).
- MI - Minute (0-59).
- MM - Month (01-12; JAN = 01).
- MON - Abbreviated name of month.
- MONTH - Name of month, padded with blanks to length of 9 characters.
- PM P.M. - Meridian indicator with or without periods.
- RR - Lets you store 20th century dates in the 21st century using only two digits.
- RRRR - Round year. Accepts either 4-digit or 2-digit input. If 2-digit, provides the same return as RR. If you do not want this functionality, then simply enter the 4-digit year.
- SS - Seconds (0-59).
- TZD - Daylight savings information. The TZD value is an abbreviated time zone string with daylight savings information. It must correspond to the region specified in TZR. Example: PST (for Pacific Standard Time), PDT (for Pacific Daylight Time)
- TZH - Time zone hour. (See TZM format element.)
- TZM - Time zone minute. (See TZH format element.) Example: 'HH:MI:SS.FFTZH:TZM'
- TZR - Time zone region information. The value must be one of the time zone regions supported in the database. Example: PST (Pacific Standard Time)
- WW - Week of year (1-53) where week 1 starts on the first day of the year and continues to the seventh day of the year.
- W - Week of month (1-5) where week 1 starts on the first day of the month and ends on the seventh.
- X - Local radix character.
- YYYY - 4-digit year.
- YY Y - Last 2, or 1 digit(s) of year.

## Default Format Mask

If you do not want to specify a format mask with either the MS method or the Oracle method, you can omit the mask definition and use the default format mask. The default format mask is the MEDIUM abstract format mask from Oracle.

To use the default option using the Microsoft method, set the **Type** to Date, but leave the **Date format** field blank in the Text Form Field Options dialog.

To use the default option using the Oracle method, do not supply a mask definition to the "format-date" function call. For example:

```
<?format-date:hiredate?>
```

## Oracle Abstract Format Masks

The abstract date format masks reflect the default implementations of date/time formatting in the I18N library.

When you use one of these masks, the output generated depends on the locale that is associated with the report.

Specify the abstract mask using the following syntax:

```
<?format-date:fieldname;'MASK'?>
```

where *fieldname* is the XML element tag and

MASK is the Oracle abstract format mask name

For example:

```
<?format-date:hiredate;'SHORT'?>
<?format-date:hiredate;'LONG_TIME_TZ'?>
<?format-date:xdoxslt:sysdate_as_xsdformat();'MEDIUM'?>
```

The following table lists the abstract format masks and the sample output that would be generated for the US locale.

Mask	Output for US Locale
SHORT	2/31/99
MEDIUM	Dec 31, 1999
LONG	Friday, December 31, 1999
SHORT_TIME	12/31/99 6:15 PM
MEDIUM_TIME	Dec 31, 1999 6:15 PM
LONG_TIME	Friday, December 31, 1999 6:15 PM
SHORT_TIME_TZ	12/31/99 6:15 PM GMT
MEDIUM_TIME_TZ	Dec 31, 1999 6:15 PM GMT
LONG_TIME_TZ	Friday, December 31, 1999 6:15 PM GMT

## Display the System Date (sysdate) in Reports

To correctly display the sysdate, use the function `xdoxslt:sysdate_as_xsdformat()` with the `<?format-date:??>` command.

For example:

```
<?format-date:xdxslt:sysdate_as_xsdformat();'MEDIUM'?>
```

```
<?format-date:xdxslt:sysdate_as_xsdformat();'LONG'?>
```

```
<?format-date:xdxslt:sysdate_as_xsdformat();'LONG_TIME_TZ'?>
```

```
<?format-date-and-calendar:xdxslt:sysdate_as_xsdformat();  
'LONG_TIME';'ROC_OFFICIAL';?>
```

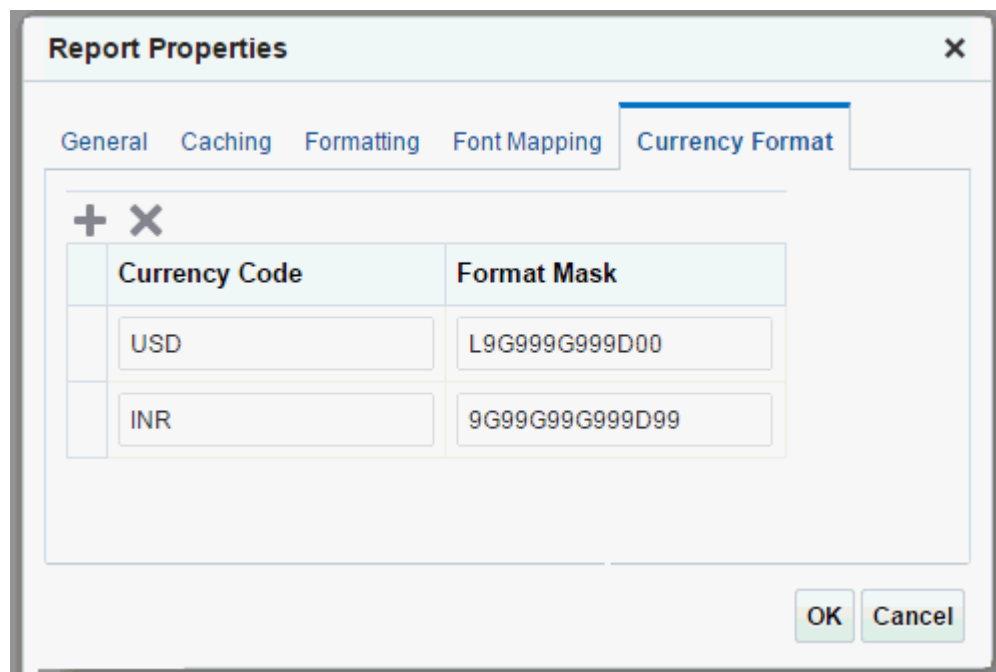
## Format Currencies

Publisher enables you to define specific currency format masks to apply to the published data at runtime.

To utilize currency formatting in the RTF template:

1. Set up the currency formats in the runtime configuration properties. The currency formats can be defined at the system level or at the report level.

When you set up the currency format property, you define the format to be used for a specified currency, using the International Standards Organization (ISO) currency code. A sample is shown in the following figure:



2. Enter the format-currency command in the RTF template to apply the format to the field at runtime.

## Apply a Currency Format to a Field

Follow these steps to understand the parameters for the format-currency function and to apply a currency format to a field.

The parameters for the format-currency function are as follows:

```
<?format-currency:Amount_Field;CurrencyCode;displaySymbolOrNot?>
```

where

`Amount_Field` takes the tag name of the XML element that holds the amount value in the data.

`CurrencyCode` can either be set to a static value or it can be set dynamically. If the value is static for the report, then enter the ISO three-letter currency code in single quotes, for example, 'USD'.

To set the value dynamically, enter the tag name of the XML element that holds the ISO currency code. Note that an element that contains the currency code must be present in the data.

At runtime, the `Amount_Field` is formatted according to the format you set up for the currency code in the report properties.

`displaySymbolOrNot` takes one of the following values: true or false. When set to true, the currency symbol is displayed in the report based on the value for **CurrencyCode**. If you do not want the currency symbol to be displayed, then you can either enter false or simply do not specify the parameter.

## Example: Display Multiple Currency Formats in a Report

The table here provides an example that assumes you've set up the various currency formats in the report properties.

Currency Code	Format Mask
USD	9G999D99
INR	9G99G999G999D99

In this example, you need not set the currency code dynamically. You've the following elements in the XML data:

```
<TOTAL_SALES>
  <US_SALES>8596526459.56</US_SALES>
  <INDIA_SALES>60000000</INDIA_SALES>
</TOTAL_SALES>
```

You want to display these two total fields in the template.

For `US_SALES`, the syntax in the Publisher properties field is as follows:

```
<?format-currency:US_SALES;'USD'?>
```

At runtime, the fields are displayed as shown in the following figure:

India Sales: 6,00,00,000.00  
US Sales: 8,596,526,459.56

## Example: Display Multiple Currency Codes in a Single Report

This simple XML code includes an element that contains the Amount (Trans\_amount) and an element that contains the ISO currency code (Cur\_Code).

```
<ROW>
  <Trans_Amount>123</Trans_Amount>
  <Cur_Code>USD</Cur_Code>
</ROW>
<ROW>
  <Trans_Amount>-456</Trans_Amount>
  <Cur_Code>GBP</Cur_Code>
</ROW>
<ROW>
  <Trans_Amount>748</Trans_Amount>
  <Cur_Code>EUR</Cur_Code>
</ROW>
<ROW>
  <Trans_Amount>-987</Trans_Amount>
  <Cur_Code>JPY</Cur_Code>
</ROW>
```

To display each of these amounts with the appropriate currency symbol, enter the following in the template for the field in which you want the amounts to display:

```
<?format-currency:Trans_Amount;Cur_Code;'true'?>
```

The following figure shows the multiple currency report that is generated:

USD Amount:	\$123.00
GBP Amount:	-£456.00
EUR Amount:	€ 748.00
JPY Amount:	-¥987

## Support Calendars and Time Zones

This section describes support for calendars and time zones.



## Calendar Specification

The term *calendar* refers to the calendar date displayed in the published report.

The following types are supported:

- GREGORIAN
- ARABIC\_HIJRAH
- ENGLISH\_HIJRAH
- JAPANESE\_IMPERIAL
- THAI\_BUDDHA
- ROC\_OFFICIAL (Taiwan)

Use one of the following methods to set the calendar type:

- Call the format-date-and-calendar function and declare the calendar type.

For example: `<?format-date-and-calendar:hiredate;'LONG_TIME_TZ';'ROC_OFFICIAL';?>`

The following figure shows the output generated using this definition with locale set to zh-TW and time zone set to Asia/Taipei:

中華民國88年12月31日 星期五 下午 2:15 台北

- Set the calendar type using the profile option XDO: Calendar Type (XDO\_CALENDAR\_TYPE).

Note that the calendar type that is specified in the template overrides the calendar type set in the profile option.

## Specify Time Zone

You can specify a time zone using a Java time zone string.

There're two ways to specify time zone information:

- Call the format-date or format-date-and-calendar function with the Oracle format.
- Set the user profile option Client Timezone (CLIENT\_TIMEZONE\_ID) in Oracle Applications.

If no time zone is specified, then the report time zone is used.

In the template, the time zone must be specified as a Java time zone string, for example, America/Los Angeles. The following example shows the syntax to enter in the help text field of the template:

`<?format-date:hiredate;'LONG_TIME_TZ';'Asia/Shanghai'?>`

## Specify No Time Zone Conversion

You can prevent a time zone from being converted to the user's local time zone.

To stop timezone conversion truncate the timezone component in the date-time XSD string. In reports that do not need timezone conversion, `<?format-date-nt: ...?>` is a convenient function to achieve no timezone conversion.

Use this RTF template command to prevent any time zone conversion on the date-time provided.

Syntax: `<?format-date-nt:<date_string>;'ABSTRACT_FORMAT_MASK'?>`

Examples:

```
<?format-date-nt:Hire_Date;'SHORT'?>
<?format-date-nt:xdxslt:sysdate_as_xsdformat();'MEDIUM'?>
<?format-date-nt:Hire_Date;'MEDIUM_TIME'?>
```

## Control the Placement of Instructions Using the Context Commands

The Publisher syntax is simplified XSL instructions. This syntax, along with any native XSL commands you may use in the template, is converted to XSL-FO at runtime. The placement of these instructions within the converted stylesheet determines the behavior of the template.

Publisher's RTF processor places these instructions within the XSL-FO stylesheet according to the most common context. However, sometimes you must define the context of the instructions differently to create a specific behavior. To support this requirement, Publisher provides a set of context commands that allow you to define the context (or placement) of the processing instructions. For example, using context commands, you can:

- Specify an if statement in a table to refer to a cell, a row, a column or the whole table.
- Specify a for-each loop to repeat either the current data or the complete section (to create new headers and footers and restart the page numbering)
- Define a variable in the current loop or at the beginning of the document.

You can specify a context for both processing commands using the Publisher syntax and those using native XSL.

- To specify a context for a processing command using the simplified Publisher syntax, simply add `@context` to the syntax instruction. For example:
    - `<?for-each@section:INVOICE?>` - Specifies that the group INVOICE should begin a new section for each occurrence. By adding the section context, you can reset the header and footer and page numbering.

If you do not want to restart the page numbering, then add the command: `<?initial-page-number:'auto'?>` after the `@section` command to continue the page numbering across sections.

  - `<?if@column:VAT?>` - Specifies that the if statement should apply to the VAT column only.
- To specify a context for an XSL command, add the `xdofo:ctx="context"` attribute to the tags to specify the context for the insertion of the instructions. The value of the context determines where the code is placed.

For example:

```
<xsl:for-each xdofo:ctx="section" select ="INVOICE">
<xsl:attribute xdofo:ctx="inblock" name="background-color">red</xsl:attribute>
```

Publisher supports the context types that are described in the following table:

Context	Description
section	The statement affects the whole section including the header and footer. For example, a <code>for-each@section</code> context command creates a new section for each occurrence - with restarted page numbering and header and footer. Note that you can retain continuous page numbering across sections by using the <code>&lt;?initial-page-number:'auto'?&gt;</code> command. See <a href="#">Create Batch Reports</a> for an example of this usage.
column	The statement affects the whole column of a table. This context is typically used to show and hide table columns depending on the data. See <a href="#">Format Columns</a> for an example.
cell	The statement affects the cell of a table. This is often used together with <code>@column</code> in pivot tables to create a dynamic number of columns. See <a href="#">Insert Pivot Tables</a> for an example.
block	The statement affects multiple complete fo:blocks (RTF paragraphs). This context is typically used for if and for-each statements. It can also be used to apply formatting to a paragraph or a table cell. See <a href="#">Highlight Cells</a> for an example.
inline	The context becomes the single statement inside an fo:inline block. This context is used for variables.
incontext	The statement is inserted immediately after the surrounding statement. This is the default for <code>&lt;?sort?&gt;</code> statements that must follow the surrounding for-each as the first element.
inblock	The statement becomes a single statement inside an fo:block (RTF paragraph). This is typically not useful for control statements (such as if and for-each) but is useful for statements that generate text, such as call-template.
inlines	The statement affects multiple complete inline sections. An inline section is text that uses the same formatting, such as a group of words rendered as bold. See <a href="#">Use If Statements in Boilerplate Text</a> . If you use <code>@inlines</code> with if syntax, any other if syntax inside the statement must use the context command <code>@inline</code> . If you use <code>@inlines</code> with FOR-EACH syntax any other if or FOR-EACH syntax inside the statement must use the context command <code>@inline</code> .
begin	The statement is placed at the beginning of the XSL stylesheet. This is required for global variables. See <a href="#">Set Parameters</a> .
end	The statement is placed at the end of the XSL stylesheet.

The following table shows the default context for the Publisher commands:

Command	Context
apply-template	inline
attribute	inline
call-template	inblock
choose	block
for-each	block
if	block
import	begin
param	begin

Command	Context
sort	incontext
template	end
value-of	inline
variable	end

## Use XPath Commands

XPath is an industry standard developed by the World Wide Web Consortium (W3C).

It's the method used to navigate through an XML document. XPath is a set of syntax rules for addressing the individual pieces of an XML document. You might not know it, but you've already used XPath; RTF templates use XPath to navigate through the XML data at runtime.

This section contains a brief introduction to XPath principles. XPath follows the Document Object Model (DOM), which interprets an XML document as a tree of nodes. A node can be one of seven types:

- root
- element
- attribute
- text
- namespace
- processing instruction
- comment

Many of these elements are shown in the following sample XML, which contains a catalog of CDs:

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- My CD Listing -->
<CATALOG>
  <CD cattype=Folk>
    <TITLE>Empire Burlesque</TITLE>
    <ARTIST>Bob Dylan</ARTIST>
    <COUNTRY>USA</COUNTRY>
    <PRICE>10.90</PRICE>
    <YEAR>1985</YEAR>
  </CD>
  <CD cattype=Rock>
    <TITLE>Hide Your Heart</TITLE>
    <ARTIST>Bonnie Tylor</ARTIST>
    <COUNTRY>UK</COUNTRY>
    <PRICE>9.90</PRICE>
    <YEAR>1988</YEAR>
  </CD>
</CATALOG>
```

The root node in this example is CATALOG. CD is an element, and it has an attribute cattype. The sample contains the comment My CD Listing. Text is contained within the XML document elements.

## Locate Data

Locate information in an XML document using location-path expressions.

A node is the most common search element that you encounter. Nodes in the example CATALOG XML include CD, TITLE, and ARTIST. Use a path expression to locate nodes within an XML document. For example, the following path returns all CD elements:

```
//CATALOG/CD
```

where

the double slash (//) indicates that all elements in the XML document that match the search criteria are to be returned, regardless of the level within the document.

the slash (/) separates the child nodes. All elements matching the pattern are returned.

To retrieve the individual TITLE elements, use the following command:

```
/CATALOG/CD/TITLE
```

This example returns the following XML:

```
<CATALOG>
<CD cattype=Folk>
  <TITLE>Empire Burlesque</TITLE>
</CD>
<CD cattype=Rock>
  <TITLE>Hide Your Heart</TITLE>
</CD>
</CATALOG>
```

Further limit the search by using square brackets. The brackets locate elements with certain child nodes or specified values. For example, the following expression locates all CDs recorded by Bob Dylan:

```
/CATALOG/CD[ARTIST="Bob Dylan"]
```

Or, if each CD element did not have an PRICE element, you could use the following expression to return only those CD elements that include a PRICE element:

```
/CATALOG/CD[PRICE]
```

Use the bracket notation to leverage the attribute value in the search. Use the @ symbol to indicate an attribute. For example, the following expression locates all Rock CDs (all CDs with the cattype attribute value Rock):

```
//CD[@cattype="Rock"]
```

This returns the following data from the sample XML document:

```
<CD cattype=Rock>
  <TITLE>Hide Your Heart</TITLE>
  <ARTIST>Bonnie Tylor</ARTIST>
  <COUNTRY>UK</COUNTRY>
  <PRICE>9.90</PRICE>
  <YEAR>1988</YEAR>
</CD>
```

You can also use brackets to specify the item number to retrieve. For example, the first CD element is read from the XML document using the following XPath expression:

```
/CATALOG/CD[1]
```

The sample returns the first CD element:

```
<CD cattype=Folk>
  <TITLE>Empire Burlesque</TITLE>
  <ARTIST>Bob Dylan</ARTIST>
  <COUNTRY>USA</COUNTRY>
  <PRICE>10.90</PRICE>
  <YEAR>1985</YEAR>
</CD>
```

XPath also supports wildcards to retrieve every element contained within the specified node. For example, to retrieve all the CDs from the sample XML, use the following expression:

```
/CATALOG/*
```

You can combine statements with Boolean operators for more complex searches. The following expression retrieves all Folk and Rock CDs, thus all the elements from the sample:

```
//CD[@cattype="Folk"]//CD[@cattype="Rock"]
```

The pipe (|) is equal to the logical OR operator. In addition, XPath recognizes the logical OR and AND, as well as the equality operators: <=, <, >, >=, ==, and !=. For example, you can find all CDs released in 1985 or later using the following expression:

```
/CATALOG/CD[YEAR >=1985]
```

## Start Reference

The first character in an XPath expression determines the point at which it should start in the XML tree.

Statements beginning with a forward slash (/) are considered absolute. No slash indicates a relative reference. An example of a relative reference is:

```
CD/*
```

This statement begins the search at the current reference point. That means if the example occurred within a group of statements the reference point left by the previous statement would be utilized.

As noted earlier, double forward slashes (//) retrieve every matching element regardless of location in the document, therefore the use of double forward slashes (//) should be used only when necessary to improve performance.

## Specify Context and Parents

To select current and parent elements, XPath recognizes the dot notation commonly used to navigate directories.

Use a single period (.) to select the current node and use double periods (..) to return the parent of the current node. For example, to retrieve all child nodes of the parent of the current node, use:

```
../*
```

Therefore, to access all CDs from the sample XML, use the following expression:

```
/CATALOG/CD/..
```

You could also access all the CD titles released in 1988 using the following:

```
/CATALOG/CD/TITLE[../YEAR=1988]
```

The two periods (..) are used to navigate up the tree of elements to find the YEAR element at the same level as the TITLE, where it's then tested for a match against "1988". You could also use // in this case, but if the element YEAR is used elsewhere in the XML document, then you might get erroneous results.

XPath is an extremely powerful standard when combined with RTF templates allowing you to use conditional formatting and filtering in the template.

## Declare Namespaces

If the XML data contains namespaces, you must declare them in the template prior to referencing the namespace in a placeholder. Declare the namespace in the template using either the basic RTF method or in a form field.

Enter the following syntax:

```
<?namespace:namespace name= namespace url?>
```

For example:

```
<?namespace:fsg=http://www.example.com/fsg/2002-30-20/?>
```

Once declared, you can use the namespace in the placeholder markup, for example: <?fsg:ReportName?>

## Use FO Elements and XSL Elements

This section describes how to use FO elements and XSL elements.

## Use FO Elements

You can use the native FO syntax inside the Microsoft Word form fields.

For more information on XSL-FO see the W3C Website.

The full list of FO elements that Publisher supports is in [Supported XSL-FO Elements](#).

## Use XSL Elements

You can use any XSL element in the template by inserting the XSL syntax into a form field.

If you are using the basic RTF method, you cannot insert XSL syntax directly into the template. Publisher has extended the following XSL elements for use in RTF templates.

To use these in a basic-method RTF template, you must use the Publisher Tag form of the XSL element. If you are using form fields, use either option.

## Apply a Template Rule

Use this element to apply a template rule to the current element's child nodes.

**XSL Syntax:** `<xsl:apply-templates select="name">`

**Publisher Tag:** `<?apply:name?>`

This function applies to `<xsl:template-match="n">`, where *n* is the element name.

## Copy the Current Node

Use this element to create a copy of the current node.

**XSL Syntax:** `<xsl:copy-of select="name">`

**Publisher Tag:** `<?copy-of:name?>`

## Call a Named Template

Use this element to call a named template to be inserted into or applied to the current template.

For example, use this feature to render a table multiple times.

**XSL Syntax:** `<xsl:call-template name="name">`

**Publisher Tag:** `<?call-template:name?>`

## Declare a Template

Use this element to apply a set of rules when a specified node is matched.

**XSL Syntax:** `<xsl:template name="name">`

**Publisher Tag:** `<?template:name?>`



## Declare a Variable

Use this element to declare a local or global variable.

**XSL Syntax:** `<xsl:variable name="name">`

**Publisher Tag:** `<?variable:name?>`

*Example:*

```
<xsl:variable name="color" select="'red'"/>
```

Assigns the value *red* to the *color* variable. The variable can then be referenced in the template.

## Import a Style Sheet

Use this element to import the contents of one style sheet into another.

An imported style sheet has lower precedence than the importing style sheet.

**XSL Syntax:** `<xsl:import href="url">`

**Publisher Tag:** `<?import:url?>`

## Define the Root Element of the Style Sheet

This and the `<xsl:stylesheet>` element are completely synonymous elements. Both are used to define the root element of the style sheet.

An included style sheet has the same precedence as the including style sheet.

**XSL Syntax:** `<xsl:stylesheet xmlns:x="url">`

**Publisher Tag:** `<?namespace:x=url?>`

The namespace must be declared in the template. See [Declare Namespaces](#).

## Format Native XSL Numbers

The native XSL `format-number` function takes a basic format.

The basic format is:

```
format-number(number,format,[decimalformat])
```

The following list describes the parameters:

- **number** - Required. Specifies the number to be formatted.
- **format** - Required. Specifies the format pattern. Use the following characters to specify the pattern:
  - **#** (Denotes a digit. Example: #####).
  - **0** (Denotes leading and following zeros. Example: 0000.00).
  - **.** (The position of the decimal point Example: ###.##).

- , (The group separator for thousands. Example: ###,###.##).
- % (Displays the number as a percentage. Example: ##%).
- ; (Pattern separator. The first pattern is used for positive numbers and the second for negative numbers).
- decimalformat - Optional. For more information on the decimal format, consult any basic XSLT manual.

## Guidelines for Designing RTF Templates for Microsoft PowerPoint Output

Publisher can generate the RTF template as PowerPoint output enabling you to get report data into key business presentations. Currently, the PowerPoint document generated is a simple export of the formatted data and charts to PowerPoint.

## Guidelines for Designing RTF Templates for Microsoft Excel Output

This section describes report features specific to designing RTF templates for Excel output (.xlsx).

It includes the following topics:

- [Create Multiple Sheets](#)
- [Specify a Sheet Name](#)
- [Specify Number and Date Formatting](#)

### Create Multiple Sheets

By default, page breaks and section breaks specified in the RTF template create a new sheet in the output Excel workbook. You can control whether page breaks create a new sheet using the property `xlsx-page-break-as-new-sheet`. Set this property to *false* when you don't want page breaks in the RTF template to generate new sheets in the Excel workbook. A section break in the template will always create a new sheet in the Excel workbook output.

For information on setting properties in an RTF template, see [Set Properties](#).

### Specify a Sheet Name

You can specify which sheet to use in an input data phrase.

To specify a sheet name, use the following command in the template:

```
<?spreadsheet-sheet-name: xpath-expression?>
```

where *xpath-expression* is an XPath expression or a string constant.

For example, assume your template uses input data as follows:

```
<?xml version="1.0" encoding="UTF-8" ?>
<ROWSET>
  <ROW>
```

```

<CUSTOMER_NAME>Vgpsuwo Fjprpit</CUSTOMER_NAME>
<CUSTOMER_NUMBER>7795</CUSTOMER_NUMBER>
<YEAR>2005</YEAR>
<BRAND>MSPKID</BRAND>
<DIVISION>UWGLERXM</DIVISION>
<STATE>LD</STATE>
<INVOICE_DATE>2004-12-07T07:13:15.379-08:00</INVOICE_DATE>
<INVOICE_NO>806356</INVOICE_NO>
<INVOICE_AMOUNT>8181.704554734346</INVOICE_AMOUNT>
</ROW>
...
</ROWSET>

```

To generate a sheet name that shows the YEAR and STATE from the data (for example, "2005 ID") enter the following in a Publisher field in your template:

```
<?spreadsheet-sheet-name: {concat(../YEAR, '-', ../STATE)}?>
```

Ensure that your expression generates unique sheet names within the workbook.

## Specify Number and Date Formatting

For the XLSX output format, Publisher doesn't apply any formatting for the number and date fields.

Publisher saves the formatting mask and the actual value (date or number) into the XLSX output file. The formatting is handled by Microsoft Excel. For example:

- If the Microsoft Windows Region and Language of the client computer is set to English (United States), then the numbers and dates are formatted in en-US locale in the XLSX output file.
- If the Microsoft Windows Region and Language of the client computer is set to French (France), then the numbers and dates in the same XLSX output file are formatted in fr-FR locale.

Note also that Microsoft Excel doesn't support some Oracle format masks. See [Use the Oracle Format Mask](#) for more information.

## Render HTML Formatted Data in a Report

This section describes how to preserve HTML formatting from a data source in your final output report.

This section contains the following topics:

- [Supported HTML Features](#)
- [Data Model Requirements](#)
- [RTF Template Requirements](#)
- [Example](#)

## Supported HTML Features

Using supported HTML features helps you format output for readability and consistency.

Supported HTML features are:

- Hyperlink
- List
  - Bulleted list
  - Ordered list
- Paragraph
- Font style (bold, italic, plain, underline, subscript, superscript, strike-through)
- Font size
- Font family
- Background color
- Foreground color
- Paragraph alignment (center, left, right, and justify)
- Paragraph indent

The following HTML features are not supported:

- Nested list (list with indent)
- Any HTML tags or attributes manually inserted by modifying the HTML source code; for example, inserted tables or images.

## Data Model Requirements

The XML data used as input to the report must wrap the HTML portion of the data in a CDATA section.

You can retrieve data stored in the form of XHTML documents stored in a database CLOB column and render the markup in the generated report.

## RTF Template Requirements

To render the HTML in your report, use the following tag in the RTF template.

The tag is:

```
<?html2fo: elementname?>
```

where *elementname* is the XML element name that contains the HTML data.

Note that when you use `html2fo` to display a string containing the '`<`' character, the output doesn't display the '`<`' character and the succeeding characters in the string because `html2fo` considers the '`<`' character as start of a tag.

## Example

This example uses the mentioned XML data with embedded HTML data.

```
<?xml version="1.0" encoding="UTF-8"?>
<RTECODE>
<![CDATA[
<p><font style="font-style: italic; font-weight: bold;" size="3">
<a href="http://www.oracle.com">oracle</a></font> </p>
```

```
<p><font size="6"><a href="http://docs.oracle.com/">Oracle Documentation</a>
</font></p>
]]>
</RTECODE>
```

To render this sample as formatted HTML a report, enter the following in your RTF template:

```
<?html2fo: RTECODE?>
```

## Embed PCL Commands for Check Printing

PCL (Printer Command Language) is a page description language. Like Postscript, it's widely supported in office printers. To support PCL printers, you can use the PDF to PCL converter. In addition to translating the PDF document into a sequence of PCL commands, specific PCL commands can be embedded in an RTF template, so that when the report output is generated in PDF and then converted to PCL the commands are maintained in the PCL file. When the PCL printer receives the PCL file, it invokes the embedded commands.

Publisher supports PCL commands to enable font selection commands for secure check printing; for example, to invoke the MICR font used for the machine-readable account codes and the custom font used for the check signer's signature. The MICR font and the custom signature font are stored in hardware cartridges on the printer and are invoked using PCL escape sequences embedded in the PCL-formatted file.

To embed the PCL commands in the file that is printed, use the Publisher commands described in this section in your RTF template in the specific position on the page where you want the PCL commands to render.

To use this feature, an administrator must also define the PCL printer in the Publisher printer setup page to use the PDF to PCL filter.

This feature is provided to support commands for font selection as described in the chapter, *PCL Font Selection of the PCL5 Printer Language Technical Reference Manual*. If you include other PCL commands (such as tray switching) in the template, the report output may produce the results desired, although these commands are not strictly supported.

## Procedure Overview

This overview discusses how to embed PCL commands in a template

To embed PCL commands in a template to be invoked by your PCL printer, perform the following:

1. Define the PCL printer in the Publisher **Administration Delivery** options.
2. Include the commands in the RTF template.
3. To generate the output, schedule or run the report selecting PDF as the output type. Select the PCL printer defined in step 1 as the destination.

## Embed PCL Commands in RTF Templates

Publisher supports custom PCL command embedding, which means that in addition to translating PDF documents into a sequence of PCL commands, Publisher supports specifying exact PCL commands to be included at a specific position on a PCL page.

To use this feature, include the following syntax in a template or data at the position where you want to print out the text.

```
<pcl><control><esc/>(pcl command)</control>(text or data field)<sp/>(text or data field)</pcl>
```

where

`<pcl></pcl>`: indicates the start and end of the custom PCL command sequence and the text to print using the custom command. If any text data appears before `<pcl>` or after `</pcl>`, it's printed as regular text using the font and font size in effect.

`<control></control>`: indicates the start and end of the PCL sequence. The data inserted after `</control>` is considered text data. The PCL command included between `<control>` and `</control>` is applied to it. Inserting any data between `<pcl>` and `<control>` is invalid and the data is ignored.

`<esc/>`: include `<esc/>` between `<control>` and `</control>` to escape character (ASCII 0x1b) in the output.

`<sp/>`: inserts a space. Include `<sp/>` in the text section (after `</control>` and before `</pcl>`) to insert a space character in the output.

The entire command and text sequence between `<pcl></pcl>` must be entered as a single line of text rendered by a single text-showing (Tj) operator in PDF. To insert a space, you must use `<sp/>` because the inclusion of an actual space in the text or data would separate the sequence into multiple text sequences in the PDF.

The following figure shows a sample check template with the command sequence:

ABC Corporation  
2000 Owens Drive  
Pleasanton CA, 94588

CHECK NUMBER

Pay to the order of PAYEE \$ AMOUNT

AMOUNT \$ Dollars

For MEMO X

<pcl><control><esc/>(70X</control>ROUTING<sp/>ACCOUNT</pcl>

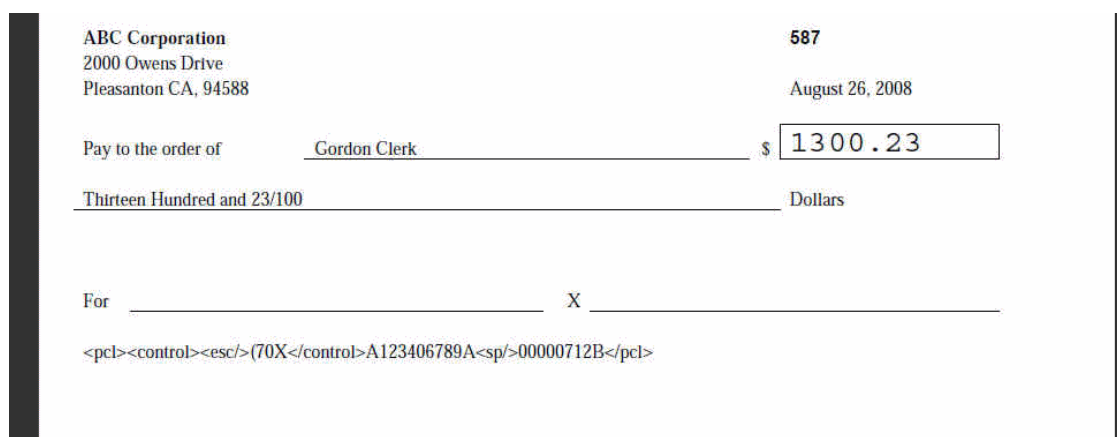
The PCL command sequence in the example is

```
<pcl><control><esc/>(70X</control>ROUTING<sp/>ACCOUNT</pcl>
```

Note that (70X is the font to substitute; ROUTING and ACCOUNT are form fields mapped to the input XML data and the `<sp/>` command is used to insert the space between the routing and account numbers.

This RTF template is merged with data and converted to PDF as shown in the following figure. The PCL command sequence is displayed as regular text.

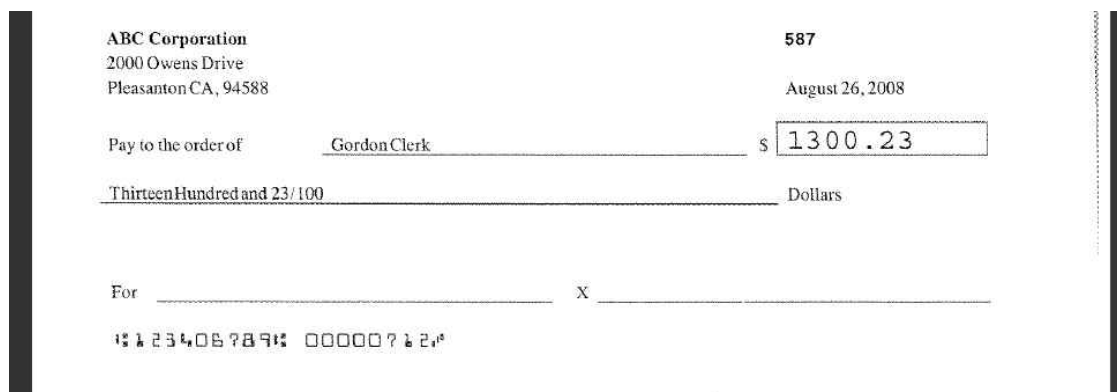
Note that you can make the font size smaller to make the line less visible, but you can't hide it.



When this PDF is converted to PCL, `<esc/>` is converted to the escape character `0x1b`; the PCL command is included from the PDF (`((70X)`; `<sp/>` is converted to a space character and the text is generated with the PCL absolute cursor positioning command (`(&a#v#h#P)`). The following figure shows the PCL output displayed using a text editor.

[illegible]

When this PCL file is sent to a printer where the MICR font with font ID 70 is installed, the printer produces the final printed output as shown in the following figure:



## Specifications and Restrictions

The PDF to PCL converter supports input of PDF files up to version 1.7 and output of PCL 5 (including HP/GL2 and PjL) and PCL 5c.

The converter supports basic text and vector/raster graphic features in PDF that are required for most business reporting and office printing.

Note the following limitations for documents processed by the PDF to PCL converter:

- SVG graphics, such as graphs, aren't supported.
- Embedded objects (such as Flash objects) and file attachments aren't supported.
- Use of Adobe core dingbats and symbol font isn't supported. Use TrueType fonts to print dingbats and symbols and embed the font when generating PDF.
- Supports printing of the generated output on any printer that supports PCL 5/PCL 5c standard. However, the display of the generated output using PCL viewer applications or any software that re-processes PCL for other than direct printing purposes isn't supported.
- The PDF to PCL converter supports, with limitations, the conversion of PDF documents generated by the FO processor. Other PDFs, such as PDF files processed with FormProcessor or PDF documents generated by external applications may produce the printed results desired, but aren't strictly supported.
- The PDF to PCL converter supports the conversion of PDF documents generated by the PDFBookBinder and PDFDocMerger utilities so far as all the PDF documents used for generating the output are originally generated by the FOPProcessor and the documents don't include restricted features.



# Create RTF Templates Using the Template Builder for Word

This topic describes creating RTF templates using the Template Builder for Word add-in.

## Topics:

- [Overview](#)
- [Get Started Using the Template Builder](#)
- [Access Data for Building Templates](#)
- [Insert Components to the Template](#)
- [Preview a Template](#)
- [Template Editing Tools](#)
- [Upload a Template to Publisher](#)
- [Use the Template Builder Translation Tools](#)
- [Set Options for the Template Builder](#)
- [Set Up a Configuration File](#)
- [Publisher Menu Reference](#)

## Overview

The Template Builder is an add-in to Microsoft Word that simplifies the development of RTF templates.

Although you don't need Template Builder to create RTF templates, it provides many functions that increase productivity.

The Template Builder is tightly integrated with Microsoft Word and enables you to perform the following functions:

- Insert data fields
- Insert tables
- Insert forms
- Insert charts
- Preview the template with sample XML data
- Browse and update the content of form fields
- Extract boilerplate text into an XLIFF translation file and test translations

The Template Builder automates insertion of the most frequently used components of an RTF template. RTF templates also support much more complex formatting and processing.

## Before You Get Started

The Template Builder installation provides samples and demo files to help you get started.

The demos can be accessed from the Windows Start menu as follows:

Select **Start, Programs**, Oracle Analytics Publisher Desktop, and **Demos**.

You can also access the demos from the Publisher Desktop\demos folder where you installed Oracle Analytics Publisher Desktop (for example: C:\Program Files\Oracle\Publisher\Publisher Desktop\demos).

The following demos are provided:

- TemplateBuilderDemo.exe - Demonstrates building a report layout using many key features of the Template Builder, including: connecting to the Publisher server, loading data for a report, inserting tables and charts, and defining conditional formatting.
- TemplateBuilderInvoice.exe - Demonstrates how to take a prepared layout and use the Template Builder to insert the required fields to fill the template with data at runtime.
- LocalizationDemo.exe - Demonstrates the localization capabilities of the Template Builder and shows you how to extract an XLIFF file from the base RTF template. The XLIFF file can then be translated and the translations previewed in the Template Builder.

The sample files are located in the Publisher Desktop\Samples folder. The Samples folder contains the subfolders:

- eText templates
- Excel templates
- PDF templates
- RTF templates

The eText, PDF, and Excel template samples can be used as references to create these types of templates. The Template Builder is only available for the RTF templates. The RTF templates folder contains eight subfolders to provide samples of different types of reports. Refer to the TrainingGuide.html located in the RTF templates folder for additional information on what is contained in each sample.

## Prerequisites and Limitations

Certain prerequisites and limitations apply to this feature.

### Prerequisites

- The report data model created and running successfully.
- Supported versions of Microsoft Word and Microsoft Windows are installed on the client.
- The Publisher Template Builder downloaded and installed on the client.

The Template Builder can be downloaded from the Home page.

### Limitations

The Template Builder doesn't support bidirectional display of text in the user interface.

## Get Started Using the Template Builder

This section describes how to get started with creating RTF templates using the Template Builder for Word.

It contains the following topics:

- [Features of the Publisher Template Builder for Word](#)
- [Build and Upload a Template](#)
- [Work in Connected Mode](#)

## Features of the Publisher Template Builder for Word

When you open Microsoft Word after installing the Template Builder, you see the Publisher menu. Using this you can perform different tasks.

For Microsoft Word users, the Publisher commands are displayed in the ribbon format.

Use the menu (or toolbar) to perform the following:

- Insert data fields into age RTF templates
- Insert tables, forms, charts, and pivot tables
- Preview the template in multiple outputs
- Browse and update the content of form fields
- Validate the template
- Perform calculations on fields within the template
- Connect to the Publisher catalog to retrieve data to build the template
- Upload the template to the Publisher server
- Extract boilerplate text into an XLIFF translation file and test translations

## Build and Upload a Template

You can build and upload the template using a direct connection with the Publisher server, or you can build and upload the template in disconnected mode.

## Work in Connected Mode

Connected mode allows you to make changes directly on the Publisher server.

To work in connected mode:

1. Open Microsoft Word.
2. From the Publisher menu, select **Log On**.
3. Enter your Publisher credentials and the URL for the Publisher server, for example: `http://www.example.com:7001/xmlpserver`. (Contact your system administrator if you do not know the URL.)
4. The Open Template dialog presents the same folder structure as the Publisher catalog. Select the report or data model for which you want to build a template.
5. If you selected a data model:

Click **Create Report** to create a report for this data model in the Publisher catalog. This is the report that you upload the template to.

Enter a Report Name and select the folder in which to save it.

Click **Save**.

The sample data from the data model is loaded to the Template Builder.

If you selected a report:

Click **Open Report** to load the data to the Template Builder; or double-click **New** in the Layout Templates pane.

Any existing templates are listed in the **Layout Templates** pane.

6. Follow the guidelines in this chapter to insert data fields and design the template using features such as tables, charts, and graphics. Use Microsoft Word to apply formatting to fonts and other objects in the template.
7. To upload the template file to the Publisher server and add it to the report definition, select **Upload Template As** from the Publisher menu.

If you haven't saved the template, then you are prompted to save it in Rich Text Format.

8. Enter a name and select a locale in the **Upload as New** dialog. This is the name that is displayed under **Layouts** in the Report Editor. This is also the layout name that is displayed when a user runs this report.
9. Configure properties for this layout.

Navigate to the Publisher report editor to configure properties for this layout, such as output formats.

## Work in Disconnected Mode

To work in disconnected mode, you must have a sample data file available in the local work environment.

To work in disconnected mode:

1. Save a sample data file to your local computer.
2. Open Microsoft Word with the Template Builder installed.
3. On the Publisher menu in the **Load Data** group select **Sample XML**. Locate the sample data file in the local directory and click **Open**. The Template Builder also supports using XML Schema to design an RTF template. However, because the schema contains no data, the preview of the report also contains no data.
4. Follow the guidelines in this chapter to insert data fields and design the template using features such as tables, charts, graphics, and other layout components. Use Microsoft Word to apply formatting to fonts and other objects in the template.
5. Upload the layout template file.

In the catalog, open the report in the Report Editor. Click **Add New Layout**.

Complete the fields in the dialog and then select **Upload**. The template now appears as a layout for the report.

6. Configure properties for this layout.

## Access Data for Building Templates

The data model defines the XML format that is merged with the RTF template. The Template Builder requires sample data to build the template. You must load sample data to use most of the template builder functionality.

If you are not connected to Publisher, then use the procedure in [Load XML Data from a Local File](#). If you are connected, then use the procedure in [Load Data from the Publisher Catalog](#).

### Load XML Data from a Local File

One method of loading data to the Template Builder is to save a sample of the report data to a local directory.

If you do not have access to the report data model, but you can access the report, then you can alternatively save sample data from the report viewer.

To save data from the report viewer:

1. In the Publisher catalog, navigate to the report.
2. Click **Open** to run the report in the report viewer.
3. Click the **Actions** icon, then click **Export**, then click **Data**. You are prompted to save the XML file.
4. Save the file to a local directory.
5. Use the **Load Sample XML** feature below to load the saved XML file to the Template Builder.

The **Load Data** group from the Publisher menu enables you to select and load the saved XML file to the Template Builder.

- **Sample XML** - Enables you to load a sample XML file that contains all fields that you want to insert into the template as a data source. If you are not connected to the Publisher, then use this method to load the data.
- **XML Schema** - Enables you to load an XML Schema file (.xsd) that contains the fields available in the report XML data. The XML schema has the advantage of being complete (a sample XML file might not contain all the fields from the data source). For the preview, the Template Builder can generate dummy sample data for an XML Schema. However, the preview works better if you also upload real sample data.

### Load Data from the Publisher Catalog

You can connect directly to Publisher to load the Publisher report data to the Template Builder to use as sample data for designing layouts.

You can also download an existing template to modify it.

To connect to Publisher and load a data source:

1. Log in to Publisher: From the Publisher menu, select **Log On**.
2. After you are logged on, you can select **Open**. The Open Template dialog launches.
3. Navigate to the folder that contains the report or data model for which you want to create a template.

When you select a report, you can either select from the **Layout Templates** to open an existing template, select **Open Report** to load just the XML sample data to create a new layout, or double-click **<New>** to load the data to the Template Builder to build a new layout.

When you select a data model, you are prompted to create a report in the catalog.

## Insert Components to the Template

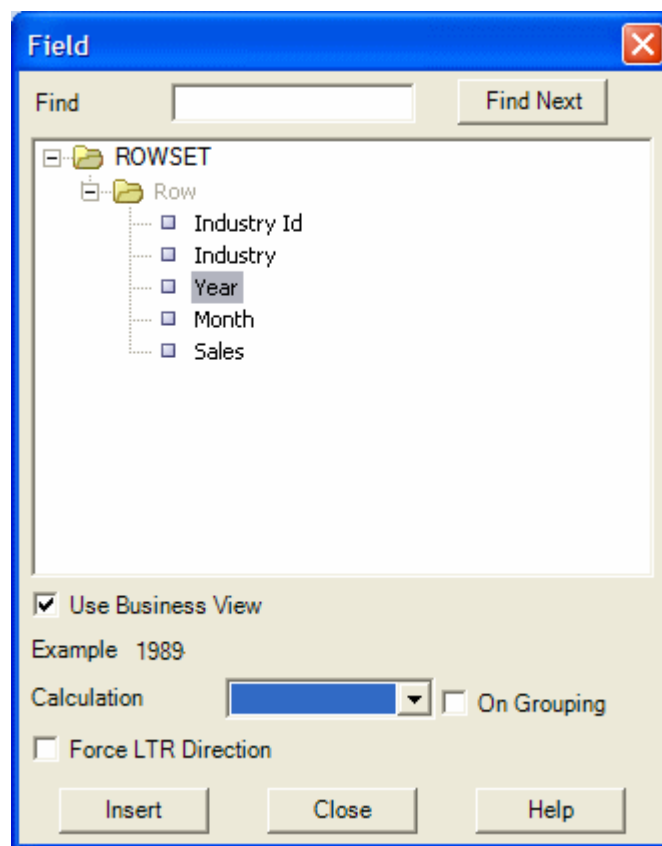
This section includes topics that give more information on inserting components to the template.

- [Insert a Field](#)
- [Insert a Table Using the Table Wizard](#)
- [Insert a Table or Form Using the Insert Table/Form Dialog](#)
- [Insert a Chart](#)
- [Insert a Repeating Group](#)
- [Create Grouping Fields Around an Existing Block](#)
- [Insert a Pivot Table](#)
- [Manually Edit a Pivot Table](#)
- [Insert and Edit Conditional Regions](#)
- [Insert Conditional Formatting](#)

### Insert a Field

This dialog enables you to select data elements from the data source and insert them into the template.

In the Insert group select **Field** to open the Field dialog. The dialog shows the structure of the loaded data source in a tree view, as shown in the following figure:



Select a field that represents a single data field (a leaf node of the tree) and select **Insert** (you can also insert the field by dragging and dropping it into the document, or by double-clicking the field). A text form field with hidden Publisher commands is inserted at the cursor position in the template. You may either select and insert additional data fields or close the dialog by clicking the **Close** button.

## About the Insert Field Dialog

The fields in the Field dialog are explained in these sections.

The **Insert Field** dialog fields are described in the following sections:

### Find

For an XML document with a large and complicated structure, use the find functionality to find a specific field. Enter a partial string of the field name you are searching into the **Find** field and click **Find Next**.

The next occurrence of a data element that includes the search expression is selected. Click the **Find Next** button again to see the next occurrence.

### Example

When you select a field name in the tree view, an example value for this field is shown.

## Force LTR (Left-to-Right) Direction

**Force LTR Direction** check box is only needed if you are using the template in a language that prints the characters from right to left, such as Arabic or Hebrew.

Use this feature to force left-to-right printing for fields such as phone numbers, addresses, postal codes, or bank account numbers.

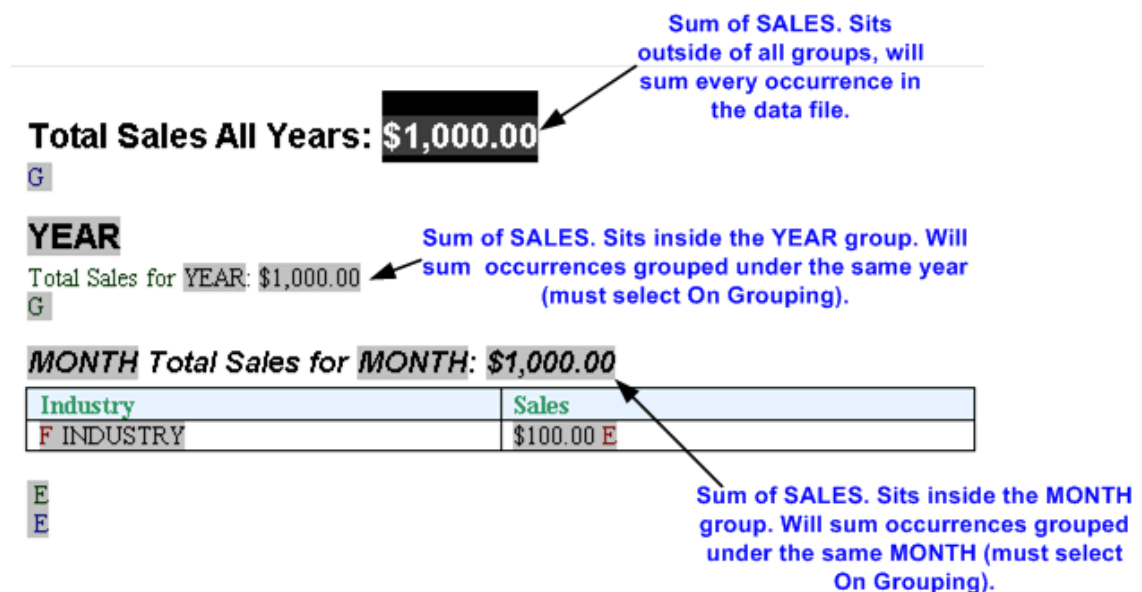
## Calculation

Calculation feature enables you to perform aggregation functions on data fields, such as sum, average, count, minimum, and maximum.

For example, if you select sum for a data field, then the field shows the sum of all occurring values for this data field, depending on the grouping.

It's important to understand the grouping context (marked by **G** and **E** form fields) to know exactly which fields are accumulated. If you insert a data field with an accumulation function into a repeating section (marked by **G** and **E** processing instruction form fields), you must select **On Grouping** to accumulate the data for the occurrences within the group. If you do not want the accumulation to be restricted to the group, you must place the accumulation field outside the group.

The following figure shows a grouping context example:



Also note that the data field must be a valid XSL number for the accumulation functions to work. Formatted numbers cannot be processed by Publisher (for example a number using a thousands separator: 10,000,000.00 cannot be processed).

For more information on groups in a template using the Template Builder, see [Insert a Repeating Group](#) and [Define Groups](#).



## Insert a Table Using the Table Wizard

The **Insert Table Wizard** enables you to create standard reports. On the **Insert** menu select **Table Wizard** and complete these steps.

- [Step 1: Select Report Format](#)
- [Step 2: Select Table Data](#)
- [Step 3: Select Data Fields](#)
- [Step 4: Group the Table](#)
- [Step 5: Insert a Break for the Group](#)
- [Step 6: Sort the Table](#)
- [Step 7: Click Finish](#)
- [Step 8: Customize the Table Using Microsoft Word Functionality](#)

### Step 1: Select Report Format

Start by selecting the basic report format.

Choose from **Table**, **Form**, or **Free Form**. The following illustration shows examples of each format.

Table

Last Name	First Name	Phone
Doe	John	(123) 456-7890

Form

Last Name	John
First	Doe
Phone	(123) 456-7890

Freeform

John

Doe

(123) 456-7890

### Step 2: Select Table Data

An XML document can include multiple grouped datasets.

For example, a purchase order XML document may contain header level information, lines, shipments and contacts.

In this step, select the data group that contains the data that is required for the table.

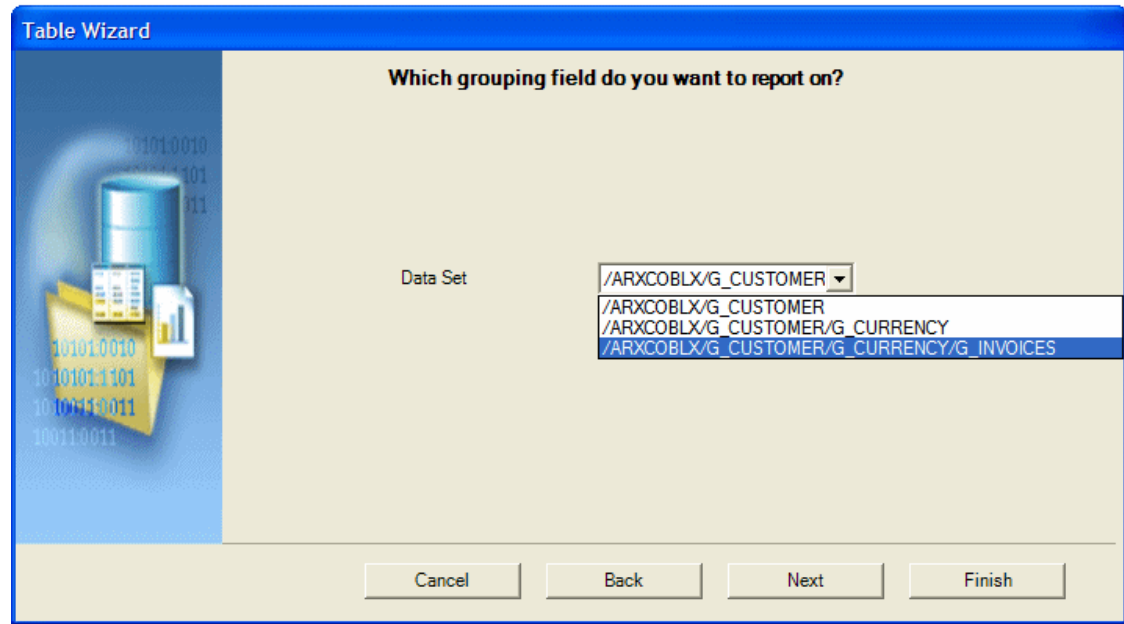
For example, in the Balance Letter sample RTF template (found in the Template Builder installed files under Oracle\Oracle Analytics Publisher\Oracle Analytics Publisher Desktop\samples\RTF Templates), the sample XML file contains three data groups as follows:

- ARXCOBLX/G\_CUSTOMER

- ARXCOBLX/G\_CUSTOMER/G\_CURRENCY
- ARXCOBLX/G\_CUSTOMER/G\_CURRENCY/G\_INVOICES

The Table Wizard presents a list of the available data groups in the XML data file. Select the group that contains the data fields for the table.

The following illustration shows the Table Wizard Step 2: Selecting Table Data.



To build a table to list the invoices contained in the data, select:

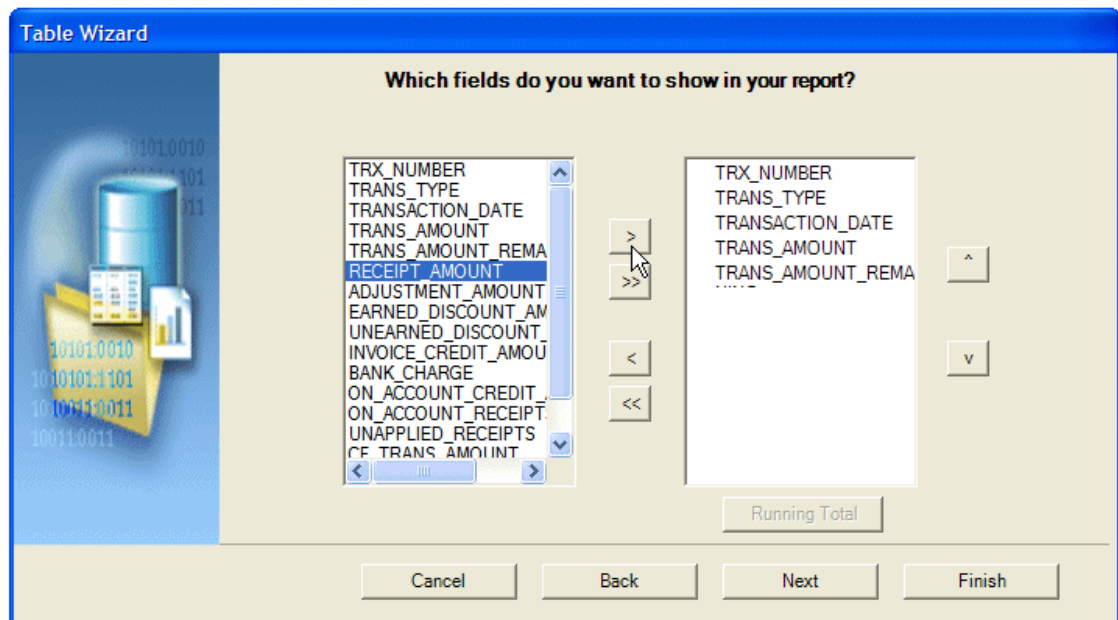
ARXCOBLX/G\_CUSTOMER/G\_CURRENCY/G\_INVOICES

as the dataset.

### Step 3: Select Data Fields

The Table Wizard presents the data fields from the selected dataset.

The following illustration shows the Table Wizard Step 3: Selecting Data Fields.



Use the shuttle buttons to select the data fields to show in the table. Use the up and down arrows to reorder the fields after selecting them.

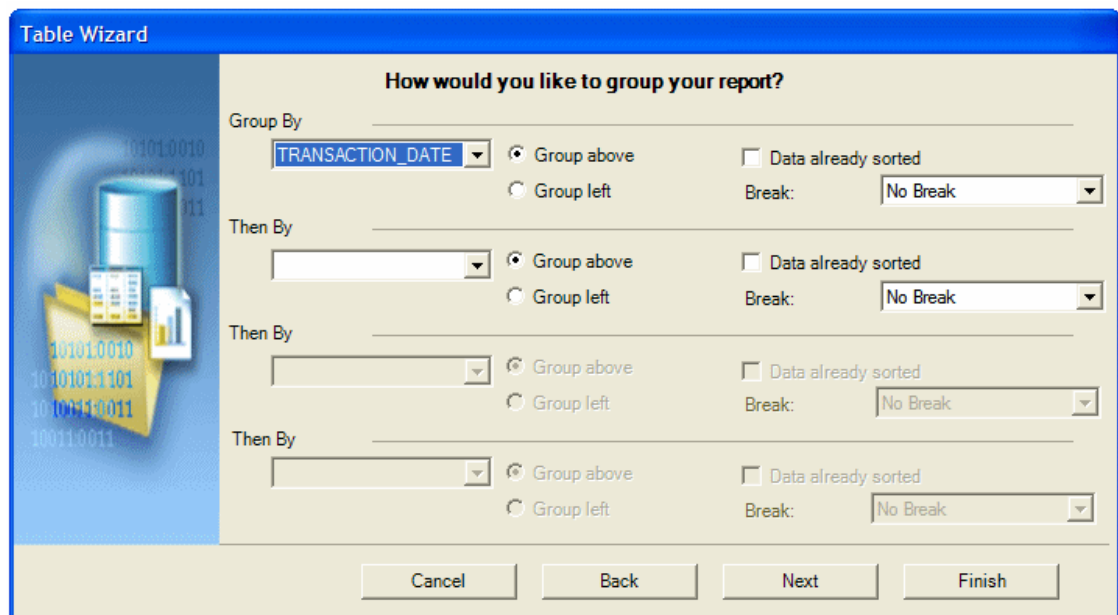
## Step 4: Group the Table

This step enables you to regroup the data by a particular field.

This is optional.

For example, if you are building a table of invoices, you may want to group all invoices of a particular type or date to be grouped together in the report.

The following illustration shows the Table Wizard Step 4: Grouping the Table.



There're two options for grouping: Group Left or Group Above. Group Left creates a nested table. The Group By field displays to the left in the outer table. Group Above creates a new table for each new value of the group by field, displaying the value of the group by field as a table title.

Examples follow:

**Group Left** groups the group by element occurrences together, as shown in the following illustration.

Date	Invoice	Amount	Amount Remaining
02-DEC-07	234	53.35	53.35
04-DEC-07	10020402	146776.07	146776.07
	10020403	172482.45	172482.45
	10020404	147740.25	147740.25
	10020405	71577.42	71577.42
	10020406	89344.81	89344.81
	10020407	223563.03	223563.03
	10020408	176353.55	176353.55
05-DEC-07	10020487	112902.54	112902.54
06-DEC-07	502444	19125	19125
	502445	12375	12375

**Group Above** shows the result as a table with a header, as shown in the following illustration.

### Grouping Field 1

Header 1	Header 2	Header 3	Header 4	Header 5
Data 1	Data 2	Data 3	Data 4	Data 5

Example of Group Above:

#### 02-DEC-03

Invoice	Amount	Amount Remaining
234	53.35	53.35

#### 04-DEC-03

Invoice	Amount	Amount Remaining
10020402	146776.07	146776.07
10020403	172482.45	172482.45
10020404	147740.25	147740.25
10020405	71577.42	71577.42
10020406	89344.81	89344.81
10020407	223563.03	223563.03
10020408	176353.55	176353.55

When you select an element to group by, Publisher sorts the data by the grouping element. If the data is already sorted by the grouping element, then select the **Data already sorted** check box. This selection improves performance.

## Step 5: Insert a Break for the Group

Use the **Break** option to insert either a **Page** break or **Section** break after each occurrence of this group.

Note that a **Section** break can only be created on the top-level group. The subsequent grouping options only display the **Page** break option.

A page break starts the next group on a new page; a section break starts the next group on a new page, reset page numbering, reset headers and footers, and reset any running calculations for each occurrence of the group.

## Step 6: Sort the Table

You can sort the data in the table by up to four different fields.

Select a field and then define the sorting order (ascending or descending), and select the correct data type for the field. For example, if text is selected, "12" comes before "2" (alphanumerical order). If number is selected, "2" comes before "12".

The following illustration shows the Table Wizard Step 6: Sorting the Table.

The screenshot shows the 'Table Wizard' dialog box, specifically the 'Which fields would you like to use to sort the data?' step. The dialog has a blue title bar and a light beige background. On the left, there is a graphic of a blue cylinder (database) and a yellow folder with a document icon, surrounded by binary code. The main area contains four rows for sorting, each with a 'Sort By' dropdown, a radio button for 'Ascending' or 'Descending', and radio buttons for 'Date/Text' or 'Number'. The first row has 'TRX\_NUMBER' selected in the dropdown, 'Ascending' selected, and 'Date/Text' selected. The other three rows have empty dropdowns and 'Ascending' and 'Date/Text' selected. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Finish'.

## Step 7: Click Finish

Click **Finish** to create the table and insert it to the Microsoft Word document.

## Step 8: Customize the Table Using Microsoft Word Functionality

Customize the table by changing fonts, colors, column sizing, borders, shading, and so on, using Microsoft Word formatting commands.

## Insert a Table or Form Using the Insert Table/Form Dialog

The Insert Table/Form dialog is the most flexible tool of the template builder. It allows you to perform these tasks.

- Create a simple or nested table with a variable number of rows.
- Associate a group of data elements, such as a complete invoice or a purchase order line, with a form in the document that is repeated for each occurrence of the data element.
- Select and define a layout for all the data fields in the template.
- Group or re-group the data.

The Insert Table/Form dialog shows you two tree view panes. The left pane shows the data source structure, while the right pane shows the elements that are copied to the template when you click the **Insert** button.

## Select Data Fields

First select the data fields to insert in the template and then define how to format them.

Drag an XML element from the left Data Source pane to the right Template pane. If the XML element has children, you see a pop-up menu with the following options:

- Drop Single Node
- Drop All Nodes
- Cancel

Select **Drop Single Node** if you want to move only the selected node or **Drop All Nodes** if you want to move the node and all its children.

If you drag an additional data field from the left Data Source pane to the right Template pane, it's either inserted at the same level (Same Level) or below the node (Child) where you release the node. The Insert Position box defines where the node is inserted.

If you use the left mouse button for drag and drop, then the node and all children are copied. However, if you use the right mouse button for dragging, a dialog is displayed when you release the mouse button. The dialog gives you the option to copy either only the selected node or the selected node and all children.

## Define the Layout

When you select an element in the right Template pane, you see its properties as well as a preview of how the node is rendered.

There're two kinds of nodes:

- Data Fields
- Data Groups

Data Field nodes (leaf nodes) do not have any child nodes. They represent simple attributes such as the total amount for an invoice or the subtotal for a purchase order line.

Data Group nodes (parent nodes) are nodes that do have child nodes. Typically, they don't represent data attributes, but groups of data - such as an invoice, a purchase order, a purchase order line, or a shipment.

## Data Field Properties

If a Data Field node is selected, its properties are shown in the **Properties** pane. Use these options to describe how the Template Builder should display the field.

- **Calculation**

You can select one of the aggregation functions for the data fields. These functions (besides count) only have an effect when there's more than one of the data fields in the context where you use the function.

- **Force LTR (Left-to-Right) Direction**

This option is only needed if you are using the template in a language that displays characters from right to left, such as Arabic or Hebrew. Use this option to force left-to-right printing for fields such as phone numbers, addresses, postal codes, or bank account numbers.

## Data Group Properties

The order in which the data elements are shown reflects the order of the columns in the table. If you want to reorder the columns, change the Insert Position box from Child to Same Level. Then drag the elements into the correct order.

If a Data Group node is selected, its properties are shown in the **Properties** pane. Use these options to describe how the Template Builder should render the group:

- **Style**

To display the data as a horizontal table with a header, select Table. To display the fields below each other with labels in a table, use Form. If you want to insert the fields into a free-form text section that should be repeated for this element, select Free Form.

- **Grouping**

Grouping is an advanced operation that allows you to group the data by a specific element in the data. For example, you might want to group all invoices by customer. You can select a child element of the selected element as a grouping criterion. See [Group Nodes](#).

- **Show Grouping Value**

This property is shown only if you selected a node created by the Grouping functionality. By default, the field you've selected to group the data by is displayed in the report. If you don't want the grouping data field displayed, then select No.

- **Sort By**

Select an element by which the data groups are sorted.

- **Sort Order**

If you selected an element for Sort By you can select if the data should be sorted either ascending or descending.

- **Sort Data Type**

If you selected an element for Sort By the data is by default sorted as text. That means that 12 is shown after 111. If the data is numeric, select Number as the sort data type.

- **Break**

This property allows you to insert a page break or a section break between every data group. If you select New Page per Element, then a page break is inserted between each element after the first occurrence.

✓ **Tip**

To insert a page break before the first occurrence of an element, use Microsoft Word's page break command.

If you select New Section per Element, then a section break is created for each data group. A section break has the following effects: it inserts page break, it resets the page numbers and new data can be displayed in the header and footer. You typically use this option to print multiple documents (for example invoices or purchase orders) to a single PDF file.

## Insert Tables and Forms

Once you've dragged all data fields over and defined the layout, select the Insert button to place the tables and forms at the cursor position in the document.

## Group Nodes

You can group any Data Group node by any of its child Data Field Nodes. For example if you've sales data for multiple quarters, you may want to show the sales data organized by quarter. In this case you would group the sales data rows by the quarter element.

Assume the following structure:

```
Sales Transaction
  Quarter
  Customer
  Amount
```

To group the child nodes of a node (Sales Transaction), you select one of the child nodes (Quarter) as the grouping property of the parent node (Sales Transaction). The Template Builder makes this node (e.g. quarter) the parent of the other child nodes (Customer and Amount).

The new structure looks like the following:

```
Sales Transaction
  Quarter
    Customer
    Amount
```

The grouping criterion (Quarter) now behaves like any other Data Group Node with children. That means that you can define the layout of its children using the Create As Table, Style, Label, Grouping, and Show Grouping Value properties.



## Understand the Fields Inserted to the Template

There're distinct differences between the types of fields in templates.

The Insert Table/Form Dialog creates two kinds of form fields:

- Form fields representing data elements.
- Form fields with processing instructions for repeating table rows or document sections.

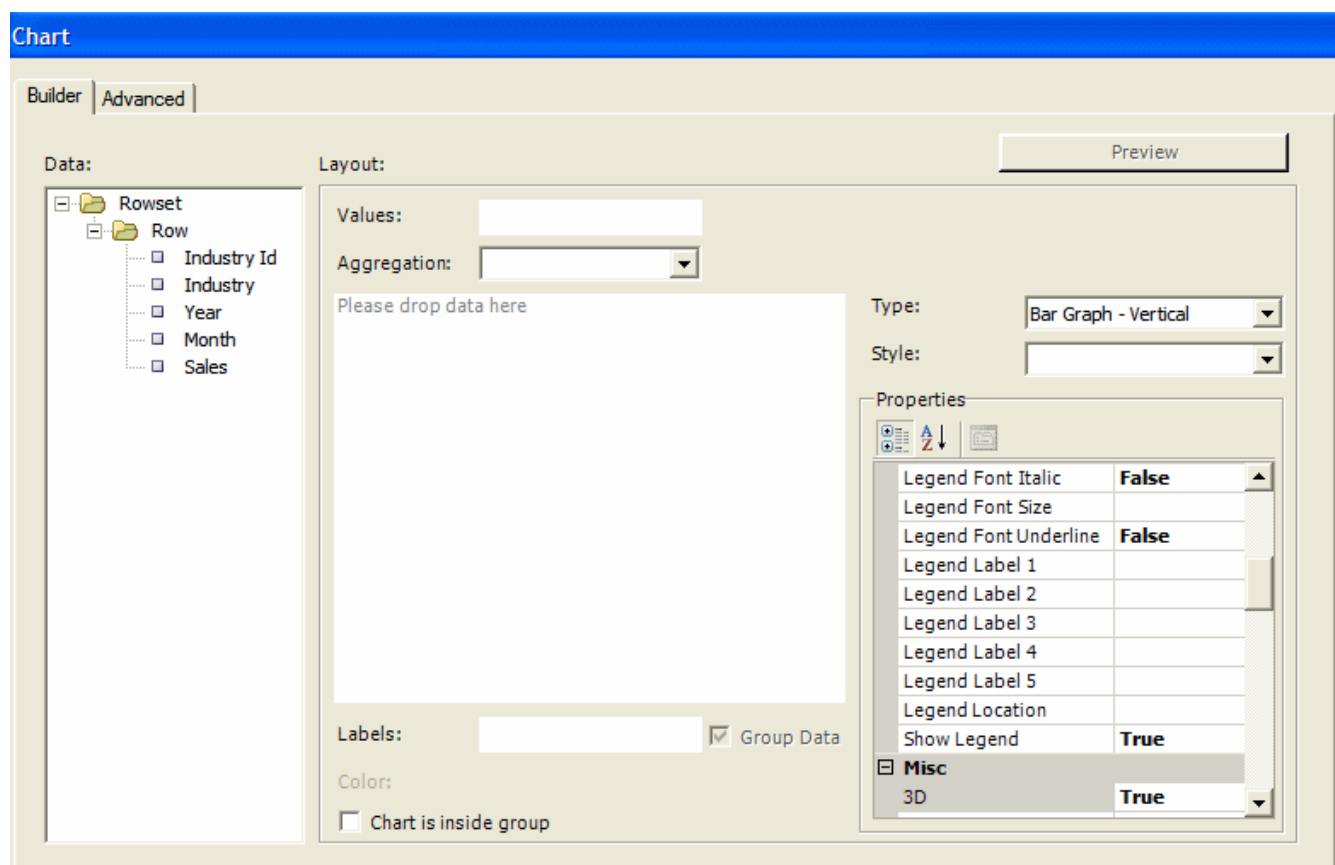
Form fields representing data elements are replaced with the data when the template is processed. Form fields indicating repeating sections are shown as **for-each** and **end for-each** in the document.

If you have selected the Abbreviated form field display option, then the for-each and end for-each form fields are displayed as **F** and **E**. The section of the document encapsulated by these two elements is repeated, if the associated data element is repeated in the data.

## Insert a Chart

Use the Chart dialog to insert a chart into a template.

The following figure shows the Chart dialog.



## Chart Type

Publisher supports a large variety of chart types. Expand the **Type** list to select the chart type for this template.

## Values

Drag and drop the data value you want to measure to the Values field (for example, SALES).

You can select multiple Value elements (measures).

The **Values** field changes depending on the Chart Type that you select:

- Combination Graph - Enables three fields for the Value selections.
- Scatter Graph - Compares pairs of values. Drag and drop the X and Y data elements to compare.
- Bubble Graph - Compares sets of three values. Similar to the scatter graph, the third value is displayed as the size of the bubble.
- Stock Graph - Drag and drop the elements that represent the Open, High, Low, Close, and Volume values for the stock graph.

## Aggregation

Use the **Aggregation** option in the **Properties** pane to do functions such as sum, count, and average.

You can choose to aggregate the Values data as a sum, a count, or an average.

## Labels

Drag and drop the data element for which you want to see the Value charted (for example, Year).

Select Group Data to group the occurrences of the label element before rendering it in the chart. For example, if you are charting Sales by Year, then selecting Group Data accumulates the values for Year, so that only one occurrence of each year is displayed in the chart. If you do not select Group Data, then the value for every occurrence of Year in the data is plotted separately.

## Color

If you want to add a series element to the chart, then drag and drop the element to display as a series. Each value is displayed as a new color in the graph.

## Chart is Inside Group

Select this box if the chart is inside a grouping and you want the chart to display data only for the occurrences of the data elements within the group.

## Style

Select a color scheme and style for the chart.

## Properties

The properties region enables you to change value and label display names, select color, font, and other display options for the chart.

The properties list changes depending on the chart selection.

## Preview

Click **Preview** to display the chart with the sample data.

## Group Data

By default the data is grouped by the Value element and aggregated by sum.

If you deselect the **Group Data** check box, then each occurrence of the value element is charted and aggregation functions are not available.

## Edit an Inserted Chart

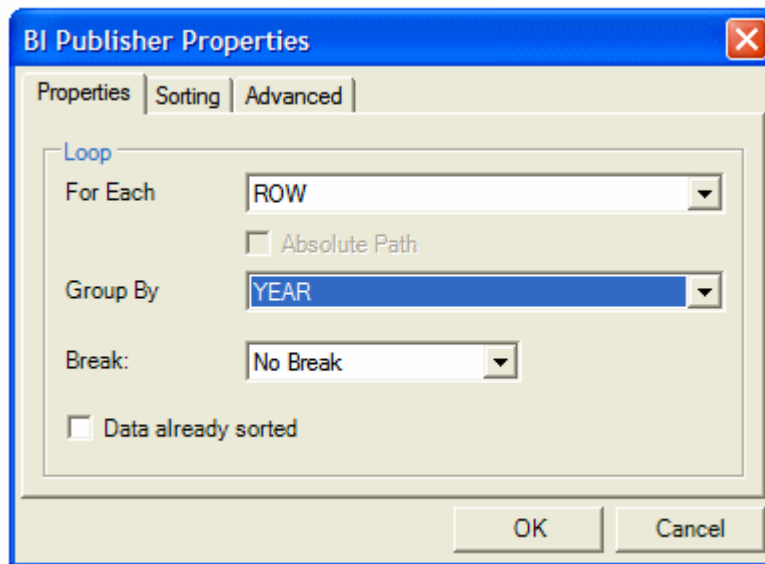
To edit a chart that you've already inserted into the template, right-click the chart and select Publisher Chart from the menu. This invokes the chart dialog to enable you to edit the chart.

## Insert a Repeating Group

Follow these steps to insert a repeating group.

To insert a repeating group:

1. Select the section of the template that contains the elements you want repeated.
2. On the Publisher menu, in the Insert group, click **Repeating Group**.
3. Enter the appropriate fields in the Publisher Properties dialog, as shown in the following figure:



### For Each

Select the element that for each occurrence, you want the loop to repeat. When you select the For Each data field you are telling Publisher that for each occurrence of the selected field in the data you want the elements and processing instructions contained within the loop to be repeated.

For example, assume that the data contains invoice data for customers and you want to create a table with each customer's invoices. In this case, for each customer number you want the table to repeat. You would therefore select the customer number in the For Each field to create a new loop (or group) for each customer.

Note the following about creating repeating groups:

- For loops and groupings not inside another group (that is, outer groups or loops) you must select the repeating XML element to be used. For example if the dataset is flat, the only repeatable element is /DATA/ROWSET/ROW. In cases with multiple data sources or hierarchical XML you can choose the dataset.
- If you are creating nested groups (inserting a loop or group inside of another loop in the template), the **For Each** field isn't updatable because it's already defined by the preexisting outer loop. The **For Each** field is displayed as Group Item to inform you that an outer group is already defined.

### Absolute Path

Select this check box to use the Absolute Path to the element in the XML structure. This is important if the data contains the same element name grouped under different parent elements.

### Group By

Select a field from the list by which you want to group the data. If you just want to create a simple loop, do not select a group by element. Selecting a group by element actually regroups the data into a new hierarchy based on the group by element.

### Break

Use this option to create either a Page break or Section break if you want to insert a break after each occurrence of this group.

A Section break can only be created on outer groups that surround the whole document. If the selected field isn't an outer group, the Section break option isn't available.

Note also that when you insert a section break, the page numbering is reset, headers and footers are reset, and any running calculations are reset for each occurrence of the group.

4. To sort the grouped data, select the **Sorting** tab. You can select up to four sort-by fields. For each sort by field, select the following:

Sort order - Select Ascending or Descending.

Data Type - Select Number or Date/Text. It's important that you select the correct data type to achieve the expected sort order.

If you are sorting by four criteria and the XML data element names are long, then you might exceed the character length limitation (393 characters) of the Microsoft Word form field.

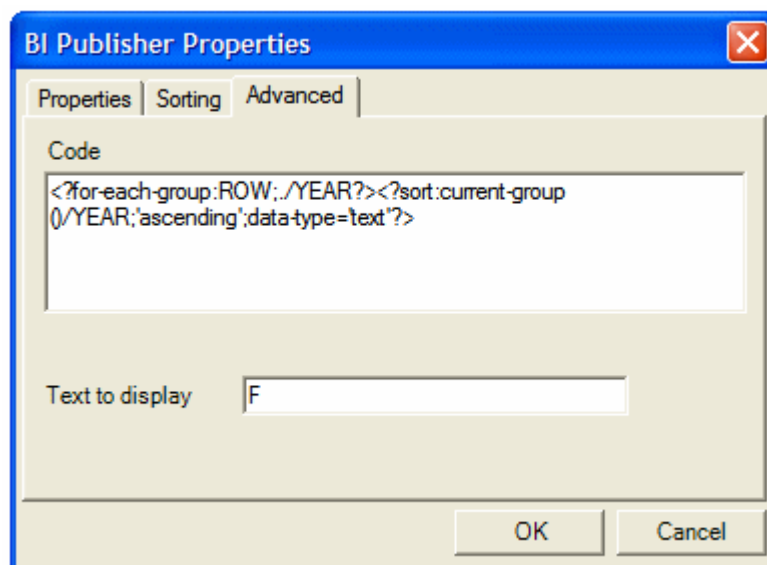
5. The **Advanced** tab enables you to edit the code directly and to enter **Text to display** for the field.

The Code region displays the code and processing instructions that the Template Builder has inserted for the field. You can edit this if you want to change the processing instructions for this field.

The **Text to display** field shows how this field displays in the template. You can choose to enter descriptive text to enable you to understand each field better when reading the template, or you can enter abbreviated text entries that are less intrusive to the look and feel of the template.

You can set the default display text as Descriptive or Abbreviated using the **Options** tab.

The following figure shows the **Advanced** tab of the Publisher Properties dialog.



6. When you've completed the dialog options, click **OK**. This inserts the form fields in the template. By default, the beginning for-each form field displays the text "F" and is inserted at the beginning of the selected template section. At the end of the selection, an "E" form field is inserted to denote the end of the repeating group.

## Create Grouping Fields Around an Existing Block

Follow these steps to create a group around an existing block of text or elements in a template.

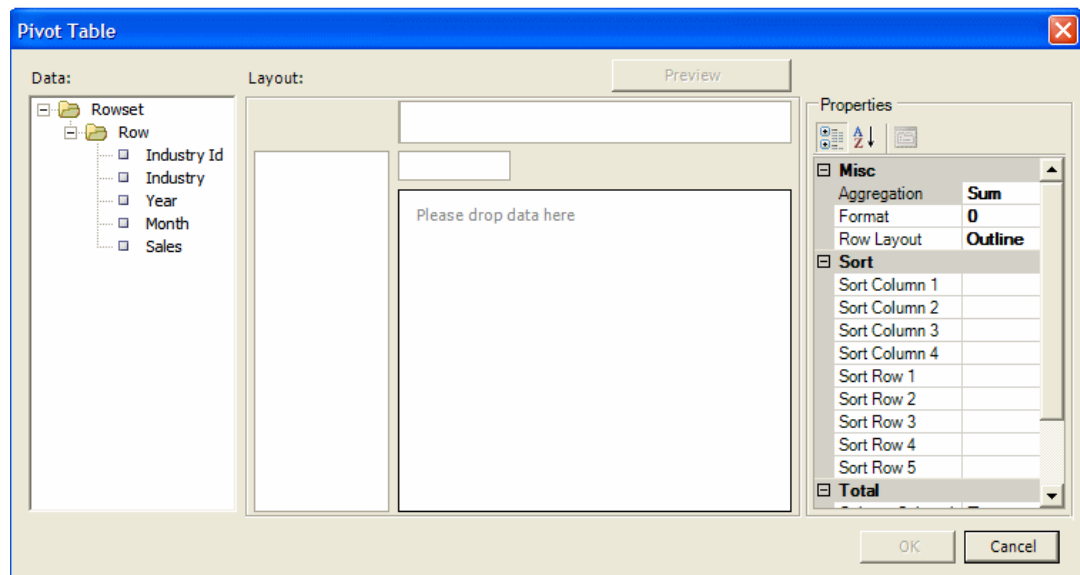
1. Select the block of text. For example, a table row.  
If any preexisting Publisher tags are included in the block, then you must include the beginning and ending tags. For example, if the block contains any opening for-each, if, or for-each-group tags, then you must include the end for-each, end-if, and end for-each-group tags in the selection.
2. On the Publisher menu, on the Insert group, click **Repeating Group**.
3. In the Properties dialog, enter the fields to define the repeating group.
4. Click **OK** to insert the grouping fields around the block. For example, if the block is a table row, then the begin field is inserted at the beginning of the first cell and the end field is inserted at the end of the last field.

## Insert a Pivot Table

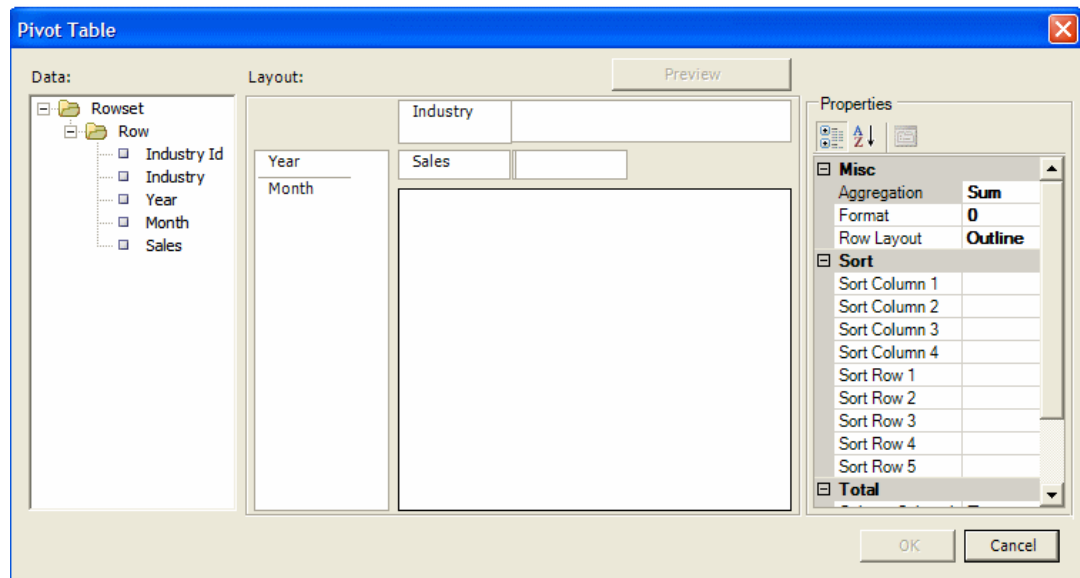
Follow these steps to insert a pivot table.

To insert a pivot table:

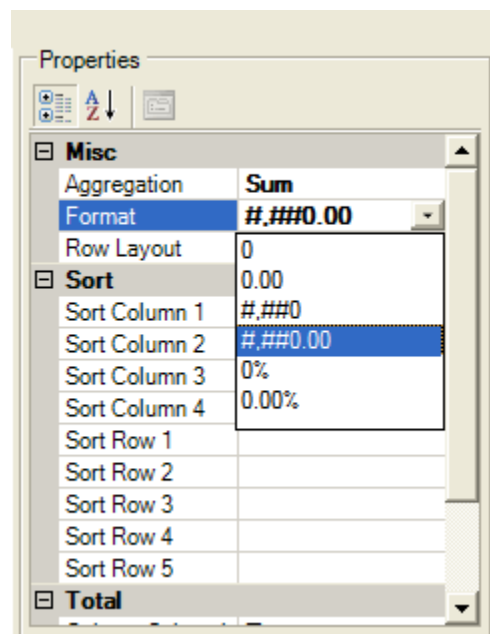
1. On the Publisher menu on the **Insert** group, click **Pivot Table**. The Pivot Table dialog presents the data in the left pane with empty Layout panes on the right for you to drag and drop data elements. The following figure shows the Pivot Table dialog.



2. Drag and drop the elements from the Data pane to the Layout pane to build the pivot table structure. In the following figure, the layout shows Sales by Industry accumulated by Year and by Month:

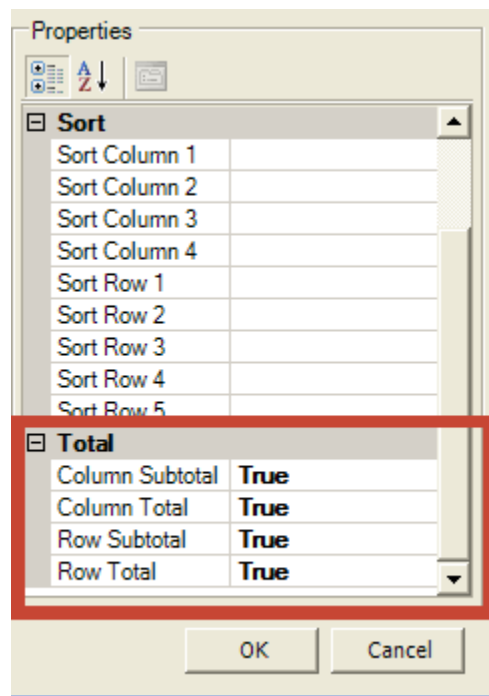


3. Use the Properties pane to select **Aggregation**. You can choose Sum, Count, or Average. Then choose a number **Format**, as shown in the following figure:



4. By default subtotals for rows and columns are displayed. You can choose not to display the subtotals by setting the properties to False.

The following figure shows the properties for setting totals and subtotals.



- Click **Preview** to see how the pivot table is displayed before you insert it into the template. Click **OK** to insert the pivot table into the template. The following figure shows how the pivot table is displayed in the template.

CH		G	Total
		INDUSTRYE	
G YEAR		G 999.00E	999.00
B	G MONTH	G 999.00E	999.00E
		G 999.00E	999.00

At runtime, this pivot table is generated as shown in the following table:

		Building material & garden eq. & supplies dealers	Clothing & clothing accessories stores	Electronics & appliance stores	Food services & drinking places	Food & beverage stores	Furniture & home furnishings stores
2006		48,531.00	31,528.00	15,472.00	61,967.00	81,303.00	17,073.00
	February	23,146.00	15,611.00	7,710.00	30,803.00	40,449.00	8,418.00
	March	25,385.00	15,917.00	7,762.00	31,164.00	40,854.00	8,655.00
2007		79,625.00	48,991.00	24,726.00	99,088.00	127,991.00	26,468.00
	February	26,369.00	16,497.00	8,320.00	33,239.00	42,723.00	8,859.00
	January	26,480.00	16,316.00	8,114.00	32,852.00	42,553.00	8,805.00
	March	26,776.00	16,178.00	8,292.00	32,997.00	42,715.00	8,804.00
		128,156.00	80,519.00	40,198.00	161,055.00	209,294.00	43,541.00



## Manually Edit a Pivot Table

This section describes the code inserted by the pivot table builder.

When the Template Builder inserts the pivot table, it inserts a Publisher command of the following structure:

```
<?crosstab: cvarname; "data-element"; "rows"; "columns"; "measures"; "aggregation"?>
```

Parameter	Description	Example
Ctvarname	Crosstab variable name. This is automatically generated by the Add-in.	C123
data-element	This is the XML data element that contains the data elements to include in the pivot table. If the pivot table is inside a repeating group, this field must be manually edited to achieve the expected results. See the table following this section.	"//ROW"
rows	<p>This parameter defines the XML elements for row headers. The ordering information is specified within "{" and "}". The first attribute is the sort element. If not specified, the row header element is used as the sort element.</p> <p>Supported attributes are:</p> <ul style="list-style-type: none"> <li>o - specifies the sort order. Valid values are "a" for ascending or "d" for descending.</li> <li>t - specifies the data type. Valid values are "t" for text or "n" for numeric.</li> </ul> <p>You can specify more than one sort element, for example:</p> <pre>"emp-full-name {emp-lastname,o=a,t=n} {emp-firstname,o=a,t=n}"</pre> <p>sorts employee by last name and first name. Note that the sort element can be any element in the dataset, and doesn't have to be included in the pivot table. In the preceding example, emp-lastname and emp-firstname don't have to be elements included in the pivot table.</p>	<pre>"REGION{,o=a,t=t}, DISTRICT{,o=a,t=t}"</pre> <p>In the example, the first row header is "REGION". It's sorted by "REGION", order is ascending, and type is text. The second row header is "DISTRICT". It's sorted by "DISTRICT", order is ascending, and type is text.</p>
columns	<p>This parameter defines the XML elements for column headers. The ordering information is specified within "{" and "}". The first attribute is the sort element. If not specified, the column header element is used as the sort element.</p> <p>Supported attributes are:</p> <ul style="list-style-type: none"> <li>o - specifies the sort order. Valid values are "a" for ascending or "d" for descending.</li> <li>t - specifies the data type. Valid values are "t" for text or "n" for numeric.</li> </ul> <p>You can specify more than one sort element, for example:</p> <pre>"emp-full-name {emp-lastname,o=a,t=n} {emp-firstname,o=a,t=n}"</pre> <p>sorts employee by last name and first name. Note that the sort element can be any element in the dataset, and doesn't have to be included in the pivot table. In the preceding example, emp-lastname and emp-firstname don't have to be elements included in the pivot table.</p>	<pre>"ProductsBrand{,o=a,t=t}, PeriodYear{,o=a,t=t}"</pre> <p>In the example, the first column header is "ProductsBrand". It's sorted by "ProductsBrand"; the order is ascending, and type is text. The second column header is "PeriodYear". It's sorted by "PeriodYear"; the order is ascending, and type is text.</p>
measures	This parameter defines the XML elements used as measures.	"Revenue, PrevRevenue"

Parameter	Description	Example
aggregation	This parameter specifies the aggregation function. Currently, the only supported value is "sum".	"sum"

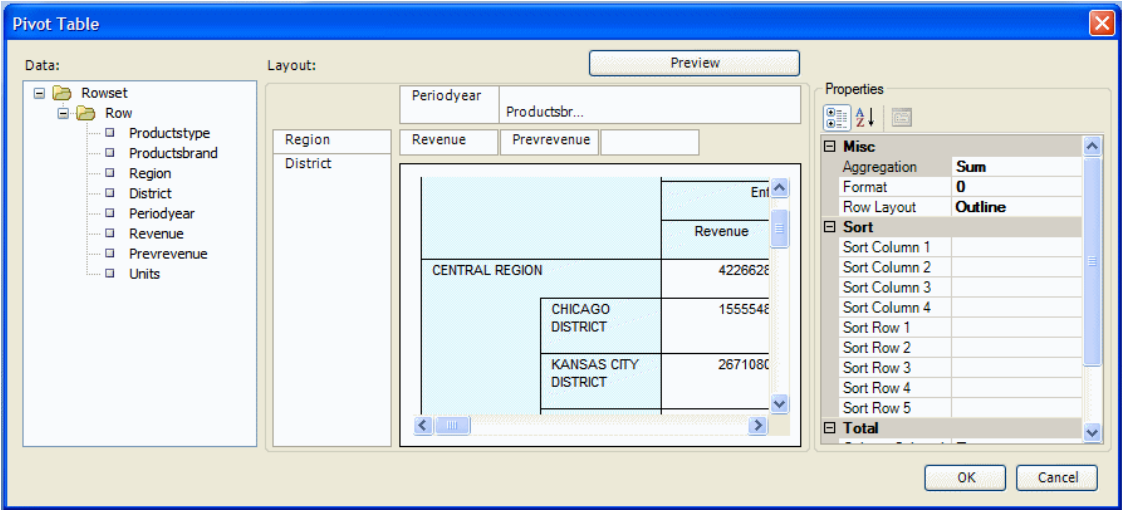
Example

This example uses the following XML data:

```
- <ROWSET>
- <ROW>
  <ProductsType>COATINGS</ProductsType>
  <ProductsBrand>Enterprise</ProductsBrand> <Region>CENTRAL REGION</Region>
  <District>CHICAGO DISTRICT</District>
  <PeriodYear>1998</PeriodYear>
  <Revenue>1555548.0</Revenue>
  <PrevRevenue>125968</PrevRevenue>
  <Units>11</Units>
</ROW>
...
</ROWSET>
```

The full dataset includes four values for ProductsBrand, four values for Region, and two values for PeriodYear to be displayed in the pivot table.

Using the Template Builder for Word and the sample XML file you can create a pivot table as shown in the following illustration.



The generated XDO command for this pivot tables is as follows:

```
<?crosstab:c4536;"/>  
ROW";"Region{o=a,t=t},District{o=a,t=t}";"PeriodYear{o=a,t=t},ProductsBrand{o=a,t=t}";"Revenue,PrevRevenue";"sum"?>
```

Running the command on the given XML data files generates this XML file "cttree.xml". Each XPath in the "cttree.xml" is described in the following table. The information in the table is to

help you understand how Publisher constructs the pivot table. The generated ctree.xml file isn't accessible for viewing or updating.

Element	XPath	Count	Description
C0	/cttree/C0	1	This contains elements which are related to column.
C1	/cttree/C0/C1	4	The first level column "ProductsBrand". There're four distinct values, shown in the label H element.
CS	/cttree/C0/C1/CS	4	The column-span value. It's used to format the pivot table.
H	/cttree/C0/C1/H	4	The column header label. There're four distinct values "Enterprise", "Magicolor", "McCloskey" and "Valspar".
T1	/cttree/C0/C1/T1	4	The sum for measure 1, which is Revenue.
T2	/cttree/C0/C1/T2	4	The sum for measure 2, which is PrevRevenue.
C2	/cttree/C0/C1/C2	8	The first level column "PeriodYear", which is the second group-by key. There're two distinct values "2001" and "2002".
H	/cttree/C0/C1/C2/H	8	The column header label. There're two distinct values "2001" and "2002". Because it's under C1, the total number of entries is $4 \times 2 = 8$ .
T1	/cttree/C0/C1/C2/T1	8	The sum for measure 1 "Revenue".
T2	/cttree/C0/C1/C2/T2	8	The sum for measure 2 "PrevRevenue".
M0	/cttree/M0	1	This contains elements that are related to measures.
M1	/cttree/M0/M1	1	This contains summary for measure 1.
H	/cttree/M0/M1/H	1	The measure 1 label, which is "Revenue".
T	/cttree/M0/M1/T	1	The sum of measure 1 for the entire Xpath from "// ROW".
M2	/cttree/M0/M2	1	This contains summary for measure 2.
H	/cttree/M0/M2/H	1	The measure 2 label, which is "PrevRevenue".
T	/cttree/M0/M2/T	1	The sum of measure 2 for the entire Xpath from "// ROW".
R0	/cttree/R0	1	This contains elements that are related to row.
R1	/cttree/R0/R1	4	The first level row "Region". There're four distinct values, shown in the label H element.
H	/cttree/R0/R1/H	4	This is the row header label for "Region". There're four distinct values "CENTRAL REGION", "EASTERN REGION", "SOUTHERN REGION" and "WESTERN REGION".
RS	/cttree/R0/R1/RS	4	The row-span value. It's used to format the crosstab table.
T1	/cttree/R0/R1/T1	4	The sum of measure 1 "Revenue" for each distinct "Region" value.
T2	/cttree/R0/R1/T2	4	The sum of measure 1 "Revenue" for each distinct "Region" value.
R1C1	/cttree/R0/R1/R1C1	16	This contains elements from combining R1 and C1. There're 4 distinct values for "Region", and four distinct values for "ProductsBrand". Therefore, the combination is $4 \times 4 = 16$ .

Element	XPath	Count	Description
T1	/cttree/R0/R1/R1C1/T1	16	The sum of measure 1 "Revenue" for each combination of "Region" and "ProductsBrand".
T2	/cttree/R0/R1/R1C1/T2	16	The sum of measure 2 "PrevRevenue" for each combination of "Region" and "ProductsBrand".
R1C2	cttree/R0/R1/R1C1/R1C2	32	This contains elements from combining R1, C1 and C2. There're 4 distinct values for "Region", and four distinct values for "ProductsBrand", and two distinct values of "PeriodYear". Therefore, the combination is $4 \times 4 \times 2 = 32$ .
T1	/cttree/R0/R1/R1C1/R1C2/T1	32	The sum of measure 1 "Revenue" for each combination of "Region", "ProductsBrand" and "PeriodYear".
T2	/cttree/R0/R1/R1C1/R1C2/T2	32	The sum of measure 2 "PrevRevenue" for each combination of "Region", "ProductsBrand" and "PeriodYear".
R2	/cttree/R0/R1/R2	18	This contains elements from combining R1 "Region" and R2 "District". Because the list of values in R2 has dependency on R1, the number of entries isn't just a simple multiplication.
H	/cttree/R0/R1/R2/H	18	The row header label for R2 "District".
R1N	/cttree/R0/R1/R2/R1N	18	The R2 position number within R1. This is used to check if it's the last row, and draw table border accordingly.
T1	/cttree/R0/R1/R2/T1	18	The sum of measure 1 "Revenue" for each combination "Region" and "District".
T2	/cttree/R0/R1/R2/T2	18	The sum of measure 2 "PrevRevenue" for each combination of "Region" and "District".
R2C1	/cttree/R0/R1/R2/R2C1	72	This contains elements from combining R1, R2 and C1.
T1	/cttree/R0/R1/R2/R2C1/T1	72	The sum of measure 1 "Revenue" for each combination of "Region", "District" and "ProductsBrand".
T2	/cttree/R0/R1/R2/R2C1/T2	72	The sum of measure 2 "PrevRevenue" for each combination of "Region", "District" and "ProductsBrand".
R2C2	/cttree/R0/R1/R2/R2C1/R2C2	144	This contains elements from combining R1, R2, C1 and C2, which gives the finest level of details.
M1	/cttree/R0/R1/R2/R2C1/R2C2/M1	144	The sum of measure 1 "Revenue".
M2	/cttree/R0/R1/R2/R2C1/R2C2/M2	144	The sum of measure 2 "PrevRevenue".

## Insert a Pivot Table in a Repeating Group

When you create a pivot table inside a repeating group you must manually edit the pivot table code so that the elements included in the pivot table respect the grouping context. The edit to the code depends on how you grouped the data.

### Procedure When Using the Template Builder "Group by" Feature

If your data is flat and you used the Template Builder's Group By feature to group your data, then use this procedure. After inserting the pivot table, open the Publisher Properties dialog to view the `<?crosstab...?>` code. In the `crosstab` command, update the data-element component to `current-group()`.

For example, assume in the preceding example you created a repeating group around the pivot table that is grouped by the `<Region>` element.

To edit the pivot table code:

1. Select and right-click the inserted pivot table. From the menu, select **BI Publisher Properties** to view the `<?crosstab...?>` command. Alternatively, open the Template Builder **Field Browser** and select the `<?crosstab:...?>` command.
2. Replace the data-element component with `"current-group()"`. For example, in the sample, the data-element value is `"//ROW"`. Replace the value `"//ROW"` with `"current-group()"` as follows:

```
<?crosstab:c4536;"current-  
group()";"Region{,o=a,t=t},District{,o=a,t=t}";"PeriodYear{,o=a,t=t},ProductsBrand{,o=a,t=t}";"Revenue,Prev  
Revenue";"sum"?>
```

This applies the XDO `crosstab` command only across the current group to return the expected values in the pivot table.

### Example 14-1 Procedure When the Data is Already Grouped

If the data input to the Template Builder is already grouped, then you must insert the appropriate XPath for the data-element component to ensure that the pivot table only includes the elements in the current group.

For example, assume the data for this report is structured as follows:

```
<ROWSET> <REGION>  
<RegionName>CENTRAL REGION</RegionName>  
<ProductList>  
<Product>  
<ProductsBrand>Enterprise</ProductsBrand>  
<District>CHICAGO DISTRICT</District>  
<PeriodYear>2001</PeriodYear>  
<Revenue>1555548.0</Revenue>  
<PrevRevenue>125968</PrevRevenue>  
<Units>11</Units>  
</Product>  
</ProductList>  
</REGION>  
</ROWSET>
```

In your template you insert a repeating group based on the `<REGION>` element. When you insert the pivot table within the repeating group, the code appears as

```
<?crosstab:c10959;"//  
Product";"District{,o=a,t=t},ProductsBrand{,o=a,t=t}";"PeriodYear{,o=a,t=t}";"Revenue,PrevRevenue";"sum"?>
```

In this case, to instruct Publisher to use only the elements under the current REGION grouping, edit the data-element to use the relative XPath as follows: `./Product`. The edited code is:

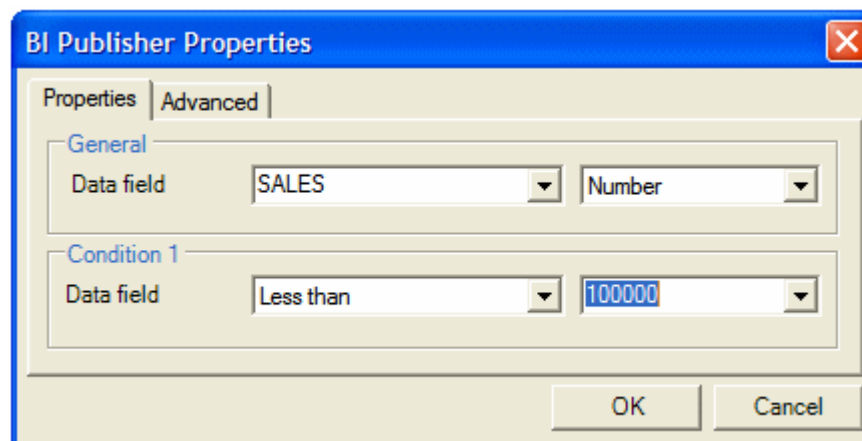
```
<?crosstab:c10959;".//  
Product";"District{o=a,t=t},ProductsBrand{o=a,t=t}";"PeriodYear{o=a,t=t}";"Revenue,PrevRevenue";"sum"?>
```

## Insert and Edit Conditional Regions

A conditional region is an area that is surrounded by a conditional statement. If the statement tests true, the area is displayed in the report; if the condition tests false, the area is suppressed from the report.

For example, the data contains sales information. The report contains a table that displays sales by industry. You want this table in the report to display information for industries with sales amounts lower than 100,000. Using the insert conditional region functionality, you can select the region that contains the sales table and insert the condition that the sales element must be less than 100,000.

1. Select the region that you want to apply the condition to. For example, if you want to display a table only for a certain condition, then select the region that contains the table. Note that the region must be inside a loop.
2. On the Publisher menu, on the Insert group, click **Conditional Region**. The following figure shows the Publisher Properties dialog for a Conditional region.



3. Enter the following fields:

**Data Field** - Select the field to test for the condition. Select the data type of the field: Number or Date/Text.

**(Condition 1) Data field** - Select the comparison operator.

Select the value to meet the condition. Note that you can enter an integer, enter text, or select another data element to define a comparison based on the incoming values.

4. Click **OK**. The form fields that contain the conditional logic are inserted around the region. The beginning form field displays the text "C" and the form field closing the region displays the text "EC".

To edit the conditional region, double-click the inserted form field to launch the dialog for editing; or, right-click the form field and select **BI Publisher**, then **Properties**.

## Insert Conditional Formatting

Using the Conditional Format feature you can insert simple conditional formats to apply to table rows or cells. The dialog provides several common options that you can select and the Template Builder inserts the code automatically. The Conditional Format dialog supports two conditions per field.

The Conditional Format dialog cannot be used inside of pivot tables. You must insert the conditional formatting logic directly to the appropriate form fields.

To insert a conditional format:

1. Place the cursor in the table cell of the data element for which you want to define the condition.
2. On the Publisher menu, on the Insert group, click **Conditional Format**.
3. Enter the following in the Conditional Format dialog

**Data Field** - Select the element to test for the condition and the data type of the element (Number or Date/Text).

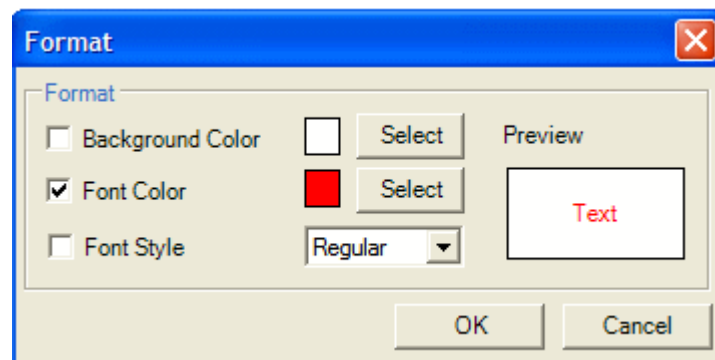
**Apply to Entire Table Row** - If you want the format applied to the entire table row, not just the cell of the selected element, then select this box.

**Condition 1) Data field** - Select the comparison operator.

Select the value to meet the condition. You can enter an integer, enter text, or select another data element to define a comparison based on the incoming values.

4. Click **Format** to define the format you want to apply when the condition is met. Options are background color, font color, and font style (regular, bold, italic, bold italic). Select the box and format of each option you want to apply. After you select the format, the Preview region displays the format chosen.

The following figure shows the Format dialog.



5. Define a second condition if desired.
6. Click **OK**. The conditional format field is inserted as a form field with the display text "C".

To edit the conditional format, double-click the inserted form field to launch the dialog for editing; or, right-click the form field and select **Publisher**, then **Properties**.

## Preview a Template

The Preview menu group enables you to preview the RTF template with sample XML data.

From the Preview group, select the output format. If you haven't saved the template as an RTF file, then you are prompted to do so. Ensure that you've loaded sample data to the Template Builder to preview the report.

- **PDF**

You must have Adobe Acrobat Reader version 5.0 or higher installed to preview documents in PDF format.

- **HTML**

Launches the default browser to display the report.

- **EXCEL**

To use this option, you must have Microsoft Excel 2003 or later. If you have Excel 2007, this option generates the document in .xlsx, the default Office Excel 2007 XML-based file format.

If you have Excel 2003 this option generates the document in MHTML and opens the document in Excel.

- **EXCEL 2000**

Generates HTML and launches Microsoft Excel to render it. Embedded images such as charts and logos are not supported in this output type. If you do not have Microsoft Excel 2003 or later, use this option.

- **RTF**

Generates the report in Rich Text Format.

- **PowerPoint**

Requires Microsoft PowerPoint 2003 or 2007.

## Template Editing Tools

This section describes additional tools provided with the Template Builder to help you validate and edit the template.

This section includes:

- [Edit and View Field Properties](#)
- [Validate a Template](#)
- [Use the Field Browser](#)
- [Check Accessibility](#)

## Edit and View Field Properties

Once you've inserted a data field, you can view or edit the field properties in the Publisher Properties dialog.

You can also insert a field.

To invoke the Publisher Properties dialog, perform one of the following:



- Double-click the field
- Right-click the field, from the menu select Publisher, then **Properties**

## About the Properties Tab

Publisher **Properties** tab defines the different fields and options available in the **General**, **Formatting**, and **Data Aggregation** panes of the tab.

You can set the following properties for a data field:

**Data Field** - Select the data field from the list of available fields from the loaded data source.

**Text to Display** - Enter the display text for the form field in the template. This text is replaced at runtime by the value in the data.

**Type** - Select the type of data. Options are **Regular Text**, **Number**, **Date**, **Current Date**, and **Current Time**. The selection in this field determines the format options.

**Format** - For any data type except Regular Text, you can select from several number or date display formatting masks or enter your own.

**Force LTR** - (Force Left-to-Right) Use this check box when you are publishing the template in a language that prints the characters from right to left, such as Arabic or Hebrew. Use this option to force left-to-right printing for fields such as phone numbers, addresses, postal codes, or bank account numbers.

**Function** - This feature enables you to perform aggregation functions (Sum, Average, Count, Minimum, Maximum) on data fields. For example, if you select sum for a data field, then the field shows the sum of all occurring values for this data field depending on the scope.

**Scope** (informational only) - This field has two possible values:

- **Group Item** - Indicates that the data field is inside a group. If you choose to perform a function on the field, then only the occurrences of the field within the current group are included in the aggregation.
- **Normal** - Indicates that the field isn't inside a group. Aggregation functions are performed on all occurrences of the field in the data.

## About the Advanced Tab

The **Advanced** tab displays the underlying code.

If the code pattern within the form field isn't recognized (for example, because you added commands manually to the field), then the Publisher Properties dialog displays this tab only.

Use this tab to edit or add code to the form field manually. Click **OK** to update the template.

## About the Word Properties Button

The **Word Properties** button opens the Microsoft Word Text Form Field Options dialog. You can also use this dialog to set the data type and number format.

The underlying code used by Publisher is also available by clicking the **Add Help Text** button.

## Validate a Template

The Template Builder provides a validation tool to check the template for incorrect use of commands and unsupported elements in the RTF file.

To validate the template:

- On the Publisher menu, on the Tools group, click **Validate Template**.

If there're no validation errors, then a "No Error found" message is returned. If an error is found, then an error message is displayed. You can use the Field Browser to help locate the error.

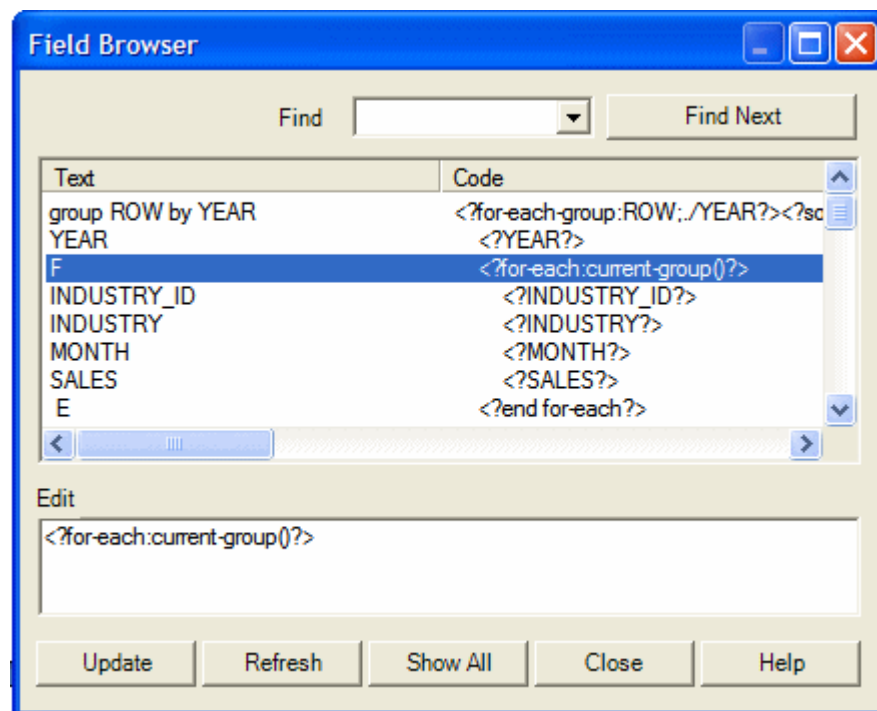
## Use the Field Browser

The Field Browser dialog provides a fast way to review and update the instructions hidden in the Microsoft Word form fields.

This dialog is particularly useful to understand and modify existing templates.

On the Tools group, click **Field Browser**.

The following illustration shows the Field Browser dialog.



The Field Browser dialog shows a table with the display text of the form field in the Text column and the underlying code instructions in the second Code column. When you select a specific row in the dialog, the matching form field is selected in the Microsoft Word document.

If you select some part of the text before opening the Field Browser, then the dialog shows only the fields in the selection. If no text is selected, then the field browser shows all fields in the document.

The options in the Field Browser are described in the following table.

Option	Description
Edit	You can update processing instructions directly from the Field Browser dialog. Select a field in the Text table. The Edit box shows the processing instructions for the field. To change the instructions for the field modify the text in the Edit field and click <b>Update</b> .
Refresh	The Field Browser dialog isn't aware of any form fields that you've added or modified while the dialog is open. Click <b>Refresh</b> to show any changes to the document since the Field Browser dialog has been opened.
Show All	If you opened the browser with a part of the document selected, then you see only the form fields in the selected area. Click <b>Show All</b> to see all the form fields in the document.
Close	Click <b>Close</b> to close the field property browser. The only button doesn't automatically update any changes in the edit field, therefore ensure that you select <b>Update</b> if you want to save edits.

## Check Accessibility

The Template Builder provides an accessibility checker to check the template for features to enhance the accessibility of the report for report consumers who may need assistive technologies to view the report.

To check for the presence of accessibility features: On the Publisher tab, in the **Tools** group, click **Check Accessibility**. The tool generates a report that indicates areas of a template that do not include the following accessibility features:

- document title
- alternative text for images
- table summary for data tables
- column header for data tables
- row header for data tables

In some cases the accessibility checker cannot determine if the accessibility feature is present and generates a warning. The report designer can then verify that the accessibility features are present.

For information on how to add these features to the template, see [Design Accessible Reports](#).

## Upload a Template to Publisher

If you used the Open Template dialog to connect to Publisher, and load the data to the Template Builder, or if you downloaded an existing template from the Publisher catalog, then you can upload the new or updated layout back to the report definition on the server.

See [Work in Connected Mode](#).

If you downloaded an existing template and want to upload the modifications to the template, then select **Upload Template** from the Publisher menu.

If this is a new template for the report definition, then use the **Upload Template As** option to upload the layout to the report definition on the server. Also use this option to upload modifications to an existing template under a different name.

# Use the Template Builder Translation Tools

Translation is simplified by using Template Builder tools.

The Template Builder provides tools to help you create and test translations for templates.

## About Translations

The section describes options for adding translated templates to a report.

There're two options for adding translated templates to a Publisher report definition:

- Create a separate RTF template that is translated (a localized template)
- Generate an XLIFF file from the original template (at runtime the original template is applied for the layout and the XLIFF file is applied for the translation)

Use the first option if the translated template requires a different layout from the original template.

If you only require translation of the text strings of the template layout, use the XLIFF option.

For detailed information, see [Translation Support Overview and Concepts](#).

To use the Template Builder translation tools to create templates for translations, see the following topics in this section:

- Extracting Text to an XLIFF File for Translation
- Previewing a Translation
- Localizing a Template

For a demo on Publisher's localization capabilities, see the LocalizationDemo.exe demo provided with the Template Builder installation (located in the Publisher\Oracle Analytics Publisher Desktop\demos folder where you installed Oracle Analytics Publisher Desktop).

## Extract Text to an XLIFF File for Translation

This menu item allows you to create a standard XLIFF translation file that contains the boilerplate text from the template. XLIFF is a standard file format that is understood by many translation software packages. Since an XLIFF is an XML file, you can translate the text in a regular text editor.

A *translatable string* is any text in the template intended for display in the published report, such as table headers and field labels. Text supplied at runtime from the data isn't translatable, nor is any text that you supply in the Microsoft Word form fields.

To extract text to an XLIFF file for translation:

1. From the Publisher menu, select **Tools**, then **Translate Template**, then **Extract Text**.
2. You are prompted to save the extract file as an XML file type. Enter a name for the extract file and save to the desired location.
3. If you want to translate the template manually, open the .xlf file using a text editor and enter the translated strings in the file.
4. When done, you can preview the translation. Then upload the file to the Publisher report definition.

## Preview the Template and Translation File

You can preview the translation of a template as a PDF file.

To preview the template with the translated XLIFF file applied:

1. From Publisher, in the Tools group, click **Translation**, then **Preview Translation**.
2. You are prompted to select the saved XLIFF file. Locate the file, and click **Open**.

The Template Builder merges the sample data, the translation file, and the RTF template to generate a PDF for preview.

## Localize a Template

Localizing a template means that you are creating a template to be used for a specific language.

Because Publisher enables you to extract the boilerplate text strings from a template into an XLIFF file that can be translated and then applied at runtime, if the reports for additional languages only require the translation of these text strings, then you only need to supply translated XLIFF files to accompany the base template.

However, you would localize a template when the requirements for the report in the specific language go beyond the simple translation of the text in the layout.

To save a template as a localized template:

1. From the Publisher menu, in the Tools group, select **Translations**, then **Localize Template**. This invokes a warning message that localizing the template overwrites the template. Click **OK**.
2. You are prompted to select the XLIFF translation file. Locate the appropriate file and click **Open**.

The translated XLIFF file is applied to the template that you currently have open in Microsoft Word.

3. Save the localized template.
4. Upload the template file to the appropriate report definition in the catalog. Select the appropriate locale in the upload dialog.

## Set Options for the Template Builder

Use the Options dialog to specify template settings.

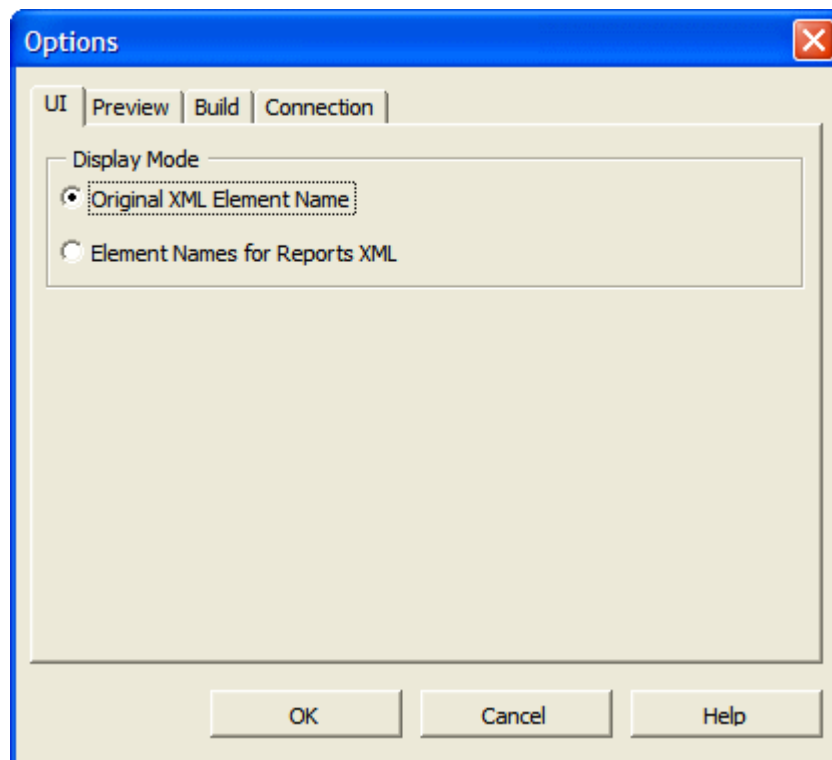
Access the Options dialog as follows: In the **Options** group, click **Options**.

The Options dialog contains four tabs: UI, Preview, Build, and Connection, as described in the following sections.

## Set UI Options

Use the Options dialog: UI tab to set options that influence the look and feel of the Template Builder.

The following illustration shows the Options dialog: UI tab.

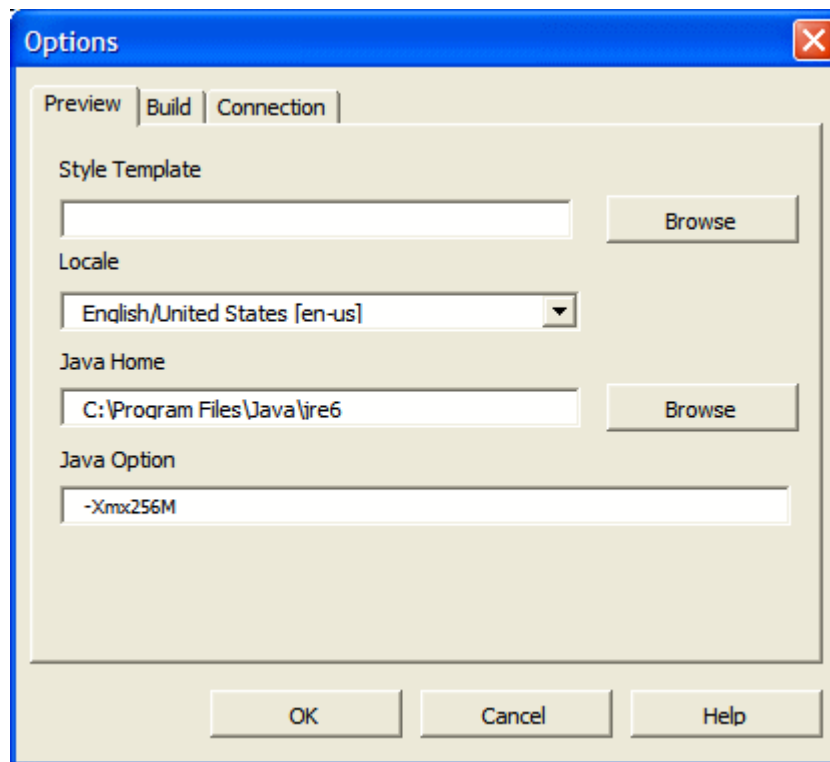


The tree view that shows the data source can show either the correct XML tag names of the data source or they can show a slightly modified version that is easier to read. Select the option **Element Names for Report XML** to show the modified labels. These labels contain no <> characters, use "Title case" and use spaces (" ") instead of underscores ("\_").

## Set Preview Options

The Options dialog: Preview tab allows you to specify options that influence the Preview functionality of the Template Builder.

The following illustration shows the Options dialog: Preview tab.



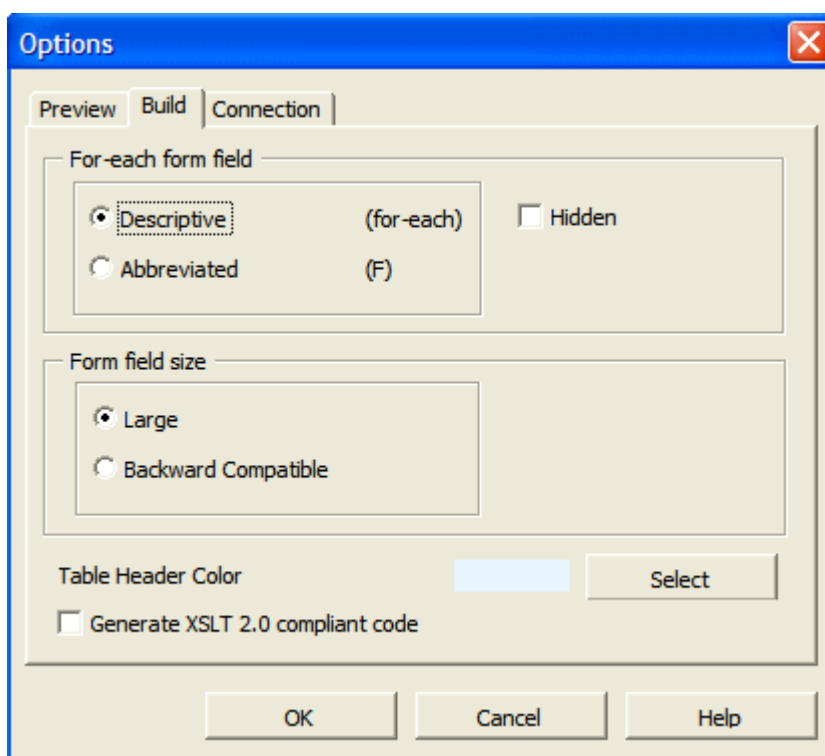
The following table describes the options available from the Preview tab.

Option	Description
Style Template	If you have a Publisher Style Template available locally, then you can specify it here. A style template is an RTF template that contains style information that can be applied to RTF layouts, similar to a style sheet. The style information in the style template is applied to RTF layouts at runtime to achieve a consistent look and feel across your enterprise reports. For more information, <a href="#">Create and Implement Style Templates</a> .
Locale	You can choose the language and territory used for previewing the template. While this change doesn't automatically translate any files, it's important to set the correct locale for the preview to use the correct direction of the text (left-to-right or right-to-left), and to correctly set locale-specific date, number, and currency formats.
Java Home	The Preview (and export functionality) requires Java code. You can change the path to the JAVA HOME directory. If you don't specify this option, the Template Builder assumes that the Java virtual machine (java.exe) is accessible in the PATH specified in the environment variables of Windows.
Java Option	Specify the memory to reserve for the Template Builder to process the template. The default value is -Xmx256M.

## Set Build Options

Use the Options dialog: Build tab to specify options that influence how the Template Builder generates tables and forms.

The following illustration shows the Options dialog: Build tab.



The following table describes the options available from the Build tab.

Option	Description
<b>For-each form field</b>	<p>Select how the Template Builder creates the form fields for processing instructions in the Insert Table/Form dialog.</p> <p>The <b>Descriptive</b> option (for example: <b>for-each Invoice</b>) renders a descriptive form field for the processing instructions. This option makes the layout template easier to understand. However, the longer fields may distract from the visual layout of the template. Note that the descriptive option doesn't apply to fields within table cells.</p> <p>The <b>Abbreviated</b> option (for example: <b>F</b>) provides a one letter abbreviation for each instruction.</p> <p>Select the <b>Hidden</b> box to generate the processing instruction form fields using Microsoft Word's hidden font effect. Hidden text is hidden in the Print Preview and you may display or hide the hidden text by changing the Hidden Text setting in the Display group of the Microsoft Word Options.</p>
<b>Form Field Size</b>	<p><b>Large</b> - inserts the code to a document variable. The document variable field can accommodate approximately 48 kilobytes of code line.</p> <p>This setting affects only fields that are created or edited while this option is set. The form fields created with the Large setting cannot be understood by Publisher 10g. If the template is intended for use with the 10g version of Publisher, use the Backward Compatibility setting.</p> <p><b>Backward Compatible</b> - in previous versions of the Template Builder the Publisher code was inserted to the Microsoft Word Form Field Help Text box. This limited the length of code that could be inserted for a single form field. By default, the Large option is used because it can accommodate much larger code strings. However, the Large option isn't compatible with Publisher10g.</p>



Option	Description
<b>Table Header Color</b>	When you insert a table using the Table Wizard or the Insert Table/Form dialog the Template Builder applies the Table Header Color specified here to the table header background. Customize the default color for the templates.
<b>Generate XSLT 2.0 compliant code</b>	<p>Publisher uses the XSLT processor provided by Oracle XDK 11.1.0.7.0, which supports the W3C XSL Transformations 1.0 recommendation. The processor also implements the current working drafts of the XSLT and XPath 2.0 standards.</p> <p>By default, Publisher is compatible with XSLT 1.0. If you want to use XSLT and XPath 2.0 features in the template, then enable this option. This configuration is performed at the template level. The template-level setting overrides the server setting.</p>

## Set Connection Options

Options on this tab are reserved for a future release.

## Set Up a Configuration File

The Template Builder can be used with a configuration file.

The configuration file must be named xdoconfig.xml and must be stored in the config directory (example path: C:\Program Files\Oracle\BI Publisher Desktop\Template Builder for Word\config).

Alternatively, you can use the file name xdo.cfg. The configuration file allows you to:

- Define additional fonts such as Windings to test the templates
- Use security settings for PDF files

## Publisher Menu Reference

After you install the Template Builder, the next time you open Microsoft Word, you see the Publisher menu.

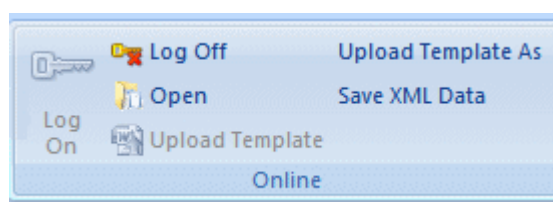
If the Publisher menu isn't available after you install the Template Builder, modify the Add-In settings.

## About the Online Group

The Online group of commands enable you to initiate interaction with the Publisher application.

For more information about working with the online commands, see [Work in Connected Mode](#).

The following figure shows the Online group of commands.



The following table describes the commands available for the Online group.

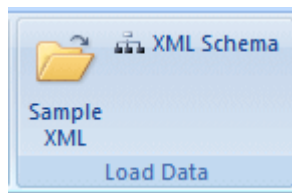
Command	Description
<b>Log on</b>	Enables you to log in to Publisher. Enter your user name and password. Select or enter the URL for the Publisher Report Server (see your Administrator if you do not know the URL). When you log on, the Open Template dialog is displayed.  You must log in directly to the Publisher server. For example: <code>http://www.example.com:7001/xmlpserver</code> .
<b>Open</b>	After you log on, this command becomes available to enable you to open a report in the Publisher catalog.
<b>Upload Template</b>	If you used the Open Template dialog to download a template from the Publisher catalog, use this option to upload the updated layout back to the report definition in the catalog.
<b>Upload Template As</b>	If you used the Open Template dialog to download a template or to open a report from the catalog, use this option to upload the layout to the report definition in the catalog. Also use this option to upload modifications to an existing template under a different name.
<b>Save XML Data</b>	If you are working in connected mode, then use this command to save the data to a local directory if you also need access to the data in disconnected mode.

## About the Load Data Group

The Load Data group of commands enables you to load a saved sample data file or sample schema to the Template Builder.

You must load data to use most of the Template Builder functionality. See [Access Data for Building Templates](#) for more options for loading data to the Template Builder.

The following figure shows the Load Data group of commands.



The Load Data Group options table below describes the commands available for the Load Data group.

Command	Description
<b>Sample XML</b>	This command enables you to load a previously saved sample XML file from the report data source. If you are not connected to the Publisher server, use this method to load the data.

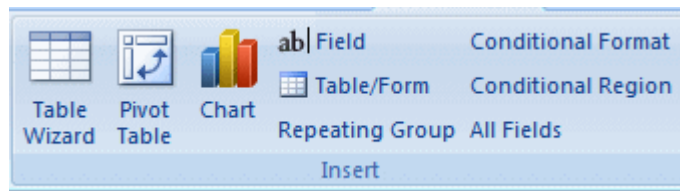
Command	Description
<b>XML Schema</b>	This command enables you to load an XML Schema file (.xsd) that contains the fields available in the report XML data. The XML schema has the advantage of being complete (a sample xml file may not contain all the fields from the data source). For the preview, the Template Builder can generate dummy sample data for an XML Schema. However, the preview works better if you also upload real sample data.

## About the Insert Group

Use the Insert group of commands to insert the layout components to the template.

To insert components, see [Insert Components to the Template](#).

The following figure shows the Insert group of commands.



Command	Description
<b>Table Wizard</b>	This function provides a wizard that guides you through the creation of tables used in typical reports.
<b>Pivot Table</b>	The <b>Pivot Table</b> function enables you to drag and drop the data elements to a pivot table structure.
<b>Chart</b>	Publisher doesn't recognize native Microsoft Word charts. The <b>Insert Chart</b> function allows you to insert a chart that's understood by Publisher.
<b>Field</b>	This function allows you to select fields from the data source and insert them into the template.  As a beginner, you should use Insert Fields only for data fields that are unique - none repeating - in the document. See <a href="#">Insert a Table Using the Table Wizard</a> for additional information on how to insert repetitive fields.
<b>Table/Form</b>	Use this function to insert data fields to be organized as a simple or nested table or as a form that's repeated with different data. You may even organize all the data fields for the whole document before inserting them.
<b>Repeating Group</b>	Enables you to select or define a group of elements that you want repeated for each occurrence of an element in the data.
<b>Conditional Format</b>	Enables you to define simple conditional formats to apply to table rows or cells.
<b>Conditional Region</b>	Enables you to insert a conditional statement around a region of the template.

Command	Description
<b>All Fields</b>	<p>This function inserts all fields found in the XML data into the document. It also inserts processing instructions into the document that repeats a section - such as a table row - when the associated XML element is repeated.</p> <p>XML documents often contain a large number of fields in a deeply nested hierarchy. For example, an Oracle Purchasing purchase order contains purchase order lines, which contain shipments, which contain distributions. The purchase order line alone contains more than 150 data fields. In these cases, you should use the Insert Table/Form function to have more control over which fields are inserted.</p>

## About the Preview Group

The Preview group of commands enables you to preview the RTF template with the sample XML data. The preview menu offers PDF, HTML, RTF, PowerPoint, and Excel as output formats.

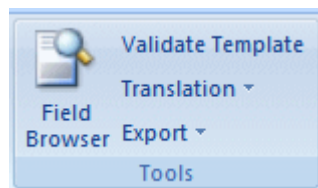
When you select any of the output formats, the Template Builder merges the data into the template and creates the output document.

## About the Tools Group

The section describes the commands available for a the **Tools** group.

For more information about using the commands in the **Tools** group refer to [Template Editing Tools](#) and [Use the Template Builder Translation Tools](#).

The following figure shows the **Tools** group of commands.



The table below describes the commands available for the **Tools** group.

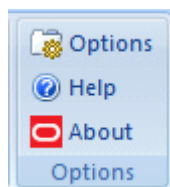
Command	Description
Field Browser	The field browser is a tool for advanced users who must change the Publisher commands that are hidden in the form fields. It shows the commands behind each form field and allows you to change them. Use this tool to correct flawed RTF templates or to update multiple fields efficiently.
Validate Template	The validation function checks the template for incorrect use of Publisher commands and unsupported elements in the Word file.

Command	Description
Translation	<p>Includes the following subcommands:</p> <ul style="list-style-type: none"> <li>• <b>Extract Text</b> - Enables you to create a standard XLIFF translation file that contains the boilerplate text from the template. XLIFF is a standard file format that is understood by many translation software packages. Because an XLIFF is an XML file, you can translate the text in a text editor. For more information on working with XLIFF files, see <a href="#">Work with Translation Files</a>.</li> <li>• <b>Preview Translation</b> - Enables you to preview the template as a PDF file using a specified XLIFF translation file. This functionality enables you to test translation files.</li> <li>• <b>Localize Template</b> - Applies a translation file to an RTF template. This means that in the current RTF template all boilerplate text is translated. The main function of this feature is to create a language-specific version of a template.</li> </ul>
Export	<p>Includes the following functions:</p> <ul style="list-style-type: none"> <li>• <b>XSL-FO Stylesheet</b> - Allows you to convert the RTF template into an enhanced XSL-FO stylesheet. This function can be used to generate XSL-FO for debugging or further customization.</li> <li>• <b>Formatted XML</b> - Enables you to apply the XSL-FO stylesheet generated from the Word document to the sample data and save the intermediate FO format. This function is mainly for debugging.</li> <li>• <b>PDF</b> - Converts the Word document to PDF.</li> </ul>

## About the Options Group

The Options group of commands allows you to define preferences and options for using Publisher and access online help.

The following figure shows the Options group of commands.



See [Set Options for the Template Builder](#).

# Create Excel Templates

This topic describes creating report templates in Microsoft Excel using the Template Builder for Excel.

## Topics:

- [Introduction to Excel Templates](#)
- [Understand the Mappings Between Template and Data](#)
- [Use the Template Builder for Excel](#)
- [Build a Basic Template Using the Template Builder](#)
- [Format Dates](#)
- [Understand Excel Template](#)
- [Use Advanced Publisher Functions](#)
- [Preprocess the Data Using an XSL Transformation \(XSLT\) File](#)

## Introduction to Excel Templates

An Excel template is a report layout designed in Microsoft Excel for formatting your enterprise reporting data in Excel spreadsheets.

Excel templates provide a set of special features for mapping data to worksheets and for performing additional processing to control how the data is output to Excel workbooks.

This introduction includes the following topics:

- [Features of Excel Templates](#)
- [Limitations of Excel Templates](#)
- [Prerequisites](#)
- [Supported Output](#)
- [Desktop Tools for Excel Templates](#)
- [Sample Excel Templates](#)

## Features of Excel Templates

With Excel templates you can format the data in different ways.

- Define the format for the data in Excel output.
- Split hierarchical data across multiple sheets and dynamically name the sheets.
- Create sheets of data that have master-detail relationships.
- Use native XSL functions in the data to manipulate it prior to rendering.
- Use native Excel functionality.

## Limitations of Excel Templates

The following are limitations of Excel templates.

- When you use an Excel template,
  - You can't have more than 100,000 active cells in an Excel workbook.
  - You can't use conditional formatting based on the generated data to change the background color of a cell in the report output.
- For reports that split the data into multiple sheets, images aren't supported. If the template sheet includes images, when the data is split into multiple sheets, the images are displayed only on the first sheet.
- Publisher provides an add-in to Microsoft Excel to facilitate the insertion of fields and repeating groups. More complex designs require manual coding. Some features require the use of XSL and XSL Transformation (XSLT) specifications.
- The Template Builder for Excel limits the number of Excel template fields per Excel template to 990.

## Prerequisites

To design Excel templates, you must meet certain prerequisites.

- You must have Microsoft Excel 2003 or later installed. The template file must be saved as Excel 97-2003 Workbook binary format (\*.xls).  
If you're using a version of Excel later than Excel 2003 to create your template and save it as Excel 97-2003, ensure that you don't use any features of the later version that aren't supported in Excel 97-2003. For example, Excel 2003 allows only three conditional formatting rules per cell, but Excel 2007 allows more. If you apply more than three conditional formatting rules to a cell, only three are applied. Excel 2007 also provides color support not provided in Excel 2003.
- To use some of the advanced features, you must have knowledge of XSL.
- The data model must be created in Publisher with sample data available.

## Supported Output

Excel templates generate Excel binary (.xls) output only.

## Desktop Tools for Excel Templates

Publisher provides a downloadable add-in to Excel that provides these features.

- Connects directly to the Publisher server to load sample data and upload and download templates
- Inserts data field mappings to the template
- Inserts repeating group mappings to the template
- Provides a field browser to review all inserted code and to edit or delete mappings
- Previews the template using the sample data or live data when in connected mode

## Install the Template Builder for Excel

The Template Builder for Excel is installed automatically when you install the Oracle Analytics Publisher Desktop tools.

The tools can be downloaded from the Home page of Oracle Analytics Publisher as follows:

Under the Get Started region, select the Oracle Analytics Publisher Desktop option (32bit Office or 64bit Office) appropriate for your version of Microsoft Office.

The Excel Template Builder isn't compatible with the (deprecated) Analyzer for Excel. If you have the Analyzer for Excel installed from a previous version, the Publisher Tools installer detects its presence and halts the installation. You must remove the Analyzer for Excel before installing the Oracle Analytics Publisher Desktop. The Excel Template Builder includes a feature to import Analyzer for Excel templates to the Excel template format.

## Sample Excel Templates

The Template Builder installation includes sample Excel templates.

To access the samples from a Windows desktop:

- Click **Start**, **Programs**, Oracle Analytics Publisher Desktop, **Samples**, then **Excel**.

This action launches the folder that contains the Excel sample templates.

## Understand the Mappings Between Template and Data

When you design Excel templates use the Excel Template Builder for inserting fields and repeating groups to your template.

When the Template Builder inserts a field or repeating group it creates a mapping between the data and the spreadsheet and writes the mapping to a hidden sheet called the XDO\_METADATA sheet. The Template Builder creates the hidden XDO\_METADATA sheet the first time you insert a field or repeating group.

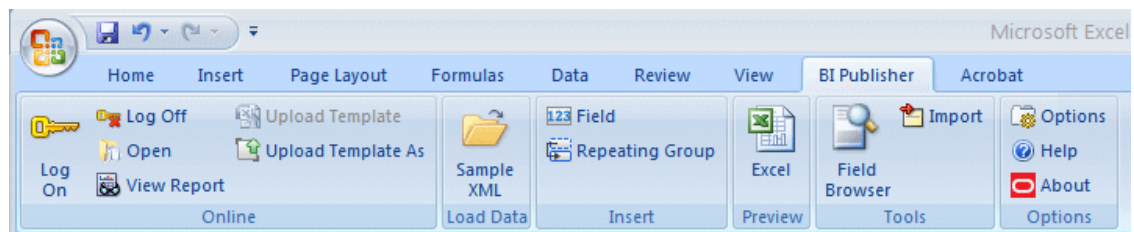
To view or update the XDO\_METADATA sheet unhide the sheet. To add calculations or more advanced functions, enter the XSL functions directly in the XDO\_METADATA sheet using the named mappings created by the Template Builder. For more information about template-data mappings, see [Understand Excel Template](#).

## Use the Template Builder for Excel

The Excel Template Builder facilitates template design by automating the insertion of simple mappings, providing preview functionality, and enabling direct connection to Publisher from your Excel session.

The Publisher tab that displays when you install the Template Builder is shown in the following illustration.





You can use the Template Builder in connected mode or disconnected mode. In connected mode, log in to the Publisher server from Excel. The connection enables you to browse the Publisher catalog and load sample data from an existing report or data model. When your template is complete, you can upload it directly to the report definition in the Publisher catalog. In disconnected mode, you must download a sample data file from the data model to your local client.

This section includes the following topics about using the Template Builder for Excel:

- [Work in Connected Mode](#)
- [Work in Disconnected Mode](#)
- [Insert Fields](#)
- [Insert Repeating Groups](#)
- [Use the Field Browser to View, Edit, and Delete Fields](#)
- [Preview Templates](#)
- [Import Excel Analyzer Templates](#)

## Work in Connected Mode

In connected mode you can interact directly with Publisher.

The process flow for creating or editing a template in connected mode is:

1. Open Excel with the Template Builder for Excel Add-in installed.
2. Log on to Publisher .
3. Select the report or data model for which you want to create a new layout; or, select an existing layout to modify.
4. Design your template in Excel.
5. Preview your template using the **View Report** or **Preview** command.
6. Use one of the upload template commands to upload your completed template to the catalog.

## Log In Through the Template Builder

The Excel Template Builder enables a direct connection to Publisher from your desktop Excel session.

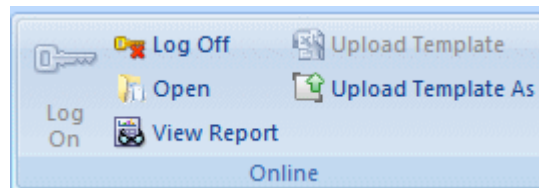
By logging in directly to Publisher, you can browse the catalog to choose the report to which to add the Excel template; or, if no report has been created, you can select the data model and create the report in the catalog from your Excel session.

To log in to Publisher from Excel:

1. In Excel, on the Publisher tab in the Online group, click **Log On**.
2. In the Login dialog, enter your Publisher username, password, and the URL. Publisher URL format: `http://www.<host>:<port>/xmlpserver`.

## Online Features of the Template Builder

After logging in, the following commands in the Online group become enabled.

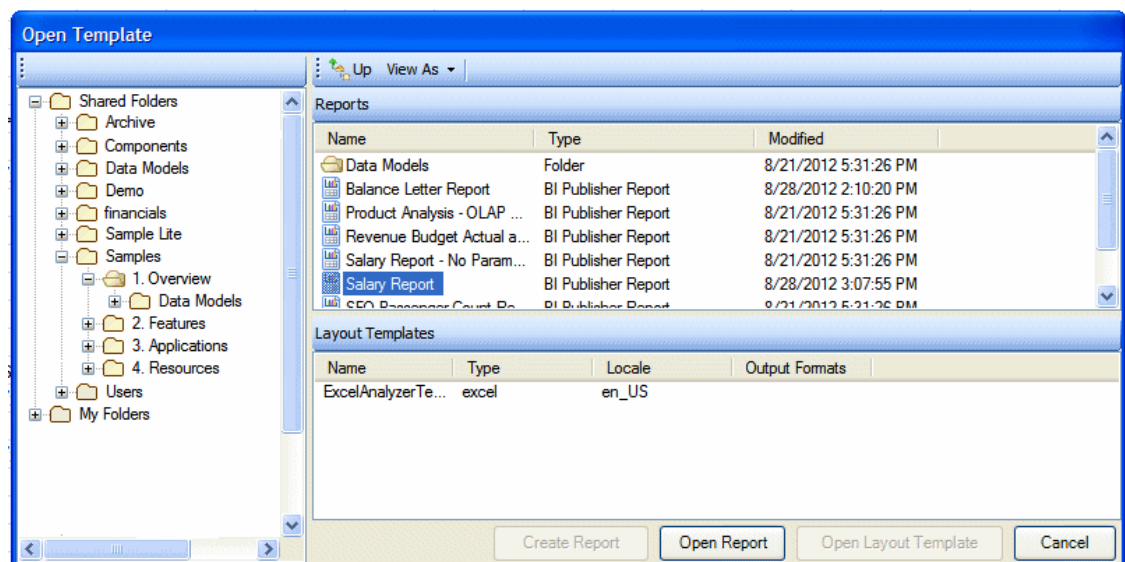


- **Log Off** - ends the connection to Publisher.
- **Open** - enables interaction with the Publisher catalog.
- **View Report** - executes the data model on the server and returns live results to view in your template. If the data model includes parameters, you are prompted to enter values.
- **Upload Template/Upload Template As** - uploads the template to the Publisher catalog.

## Access the Publisher Catalog from the Template Builder

The **Open** online command enables interaction with the Publisher catalog.

The **Open** command launches the Open Template dialog to enable access to the Publisher catalog.



Navigate the catalog folders to locate the report, data model, or existing layout template. From this dialog you can initiate one of the following actions:

- Modify an existing Excel template.

When you select a report in the **Reports** region, any existing Excel templates or Excel Analyzer templates (deprecated) are displayed in the lower **Layout Templates** region. To modify an existing template, select the template name and click **Open Layout Template**. The Template Builder loads the sample data from the report's data model and opens the existing template in Excel.

- Create a new template for an existing report.

Select the report name in the **Reports** region and click **Open Report**. The Template Builder loads the sample data for this report's data model.

- Select a data model to create a new report.

When you select a data model from the catalog, the **Create Report** button is enabled. Click **Create Report** and you are prompted to enter a report name and select the location in the catalog to save the new report.

## Upload Templates from the Template Builder

A link to upload templates is provided if you are online with the server.

If you've maintained the connection during the design process, click one of the following to upload your completed template to the Publisher server:

- **Upload Template** uploads your edited template and replaces the existing template in the catalog. **Upload Template** is enabled only when you've opened an existing template from the Open Template dialog using the **Open Layout Template** button.
- **Upload Template As** prompts you to assign a **Template Name** and **Locale** to the template then uploads the file to the report in the Publisher catalog.

## Work in Disconnected Mode

When direct connection to Publisher isn't possible or practical, you can use the Template Builder to design and preview templates in disconnected mode.

In disconnected mode the commands in the **Online** group are not enabled. The process flow for working in disconnected mode is:

1. Log in to Publisher and download sample data from the data model for which you want to design a template.
2. Open Excel with the Publisher Template Builder for Excel Add-in installed.
3. Load the sample data to the Template Builder.
4. Design your template in Excel.
5. Preview your template using the **Preview** command.
6. Log in to Publisher and use the report editor to upload your template.

## Obtain Sample Data

The Template Builder requires sample data to insert the data field mappings to your template.

If you do not have access to the report data model, but you can access the report, then you can alternatively save sample data from the report viewer.

To save data from the report viewer:

1. In the catalog, navigate to the report.
2. Click **Open** to run the report in the report viewer.
3. Click the **Actions** menu, then click **Export**, then click **Data**. You are prompted to save the XML file.
4. Save the file to a local directory.

## Load Sample Data in Disconnected Mode

You can load sample data into a local directory while offline.

Once you've saved the sample data from the report data model to a local directory, load it to the Template Builder.

1. Open Excel with the PublisherTemplate Builder for Excel Add-in installed.
2. On the Publisher tab, in the Load Data group, click **Sample XML**. You're prompted to locate and select the data from its saved location. A confirmation message confirms the data is loaded.

## Upload Templates to the Report

You can upload report templates while offline.

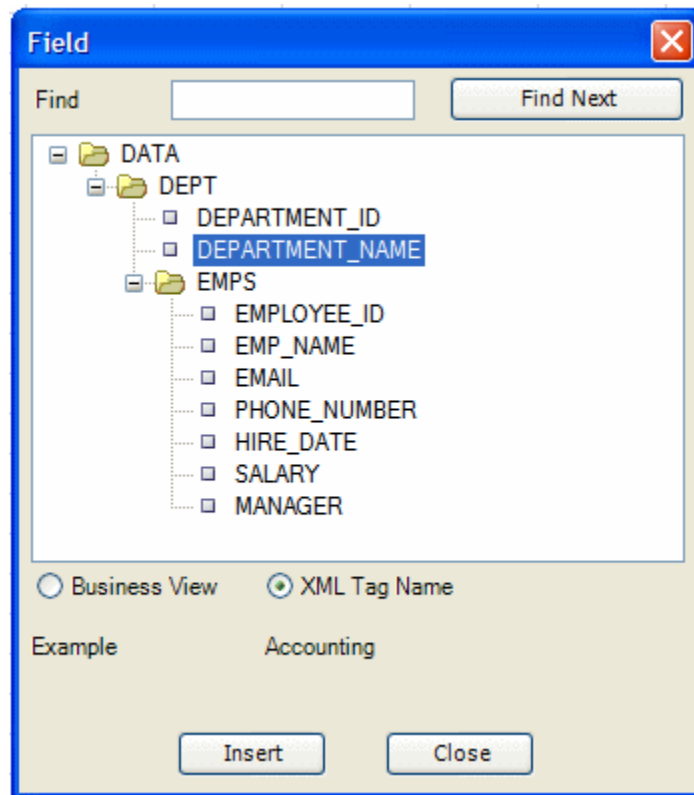
When working in disconnected mode, upload the template to the report editor following the instructions in [Add a Layout by Uploading a Template File](#).

## Insert Fields

The **Field** command in the **Insert** group maps data elements from the loaded sample data to the desired location in the spreadsheet.

The maximum number of fields you can add using Template Builder to an Excel template is 990.

1. In Excel, select the cell to which to map the data element.
2. On the Publisher tab, in the **Insert** group, click **Field**. The Field dialog launches, displaying the data elements from your sample data.
3. On the Field dialog select the element to insert to the cell. Notice that as you select items in the data structure, sample data is displayed in the Example region as shown in the following illustration.



4. Click **Insert** to insert the data element to the cell in the spreadsheet. Sample data is inserted to the cell.

When you insert a field, the Template Builder creates a mapping between the data and the cell by assigning a unique Excel defined name to the cell and mapping the data element to that defined name. The mapping is written to the XDO\_METADATA sheet as shown in the following illustration.

When the Template Builder inserts the field it assigns a defined name to the cell

Employee Name	Employee ID	Email	Telephone	Salary
Shelley Higgins	205	SHIGGINS	515.123.8080	

and creates a mapping in the hidden XDO\_METADATA sheet between the named cell and the element from your data.

	A	B	C	D
1	Version			
2	ARU-dbdv			
3	Extractor Version			
4	Template Code			
5	Template Type	TYPE_EXCEL_TEMPLATE		
6	Preprocess XSLT File			
7	Last Modified Date			
8	Last Modified By			
9				
10	Data Constraints:			
11	XDO_?XDOFIELD1?	<?DEPARTMENT_NAME?>		
12				
13				

Note that the XDO\_METADATA sheet is hidden by default.

## More Features of the Field Dialog

The Field dialog provides the following features.

### Find

For an XML document with a large and complicated structure, use the find functionality to find a specific field. Enter all or part of the field name into the **Find** field and click **Find Next**.

### Business View or XML Tag Name View

When working in connected mode, you can choose whether to view the data structure using the Business View names or the XML Tag Names as defined in the data model. Business View names are user-friendly names defined for the data elements in the data model editor. This option isn't available if sample data has been loaded from a locally stored file or when the data model doesn't include Business View names.

## Insert Repeating Groups

You can insert repeating groups of cell elements.

To insert a repeating group:

1. Select the cells in the spreadsheet that contain the elements you want repeated.
2. On the Publisher menu, in the Insert group, click **Repeating Group**.
3. Enter the appropriate fields in the Publisher Properties dialog.
4. When you've completed the dialog options, click OK to insert the Publisher code to define the groupings. An Excel defined name is assigned to the cell range using the Publisher syntax `XDO_GROUP_?name?` and the code is written to the `XDO_METADATA` sheet as shown in the following illustration.

	A	B	C
1	Version		
2	ARU-dbdv		
3	Extractor Version		
4	Template Code		
5	Template Type	TYPE_EXCEL_TEMPLATE	
6	Preprocess XSLT File		
7	Last Modified Date		
8	Last Modified By		
9			
10	Data Constraints:		
11	XDO_GROUP_?XDOG1?	<xsl:for-each-group select="//DEPT" group-by="//DEPARTMENT_ID">	</xsl:for-each-group>
12			
13			

## Use the Field Browser to View, Edit, and Delete Fields

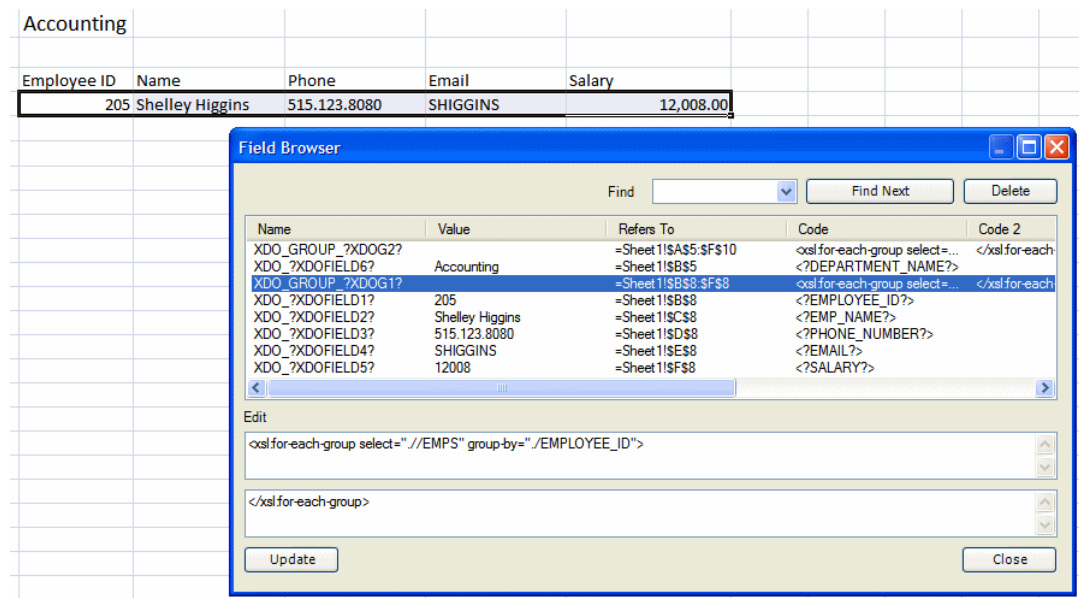
The Field Browser enables you to view and edit the code inserted by the Template Builder and the code you inserted manually into the `XDO_METADATA` sheet.

When you select a line of code in the Field Browser, the corresponding cells in the template are highlighted, so you know which field you are editing, deleting, or viewing.

To edit or delete a field using the Field Browser:

1. On the Publisher menu, in the **Tools** group, click **Field Browser**.
2. The Field Browser displays the Publisher commands that are present in the template. Select the field or command to view. The code for the selected command displays in the lower **Edit** region. Notice that if the code has opening and ending tags (such as the opening and ending tags of a repeating group) the opening tag display in the upper code box and the closing tag displays in the lower code box.

When you select a command, the area of the template that corresponds to the code is highlighted. In the following illustration the repeating group is selected in the Field Browser and the corresponding fields are highlighted in the template.



- To delete the code, click **Delete**. To edit the code, update the code displayed in the Edit and click **Update**.
- When finished, click **Close** to close the Field Browser.

## Preview Templates

Use the preview feature of the Template Builder to test your template before uploading it to Publisher.

To preview a template with the loaded sample data:

- On the Publisher tab in the Preview group, click **Excel**.

The sample data is applied to the template and the output document is opened in a new workbook.

If you're working in connected mode, you can test your template with live data from the report data model using **View Report**.

To view your template using live data:

- On the Publisher tab in the Online group, click **View Report**.

The Template Builder sends a request to execute the data model in Publisher and returns the data to apply to the template. If the data model requires parameters, you're prompted to enter values. The output document is opened in a new Excel workbook.

## Import Excel Analyzer Templates

The Excel Analyzer feature of Publisher has been deprecated, but if you have Excel Analyzer templates from previous Publisher releases, you can use the Import command of the Excel Template Builder to import an Excel Analyzer template and convert it to an Excel template. The Import command supports only Excel Analyzer templates created using the Offline Mode.

To import an Excel Analyzer template:

- Open the Excel Analyzer template. If you're working in connected mode, navigate to the report that contains the template you wish to convert. When you select the report in the Open Template dialog, the Excel Analyzer template displays in the Layout Templates



region as type "excel". Click **Open Layout Template** to open the Excel Analyzer template in Excel.

2. Click Import. A message notifies you: This feature will overwrite your template.
3. Click OK.

The Template Builder converts the Excel Analyzer template to an Excel template.

## Build a Basic Template Using the Template Builder

This section demonstrates the concepts of Excel templates by describing the steps to create a simple Excel template using the Excel Template Builder.

This procedure follows these steps:

- [Step 1: Load Sample Data to the Template Builder](#)
- [Step 2: Design the Layout in Excel](#)
- [Step 3: Use the Template Builder to Insert Fields](#)
- [Step 4: Use the Template Builder to Insert Repeating Groups](#)
- [Step 5: Insert the Calculated Salary Field](#)
- [Step 6: Test the Template](#)

### Step 1: Load Sample Data to the Template Builder

Loading sample data provides a properly formatted base from which to build a template.

The method you choose for loading sample data depends on whether you are working in connected or disconnected mode.

- To load data when working in connected mode, see [Access the Publisher Catalog from the Template Builder](#).
- To load data when working in disconnected mode, see [Load Sample Data in Disconnected Mode](#).

The sample data for this example is a list of employees by department. Note that employees are grouped and listed under the department.

```
<?xml version="1.0" encoding="UTF-8"?>
<!-- Generated by Oracle BI Publisher 11.1.1.4.0 -->
<DATA>
  <DEPT>
    <DEPARTMENT_ID>20</DEPARTMENT_ID>
    <DEPARTMENT_NAME>Marketing</DEPARTMENT_NAME>
    <EMPS>
      <EMPLOYEE_ID>201</EMPLOYEE_ID>
      <EMP_NAME>Michael Hartstein</EMP_NAME>
      <EMAIL>MHARTSTE</EMAIL>
      <PHONE_NUMBER>515.123.5555</PHONE_NUMBER>
      <HIRE_DATE>1996-02-17T00:00:00.000+00:00</HIRE_DATE>
      <SALARY>13000</SALARY>
    </EMPS>
  </DEPT>
  <DEPT>
    <EMPLOYEE_ID>202</EMPLOYEE_ID>
    <EMP_NAME>Pat Fay</EMP_NAME>
    <EMAIL>PFAY</EMAIL>
    <PHONE_NUMBER>603.123.6666</PHONE_NUMBER>
```

```

    <HIRE_DATE>1997-08-17T00:00:00.000+00:00</HIRE_DATE>
    <SALARY>6000</SALARY>
  </EMPS>
</DEPT>
<DEPT>
...
...
</DEPT>
</DATA>

```

To build the template described in this tutorial, use the sample data available in the Samples folder installed with BI Publisher Desktop. A very similar dataset can be found in <Install Directory>\BI Publisher Desktop\Template Builder for Word\samples\Excel templates\Employee By Departments\EmpByDept Single Sheets\EmpbyDeptExcelData.xml

## Step 2: Design the Layout in Excel

Use Excel to simplify a design layout.

In Excel, determine how you want to render the data and create a sample design, as shown in the following illustration.

	A	B	C	D	E	F
1	<b>Employees by Department Report</b>					
2						
3						
4						
5	Department:	Administration				
6						
7	Employee Name	Employee ID	Email	Telephone	Salary	
8	Jennifer Whalen	200	JWHALEN	515-123-4444	10,000.00	
9					10,000.00	
10						
11						

The design shows a department name and a row for each employee within the department. You can apply Excel formatting to the design, such as font style, shading, and alignment. Note that this layout includes a total field. The value for this field isn't available in the data and requires a calculation.

## Step 3: Use the Template Builder to Insert Fields

You can map data to data fields in the template.

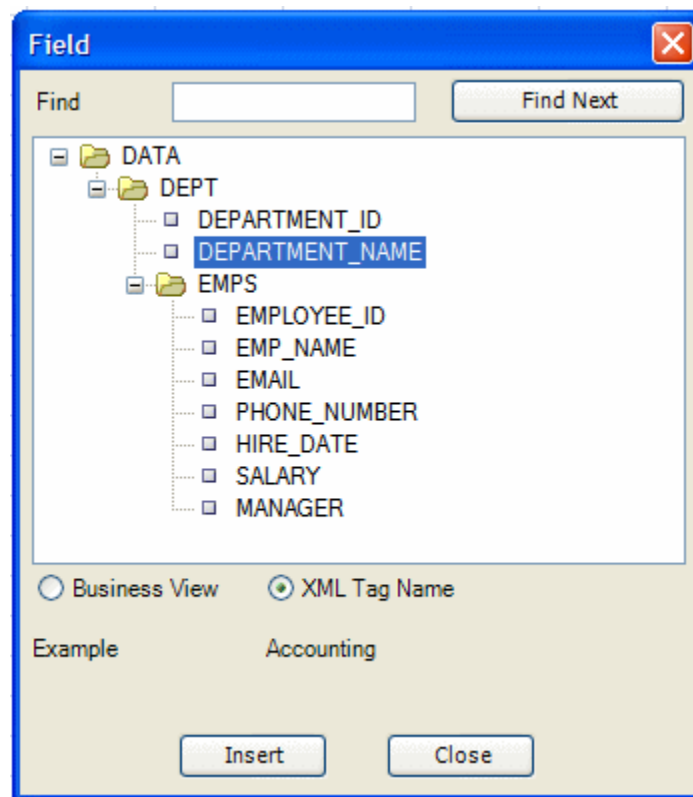
In this layout design, the following fields must be mapped to the template from the data:

Field in Layout	Element in Data
Department	DEPARTMENT_NAME
Employee Name	EMP_NAME

Field in Layout	Element in Data
Employee ID	EMPLOYEE_ID
Email	EMAIL
Telephone	PHONE_NUMBER
Salary	SALARY

To insert field mappings using the Template Builder:

1. Select the cell in the spreadsheet where the data field is to display. For example, to map the DEPARTMENT\_NAME element, select cell B5.
2. On the Publisher tab, in the **Insert** group click **Field**. (Because this is the first field you are inserting, a message displays stating that the metadata sheet will be created.) The Field dialog displays showing the data structure, shown in the following illustration.



3. Select the element in the Field dialog and click **Insert**. Sample data is inserted to the cell in the template.
4. Repeat for the Employee Name, Employee ID, Email, Telephone, and Salary fields in the template.

## Step 4: Use the Template Builder to Insert Repeating Groups

A group is a set of data that repeats for each occurrence of a particular element.

In the sample template design, there're two groups:

- For each occurrence of the <EMPS> element, the employee's data (name, e-mail, telephone, salary) is displayed in the worksheet.

- For each occurrence of the <DEPT> element, the department name and the list of employees belonging to that department are displayed.

In other words, the employees are "grouped" by department and each employee's data is "grouped" by the employee element. To achieve this in the final report, insert a repeating group around the cells that are to repeat for each grouping element.

Note that the data must be structured according to the groups that you want to create in the template. The structure of the data for this example

```
<DATA>
  <DEPT>
    <EMPS>
```

establishes the grouping desired for the report.

To insert the repeating group for Employees:

- Select the cells that make up the group. In this example, the first group is the Employee data that makes up a row in the table, the cells are A8 - E8.
- On the Publisher tab, in the **Insert** group, click **Repeating Group**.
- In the Properties dialog, select the following:
  - From the **For Each** list, select EMPS.
  - From the **Group By** list, select EMPLOYEE\_ID.

To insert the repeating group for Departments:

- To define the department group, select the Department name cell and all the employee fields beneath it (A5-E9) as shown in the following illustration.

:DO_GROUP_?DEPT?    fx    Department:					
	A	B	C	D	E
1	<b>Employees by Department Report</b>				
2					
3					
4					
5	Department:	Administration			
6					
7	Employee Name	Employee ID	Email	Telephone	Salary
8	Jennifer Whalen	200	JWHALEN	515-123-4444	10,000.00
9					10,000.00
10					

- On the Publisher tab, in the **Insert** group, click **Repeating Group**. Notice that the total salary cell is included in the department group to ensure that it repeats at the department level.
- In the Properties dialog, select the following:
  - From the **For Each** list, select DEPT.
  - From the **Group By** list, select DEPARTMENT\_ID.

## Step 5: Insert the Calculated Salary Field

Finally, insert the second Salary field that is to be an aggregated sum for each department.

To insert the calculated field:

1. Select the cell in the spreadsheet where the calculated salary is to display. In this example, the cell is E9.
2. On the Publisher tab, in the group, click **Field** to display the dialog.
3. Select the SALARY element and click **Insert** to insert the mapping in the template.
4. Open the XDO\_METADATA sheet.

The Template Builder created a hidden XDO\_METADATA sheet when you inserted the first field. Unhide the sheet in your workbook by right-clicking Sheet1 and selecting **Unhide** from the menu.

The following illustration shows the XDO\_METADATA sheet for the sample template.

	A	B	C	D	E
1	Version				
2	ARU-dbdv				
3	Extractor Version				
4	Template Code				
5	Template Type	TYPE_EXCEL_TEMPLATE			
6	Preprocess XSLT File				
7	Last Modified Date				
8	Last Modified By				
9					
10	Data Constraints:				
11	XDO_?XDOFIELD1?	<?DEPARTMENT_NAME?>			
12	XDO_?XDOFIELD2?	<?EMP_NAME?>			
13	XDO_?XDOFIELD3?	<?EMPLOYEE_ID?>			
14	XDO_?XDOFIELD4?	<?EMAIL?>			
15	XDO_?XDOFIELD5?	<?PHONE_NUMBER?>			
16	XDO_?XDOFIELD6?	<?SALARY?>			
17	XDO_?XDOFIELD7?	<?SALARY?>			
18	XDO_GROUP_?XDOG1?	<xsl:for-each-group select="."/></xsl:for-each-group>			
19	XDO_GROUP_?XDOG2?	<xsl:for-each-group select="."/></xsl:for-each-group>			
20					

The total salary field maps to the cell named XDO\_?XDOFIELD7?.

5. In Column B enter the calculation as an XPATH function. To calculate the sum of the SALARY element for all employees in the group, enter the following: <?sum(./SALARY)?>. The entry is shown in the following illustration.

	A	B	C	D	E
1	Version				
2	ARU-dbdv				
3	Extractor Version				
4	Template Code				
5	Template Type	TYPE_EXCEL_TEMPLATE			
6	Preprocess XSLT File				
7	Last Modified Date				
8	Last Modified By				
9					
10	Data Constraints:				
11	XDO_?XDOFIELD1?	<?DEPARTMENT_NAME?>			
12	XDO_?XDOFIELD2?	<?EMP_NAME?>			
13	XDO_?XDOFIELD3?	<?EMPLOYEE_ID?>			
14	XDO_?XDOFIELD4?	<?EMAIL?>			
15	XDO_?XDOFIELD5?	<?PHONE_NUMBER?>			
16	XDO_?XDOFIELD6?	<?SALARY?>			
17	XDO_?XDOFIELD7?	<?sum(../SALARY)?>			
18	XDO_GROUP_?XDOG1?	<xsl:for-each-group select="." </xsl:for-each-group>			
19	XDO_GROUP_?XDOG2?	<xsl:for-each-group select="." </xsl:for-each-group>			
20					

## Step 6: Test the Template

You can test a template using Preview.

To preview a template with the loaded sample data:

- On the Publisher tab in the group, click **Excel**.

The sample data is applied to the template and the output document is opened in a new workbook.

1	<b>Employees by Department Report</b>				
2					
3					
4					
5	Department:	Marketing			
6					
7	Employee Name	Employee ID	Email	Telephone	Salary
8	Michael Hartstein	201	MHARTSTE	515.123.5555	13,000.00
9	Pat Fay	202	PFAY	603.123.6666	6,000.00
10					19,000.00
11	Department:	Purchasing			
12					
13	Employee Name	Employee ID	Email	Telephone	Salary
14	Den Raphaely	114	DRAPHEAL	515.127.4561	11,000.00
15	Alexander Khoo	115	AKHOO	515.127.4562	3,100.00
16	Shelli Baida	116	SBAIDA	515.127.4563	2,900.00
17	Sigal Tobias	117	STOBIAS	515.127.4564	2,800.00
18	Guy Himuro	118	GHIMURO	515.127.4565	2,600.00
19	Karen Colmenares	119	KCOLMENA	515.127.4566	2,500.00
20					24,900.00
21	Department:	Human Resources			
22					
23	Employee Name	Employee ID	Email	Telephone	Salary
24	Susan Mavris	203	SMAVRIS	515.123.7777	6,500.00
25					6,500.00

## Format Dates

Excel cannot recognize canonical date format. If the date format in the XML data is in canonical format, that is, YYYY-MM-DDThh:mm:ss+HH:MM, you must apply a function to display it properly.

One option to display a date is to use the Excel REPLACE and SUBSTITUTE functions. This option retains the full date and timestamp. If you only require the date portion in the data (YYY-MM-DD), then another option is to use the DATEVALUE function. The following example shows how to use both options.

### Example: Formatting a Canonical Date in Excel

Using the Employee by Department template and data from the first example, this procedure adds the HIRE\_DATE element to the layout and displays the date as shown in Column E of the following figure:

	A	B	C	D	E	F
1	<b>Employees by Department Report</b>					
2						
3						
4						
5	<b>Department:</b> Admin					
6						
7	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Salary</b>
8	John Thomas	100001	john@oracle.com	111-333-3333	3-Feb-96	10,000
9						10,000
10						
11						
12						

To format the date:

1. Add a column to the table in your layout for HIRE\_DATE.
2. In the table row where the data is to display, use the Template Builder to insert the HIRE\_DATE field.

If you are not using the Template Builder, copy and paste a sample value for HIRE\_DATE from the XML data into the cell that is to display the HIRE\_DATE field. For example: Copy and paste 1996-02-03T00:00:00.000-07:00 into the E8 cell. Assign the cell the defined name XDO\_?HIRE\_DATE? to map it to the HIRE\_DATE element in the data. The inserted field is shown in the following figure:

XDO_?HIRE_DATE?      fx 1996-02-03T00:00:00.000-07:00						
	A	B	C	D	E	F
1	<b>Employees by Department Report</b>					
2						
3						
4						
5	<b>Department:</b> Admin					
6						
7	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Salary</b>
8	John Thomas	100001	john@oracle.com	111-333-3333	1996-02-03T00:00:00.000	10,000
9						10,000
10						

If you do nothing else, the HIRE\_DATE value is displayed as shown. To format the date as "3-Feb-96", you must apply a function to that field and display the results in a new field.

3. Insert a new Hire Date column. This is now column F, as shown in the following figure:



	A	B	C	D	E	F	G
1	<b>Employees by Department Report</b>						
2							
3							
4							
5	<b>Department:</b> Admin						
6							
7	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Hire Date</b>	<b>Salary</b>
8	John Thomas	100001	john@oracle.com	111-333-3333	1996-02-03T00:00:00.000		10,000
9							10,000
10							

4. In the new Hire Date cell (F8), enter one of the following Excel functions:

- To retain the full date and timestamp, enter:

```
=--REPLACE(SUBSTITUTE(E8,"T"," "),LEN(E8)-6,6,"")
```

- To retain only the date portion (YYY-MM-DD), enter:

```
=DATEVALUE(LEFT(E8,10))
```

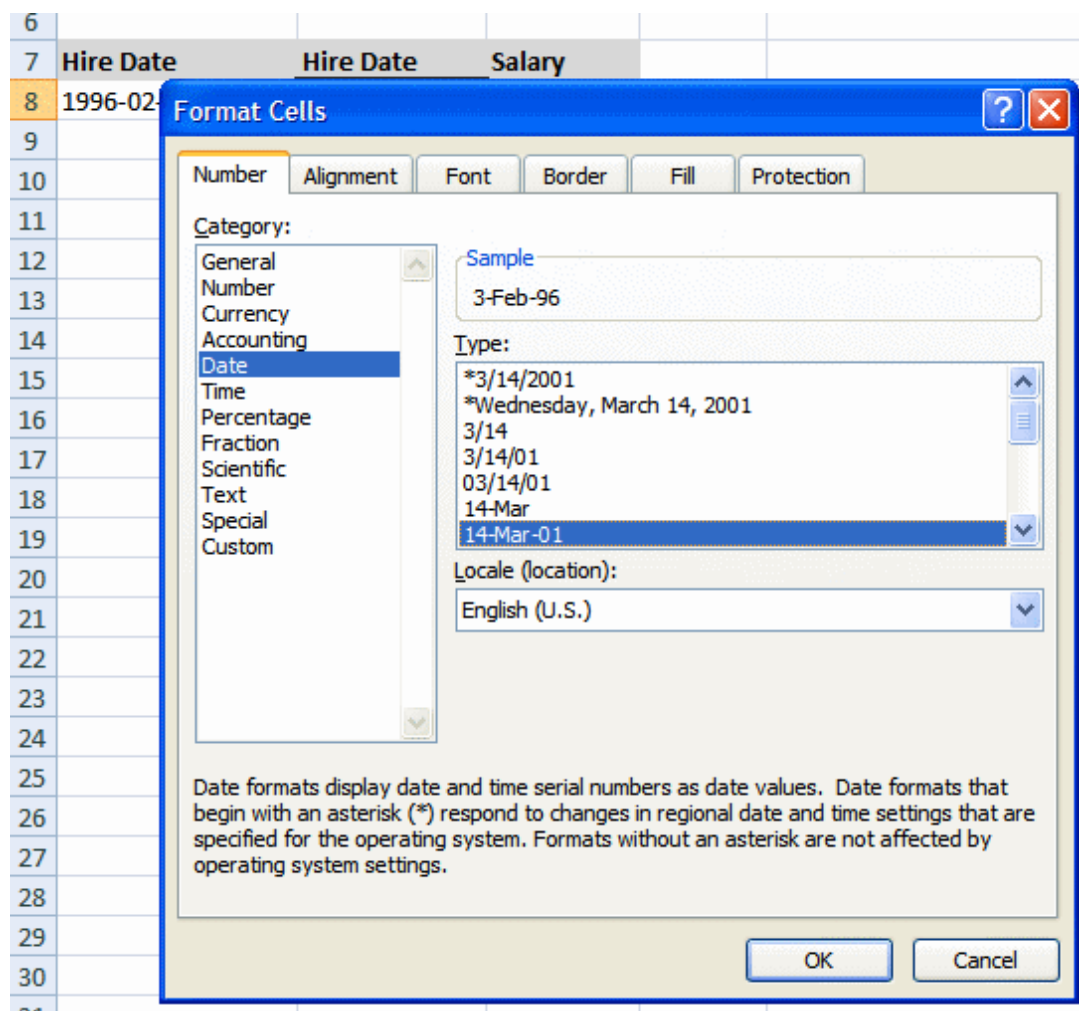
Notice that in both functions, "E8" refers to the cell that contains the value to convert.

After you enter the function, it populates the F8 cell as shown in the following figure:

F8            =--REPLACE(SUBSTITUTE(E8,"T"," "),LEN(E8)-6,6,"")							
EmployeeByDept_chr.xls [Compatibility Mode]							
	A	B	C	D	E	F	G
1	<b>Employees by Department Report</b>						
2							
3							
4							
5	<b>Department:</b> Admin						
6							
7	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Hire Date</b>	<b>Salary</b>
8	John Thomas	100001	john@oracle.com	111-333-3333	1996-02-03T00:00:00.000	35098	10,000
9							10,000
10							

5. Apply formatting to the cell.

Right-click the F8 cell. From the menu, select **Format Cells**. In the Format Cells dialog, select **Date** and the desired format, as shown in the following figure.



The sample data in the F8 cell now displays as 3-Feb-96.

6. Hide the E column, so that report consumers do not see the canonical date that is converted.

The following figure shows the template with column E hidden:

	A	B	C	D	F	G	H
1	<b>Employees by Department Report</b>						
2							
3							
4							
5	<b>Department:</b>	Admin					
6							
7	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Salary</b>	
8	John Thomas	100001	john@oracle.com	111-333-3333	3-Feb-96	10,000	
9						10,000	
10							
11							
12							
13							

## Understand Excel Template

Similar to RTF template design, Excel template design follows the paradigm of mapping fields from the XML data to positions in the Excel worksheet.

Excel templates make use of features of Excel in conjunction with special Publisher syntax to achieve this mapping. In addition to direct mapping of data elements, Excel templates support more complex formatting instructions by defining the cell ranges and the commands in a separate worksheet designated to contain these commands. This sheet is called the XDO\_METADATA sheet.

## Map Data Fields and Groups

Excel templates use named cells and groups of cells to enable Publisher to insert data elements.

Cells are named using Publisher syntax to establish the mapping back to the XML data. The cell names are also used to establish a mapping within the template between the named cell and calculations and formatting instructions defined on the XDO\_METADATA sheet.

The template content and layout must correspond to the content and hierarchy of the XML data file used as input to the report. Each group of repeating elements in the template must correspond to a parent-child relationship in the XML file. If the data isn't structured to match the desired layout in Excel, you can regroup the data using XSLT preprocessing or the grouping functions. However, for the best performance and least complexity it's recommended that the data model be designed with the report layout in mind.

## Use Excel Defined Names for Mapping

Publisher uses the Excel defined names feature to identify data fields and repeating elements.

A defined name in Excel is a name that represents a cell, range of cells, formula, or constant value.

The Template Builder for Excel automatically creates the defined names when you use it to insert fields and repeating groups. You can also insert the defined names manually. The defined names used in the Excel template must use the syntax described in this chapter and follow the Microsoft guidelines described in the Microsoft Excel help document. Note that Publisher defined names are within the scope of the template sheet.

When you create an Excel Template manually (that is, NOT using the Publisher Desktop Excel Template Builder), you must provide default values for all marked up cells XDO\_?. The default values must match to the data type of the report data XML file. Without default values for the XDO\_? cells, the output cells generated from those template cells may lose formatting and the result is unpredictable. If you use Publisher Desktop to create an Excel Template, the default values are automatically supplied with the first row of sample data in the report data file.

## Use "XDO\_" Prefix to Create Defined Names

The Publisher defined names are Excel defined names identified by the prefix "XDO\_".

Creating the defined name with the Publisher code in the template creates the connection between the position of the code in the template and the XML data elements, and also maintains the ability to dynamically grow data ranges in the output reports, so that these data ranges can be referenced by other formula calculations, charts, and macros.

## Use Native Excel Functions with the "XDO\_" Defined Names

You can use the XDO\_ defined names in Excel native formulas as long as the defined names are used in a simple table.

When a report is generated, Publisher automatically adjusts the region ranges for those named regions so that the formulas calculate correctly.

However, if you create nested groups in the template, then the cells generated in the final report within the grouping can no longer be properly associated to the correct name. In this case, the use of XDO\_ defined names with native Excel functions cannot be supported.

## About the XDO\_METADATA Sheet

Each Excel template requires a sheet within the template workbook called "XDO\_METADATA".

Publisher uses this sheet in the template in the following ways:

- To identify the template as an Excel template.
- To insert the code for the field and group mappings you create with the Template Builder.

As the template designer, you also use this sheet to specify more advanced calculations and processing instructions to perform on fields or groups in the template. Publisher provides a set of functions to provide specific report features. Other formatting and calculations can be expressed in XSLT.

## Create the XDO\_METADATA Sheet

When you begin the design of a new Excel template using the Template Builder, the first time you use one of the **Insert** functions the Template Builder automatically creates a hidden XDO\_METADATA sheet. A message informs you that the sheet has been created.

Publisher creates the sheet as a hidden sheet. Use the Excel Unhide command to view and edit the XDO\_METADATA sheet.

## Format of the XDO\_METADATA Sheet

The XDO\_METADATA sheet is created with the format shown in this figure. The format consists of two sections: the header section and the data constraints section. Both sections are required.

	A	B	C
1	Version		
2	ARU-dbdv		
3	Extractor Version		
4	Template Code		
5	Template Type	TYPE_EXCEL_TEMPLATE	
6	Preprocess XSL Template		
7	Last Modified Date		
8	Last Modified By		
9			
10	Data Constraints:		
11			
12			

In the header section, all the entries in column A must be listed, but a value is required for only one: Template Type, as shown. The entries in Column A are:

- Version
- ARU-dbdv
- Extractor Version
- Template Code
- Template Type
- Preprocess XSLT File
- Last Modified Date
- Last Modified By

The Data Constraints section is used to specify the data field mappings and other processing instructions. Details are provided in the following sections.

## Hide the XDO\_METADATA Sheet

Oracle recommends that you hide the XDO\_METADATA sheet before uploading the completed template to the Publisher catalog to prevent its inclusion in the final report output. Use the `Excel Hide` command to hide the sheet before uploading the template to the server.

## Enable Excel Template Scalability

Enable Excel template scalability to process large data to output reports in Excel format.

If you try to publish reports with large amounts of data as Excel spreadsheets, you might encounter memory issues because the limit of an Excel sheet is 65536 rows. If you enable an Excel template to scale, that template divides a large amount of data into multiple sheets, which helps to avoid memory issues. You can enable Excel template scalability at the system level, the report level, or the Excel template level. The template level setting overrides the report level setting, and the report level setting overrides the system level setting. To ensure backward compatibility, Excel template scalability is set to false by default.

An Excel template that's enabled to scale does the following to avoid memory issues:

- Flows data into multiple sheets when the data size is more than 65536 rows in a table.
- Flushes memory of every N rows after those N rows are processed for rendering the Excel report.

By default, the flush cell size = 3000 \* 100 (rows \* columns).  $N = 3000 * 100 / \text{Actual\_columns\_in\_your\_Excel\_template\_sheet}$

You can override this flush cell size by specifying the flush cell size (XDO\_FLUSH\_CELLSIZE\_? *flush\_cell\_size*) below the "Data Constraints:" line in the XDO\_METADATA sheet in the Excel template. An XDO\_GROUP table might not work properly if the final report size of an XDO\_GROUP table is greater than the flush cell size.

- Releases the memory used for each sheet after processing the data in the sheet.

## Enable Excel Template Scalability at the Template Level

You can enable scalability in an Excel template to avoid running out of memory while publishing large amounts of data to an Excel spreadsheet.

To enable Excel template scalability at the template level:

1. Open the Excel template.
2. Select the XDO\_METADATA sheet in the Excel template.
3. Below the "Data Constraints:" line, enter XDO\_SCALABLE\_? in Column A, and type true in column B.

## Enable Excel Template Scalability at the System Level

As an administrator, you can set a runtime property to enable scalability for all Excel templates.

To enable Excel template scalability at the system level:

1. As an administrator, navigate to the Runtime Configuration page.
2. Scroll down to view the Excel template properties.
3. Set the **Enable Scalable Mode** property to true.

## Enable Excel Template Scalability at the Report Level

As a report author, you can set a report level property to enable scalability for the Excel template used by the report.

To enable Excel template scalability at the report level:

1. Open the report for edit.
2. Click **Properties** to open the Report Properties dialog.
3. Click the **Formatting** tab and scroll down to view the Excel template properties.
4. Set the **Enable Scalable Mode** property to true.

## Use Advanced Publisher Functions

Publisher provides a set of functions to achieve additional reporting functionality.

You define these functions in the Data Constraints region of the XDO\_METADATA sheet.

The functions make use of Columns A, B, and C in the XDO\_METADATA sheet as follows:

Use Column A to declare the function or to specify the defined name of the object to which to map the results of a calculation or XSL evaluation.

Use Column B to enter the special XDO-XSL syntax to describe how to control the data constraints for the XDO function, or the XSL syntax that describes the special constraint to apply to the XDO\_ named elements.

Use Column C to specify additional instructions for a few functions.

The functions are described in the following sections:

- [Reporting Functions](#)
- [Format Functions That Rely on Specific Data Attribute Values](#)
- [Group Functions](#)

## Reporting Functions

You can add functions to a template using the commands shown and a combination of Publisher syntax and XSL.

A summary list of the commands is shown in the following table. See the corresponding section for details on usage.

Function	Commands
<a href="#">Split Data from Reports into Multiple Sheets</a>	XDO_SHEET_? with XDO_SHEET_NAME_?
<a href="#">Declare and Pass Parameters</a>	XDO_PARAM_?n?
<a href="#">Define a Link</a>	XDO_LINK_?link object name?
<a href="#">Import and Call a Subtemplate</a>	XDO_SUBTEMPLATE_?n?
<a href="#">Reference Java Extension Libraries</a>	XDO_EXT_?n?

## Split Data from Reports into Multiple Sheets

You can define the logic to split the data from a report into multiple sheets.

You can't span images across multiple sheets. If the template sheet includes images, when the data splits into multiple sheets, the images are displayed only on the first sheet. Use this set of commands to split the report data into multiple sheets:

- XDO\_SHEET\_? command to define the logic to split the data onto a new sheet.
- XDO\_SHEET\_NAME\_? command to specify the naming convention for each sheet.

In the XDO\_METADATA sheet, you can specify multiple templates to create multiple sheets. For each template, define a pair of XDO\_SHEET\_? and XDO\_SHEET\_NAME\_? commands. Make sure you define the same original template sheet name for each pair of XDO\_SHEET\_? and XDO\_SHEET\_NAME\_? commands.

The following table describes the column entries.

Column A Entry	Column B Entry	Column C Entry
XDO_SHEET_?	<p>&lt;?xsl_evaluation to split the data?&gt;</p> <p>Example:</p> <p>&lt;?//DEPT?&gt;</p>	<p>&lt;?original sheet name?&gt;</p> <p>Example:</p> <p>&lt;?Sheet2?&gt;</p>
XDO_SHEET_NAME_?	<p>&lt;?xsl_expression to name the sheet?&gt;</p> <p>Example:</p> <p>&lt;?concat(//DEPARTMENT_NAME,'-',count(//EMP_NAME))?&gt;</p>	<p>&lt;?original sheet name?&gt;</p> <p>Example:</p> <p>&lt;?Sheet2?&gt;</p>

1. In column A, enter the XDO\_SHEET\_? and XDO\_SHEET\_NAME\_? commands.
2. In column B:
  - The XDO\_SHEET\_? command must refer to an existing high-level node in the XML data. In the example, <?//DEPT?> creates a new sheet for each occurrence of <DEPT> in the data. If the data is flat, then you can't use this command unless you first preprocess the data to create the desired hierarchy. To preprocess the data, define the

transformation in an XSLT file, then specify this file in the Preprocess XSLT File field of the header section of the XDO\_METADATA sheet.

- The XDO\_SHEET\_NAME\_? command must define the name to apply to the sheets. Enter the XSL expression to derive the new sheet name. The expression can reference a value for an element or attribute in the XML data, or you can use the string operation on those elements to define the final sheet name. The following example names each sheet using the value of DEPARTMENT\_NAME concatenated with "-" and the count of employees in the DEPT group.

```
<?concat(../DEPARTMENT_NAME,'-',count(../EMP_NAME))?>
```

3. In column C, specify the name of the original template sheet. For example, if you have a report that contains summary data in the first three worksheets and the burst data is in Sheet2 and Sheet3, specify <?Sheet2?> as the original template sheet name for the first pair of XDO\_SHEET\_? and XDO\_SHEET\_NAME\_? commands and specify <?Sheet3?> for the second pair of commands. If you do not specify the template sheet name for either XDO\_SHEET\_? or XDO\_SHEET\_NAME\_? commands, Publisher doesn't take any action for the definition pair.

### Example: Splitting the data into multiple sheets

Using employee data, this example:

- Lists the employees of each department in separate sheets.
  - Creates a new worksheet for each department.
  - Names each worksheet the name of the department. For example, Marketing.
- Lists the first 100 employees in separate sheets for the departments of the first 100 employees.
  - Creates a new worksheet for each department to which the first 100 employees belong.
  - Names each worksheet the name of the department with the number of employees with employee ID less than 100 in that department. For example, Human Resources-3 if three employees in the Human Resources department have employee ID less than 100.

To split the data into sheets:

1. Enter the defined names for each cell of employee data and create the group for the repeating employee data, as shown in the following illustration. Do not create the grouping around the department because the data is split by department.
2. Enter the values in the Data Constraints section of the XDO\_METADATA sheet.

The entries are shown in the following illustration.



	A	B	C
1	Version		
2	ARU-dbdv		
3	Extractor Version		
4	Template Code		
5	Template Type	TYPE_EXCEL_TEMPLATE	
6	Preprocess XSL Template		
7	Last Modified Date		
8	Last Modified By		
9			
10	Data Constraints:		
11	XDO_SHEET_?	<?./DEPT?>	<?Sheet2?>
12	XDO_SHEET_Name_?	<?//DEPARTMENT_NAME?>	<?Sheet2?>
13	XDO_?TOTAL_SALARY?	<?sum(./SALARY)?>	<?Sheet2?>
14	XDO_SHEET_?	<?./EMPID<=100?>	<?Sheet3?>
15	XDO_SHEET_Name_?	<?concat(./DEPARTMENT_NAME,'-',count(./EMP_NAME))?>	<?Sheet3?>
16			
17			

Sheet1 XDO\_METADATA

The following illustration shows the generated report. The data for each department is displayed on its own sheet, which is named per the specified convention.

	A	B	C	D	E	F
1						
2						
3	Department:	Purchasing				
4						
5	Employee Name	Employee ID	Email	Telephone	Hire Date	Salary
6	Sharon Dean	118	SDEAN	213-546-1449	1-Dec-93	4575
7	Tim Jones	114	TJONES	213-546-1436	5-Nov-93	3500
8	James Hardley	99	JHARDL	213-546-1438	7-Aug-93	3800
9	Mark Karen	24	MKAREN	213-546-1437	12-Feb-92	4500
10	Lily Alex	106	LALEX	213-546-1444	1-Oct-93	2700
11	Sandy Larry	119	SLARRY	213-546-1445	1-Dec-93	3950
12						23025
13						
14						
15						

Administration Marketing Purchasing Human Res ...

	A	B	C	D	E	F
1						
2						
3	Department:	Human Resources				
4						
5	Employee Name	Employee ID	Email	Telephone	Hire Date	Salary
6	Lisa James	96	LJAMES	213-546-1456	5-Jul-93	2500
7	George Henry	88	GHENRY	213-546-1450	15-Jan-93	2800
8	Marina Lewis	57	MLEWIS	213-546-1455	24-Apr-92	3500
9						
10						

Marketing\_2 Human Resources\_3

## Declare and Pass Parameters

To define a parameter, use the `XDO_PARAM_?n?` function to declare the parameter, then use the `$parameter_name` syntax to pass a value to the parameter. A parameter must be defined in the data model.

Column A Entry	Column B Entry
<code>XDO_PARAM_?n?</code> where <i>n</i> is the unique identifier for the parameter	<code>&lt;?param@begin;parameter_name;parameter_value?&gt;</code> where <i>parameter_name</i> is the name of the parameter from the data model and <i>parameter_value</i> is the optional default value. For example: <code>&lt;?param@begin:Country;US?&gt;</code>

To use the value of the parameter directly in a cell, refer to the parameter as `$parameter_name` in the definition for the XDO\_ defined name, as described in the following table.

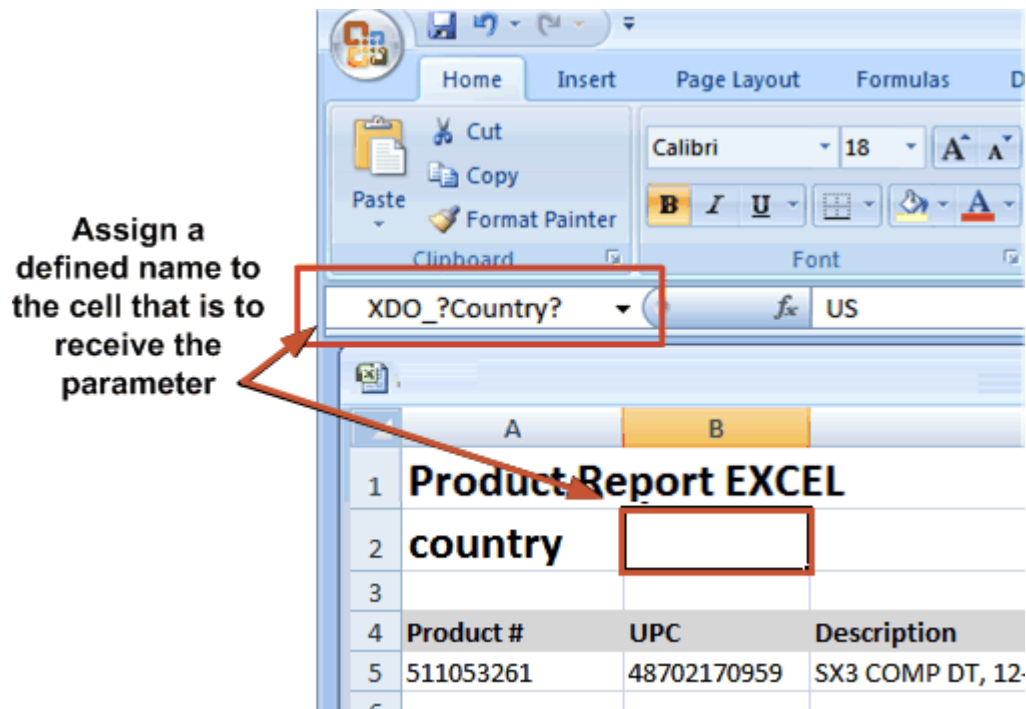
Column A Entry	Column B Entry
<code>XDO_PARAM_?parameter_name?</code> For example: <code>XDO_PARAM_?Country?</code>	<code>&lt;?\$parameter_name?&gt;</code> For example: <code>&lt;?\$Country?&gt;</code>

You can also refer to the parameter in other logic or calculations in the XDO\_METADATA sheet using `$parameter_name`.

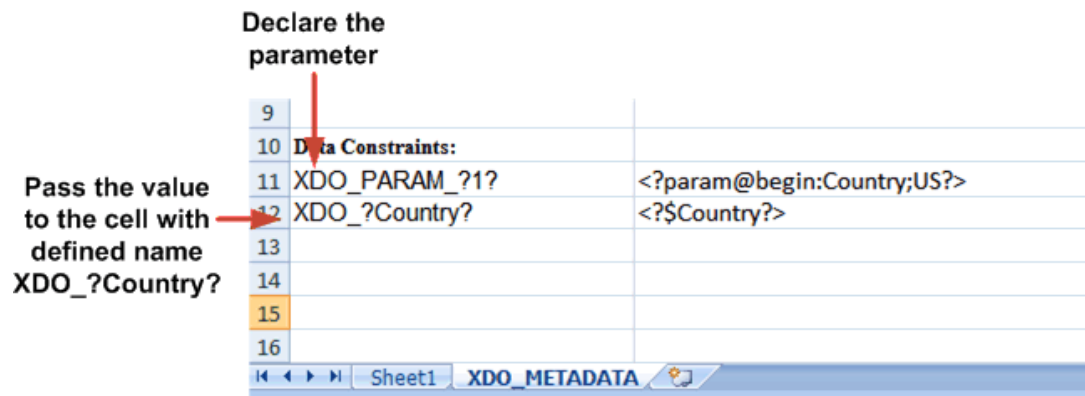
### Example 15-1 Example: Define and pass a parameter

To declare and reference a parameter named Country:

1. In the template sheet, mark the cell with a defined name. In the following figure, the cell has been marked with the defined name `XDO_?Country?`



- In the hidden sheet assign that cell the parameter value, as shown in the following figure:



## Define a Link

Use the XDO\_LINK\_? command to define a hyperlink for any data cell, as described in this table.

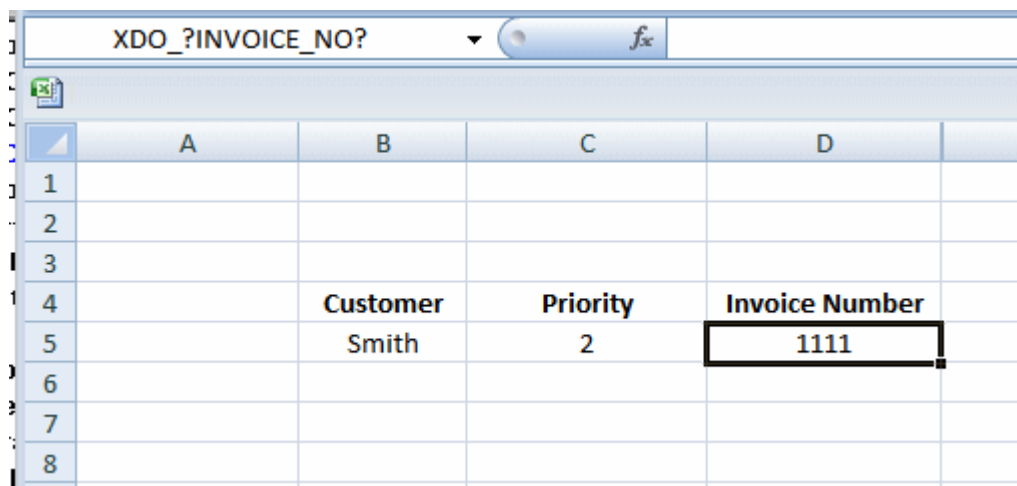
### Example: Define a Link

Column A Entry	Column B Entry
XDO_LINK_?cell object name?	<xsl statement to build the dynamic URL>
For example:	For example:
XDO_LINK_?INVOICE_NO?	<xsl:value-of select="concat('https://server.company.com/documents/invoice_print.show?c_rptno=',./INVOICE_NO)"/>

Assume your company generates customer invoices. The invoices are stored in a central location accessible by a Web server and can be identified by the invoice number (INVOICE\_NO).

### To generate a report that creates a dynamic link to each invoice:

- In the template sheet, assign the cell that is to display the INVOICE\_NO the XDO defined name: XDO\_?INVOICE\_NO?, as shown in the following figure:



2. In the XDO\_METADATA sheet, enter the appropriate values, as described:
  - Column A entry: XDO\_LINK\_?INVOICE\_NO?
  - Column B entry: `<xsl:value-of select="concat('https://server.company.com/documents/invoice_print.show?c_rptno=',./INVOICE_NO)"/>`

The entries in the Excel are shown in the following figure:

10	Data Constraints:	
11	XDO_LINK_?INVOICE_NO?	<code>&lt;xsl:value-of select="concat('https://server.company.com/documents/invoice_print.show?c_rptno=',./INVOICE_NO)"/&gt;</code>
12		

The report output is displayed as shown in the following figure. The logic that is defined in the XDO\_METADATA sheet is applied to create a hyperlink for each INVOICE\_NO entry.

Customer	Priority	Invoice Number
Aaron	3	<a href="#">5952174</a>
Abner	3	<a href="#">8280605</a>
Acheson	2	<a href="#">7604618</a>
Addison	3	<a href="#">9645172</a>
Aeschelle	3	<a href="#">9616238</a>
Agers	2	<a href="#">9685385</a>
Ahab	3	<a href="#">9644915</a>
Aiden	3	<a href="#">9663648</a>
Ajackal	3	<a href="#">9685016</a>
Akkers	3	<a href="#">9706403</a>
DZIMA	3	<a href="#">9645249</a>
CGUO	3	<a href="#">9706193</a>

## Import and Call a Subtemplate

Use these commands to declare XSL subtemplates that you can then call and reference in any of the XDO\_ commands.

The Template Builder for Excel doesn't support preview for templates that import subtemplates. To import the subtemplate, enter the command shown in the following table:

Column A Entry	Column B Entry
XDO_SUBTEMPLATE_?n? where <i>n</i> is a unique identifier. For example: XDO_SUBTEMPLATE_?1?	<code>&lt;xsl:import href="xdoxsl:///path to subtemplate.xsb"/&gt;</code> For example: <code>&lt;xsl:import href="xdoxsl:///Shared Folders/Financial Reports/SubTemplates/MySubTemplate.xsb"/&gt;</code>

To call the subtemplate, declare the cell name for which the results should be returned in Column A, then enter the call-template syntax with any other XSL processing to be performed. The commands are shown in the following table:

Column A Entry	Column B Entry
XDO_?cell object name?	<xsl:call-template name="template_name"> </xsl:call-template>

For more information on XSL subtemplates and creating the subtemplate object in the catalog, see [Design XSL Subtemplates](#).

### Example: Importing and Calling a Subtemplate

Assume you have the following subtemplate uploaded to the catalog as PaymentsSummary-SubTemplate.xsb. This subtemplate evaluates the value of a parameter named pPayType and based on the value, returns a string that indicates the payment type:

```
<?xml version="1.0" encoding="utf-8"?>
<xsl:stylesheet version="2.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:template match="/">
    </xsl:template>
    <xsl:template name="BRM_PAY_TYPES">
      <xsl:param name="pPayType" select="string('ALL')"/>
      <xsl:choose>
        <xsl:when test="$pPayType = '0'">UNDEFINED</xsl:when>
        <xsl:when test="$pPayType=string('10000')">PREPAID</xsl:when>
        <xsl:when test="$pPayType=string('10001')">INVOICE</xsl:when>
        <xsl:when test="$pPayType=string('10003')">CREDIT CARD</xsl:when>
        <xsl:when test="$pPayType=string('10005')">DIRECT DEBIT</xsl:when>
        <xsl:when test="$pPayType=string('10011')">CASH</xsl:when>
        <xsl:when test="$pPayType=string('10012')">CHECK</xsl:when>
        <xsl:when test="$pPayType=string('ALL')">ALL</xsl:when>
      </xsl:choose>
    </xsl:template>
  </xsl:stylesheet>
```

In the Excel template, you've defined a field with the XDO Defined Name XDO\_?TYPE?, which is populated based on the string returned from code performed in the subtemplate, as shown in the following figure:

XDO\_?TYPE?

fxPREPAID

	A	B	C	D
1				
2				
3				
4				
5				
6	Start Date:	03/29/2000 04:16:21	Account Status:	CLOSED
7	End Date:	04/27/2030 04:16:21	Payment Type:	PREPAID
8	Country:			
9	State:			
10				

Enter the commands shown in the following table in the Data Constraints region.

Column A Entry	Column B Entry
XDO_SUBTEMPLATE_?1?	<xsl:import href="xdoxsl:///Shared Folders/Financial Reports/SubTemplates/PaymentsSummary-SubTemplate.xsb"/>
XDO_?TYPE?	<xsl:call-template name="BRM_PAY_TYPES"> <xsl:with-param name="pPayType" select="string('10000')"/> </xsl:call-template>

The XDO\_SUBTEMPLATE\_?1? function imports the subtemplate from the catalog.

The XDO\_?TYPE? cell entry maps the results of the subtemplate processing entered in Column B.

## Reference Java Extension Libraries

You can include the reference to a Java extension library in the template and then call methods from this library to perform processing in the template.

Use the command shown in the following table to reference the Java extension libraries.

Column A Entry	Column B Entry
XDO_EXT_?n? where <i>n</i> is a unique identifier. Example: XDO_EXT?1?	<?namespace:xmlns:bipext="extension library"?> Example: <?namespace:xmlns:bipext="http://www.example.com/XSL/Transform/java/example.com.xmlpublisher.reports.BIPEExtension"?>

You can have multiple extension libraries defined in a single template file.

### Example: Calling a Java Extension Library

Assume the extension library includes the following two methods that you want to call in the template:

- bipext:infTimeToStr()
- bipext:infStrToTimet()

After you've declared the library as shown above, specify the cell to which you want to apply the method by entering the XDO defined name in Column A and calling the function in Column B. The following table shows example commands.

Column A Entry	Column B Entry
XDO_?PARAM_START_DATE?	<xsl:value-of select="bipext:infTimeToStr(bipext:infStrToTimet((// PARAM_START_DATE)[1],2),3)"

The entries in the XDO\_METADATA sheet to declare and call the Java extension libraries are shown in the following illustration.

10	<b>Data Constraints:</b>	
11	XDO_EXT_?1?	<?namespace:xmlns:bipext="http://www.oracle.com/XSL/Transform/java/oracle.com.xmlpublisher.reports.BIPExtension"?>
12	XDO_?PARAM_START_DATE?	<xsl:value-of select="bipext:infTimeToStr(bipext:infStrToTime(../../PARAM_START_DATE)[1], 2), 3)"
13		

## Format Functions That Rely on Specific Data Attribute Values

The commands in this table require that specific formatting attributes be present in the XML data file.

A summary list of the commands is shown in the following table. See the corresponding section for details on usage.

Function	Command
<a href="#">Define Border and Underline Styles</a>	XDO_STYLE_n_?cell object name?
<a href="#">Skip a Row</a>	XDO_SKIPROW_?cell object name?

## Define Border and Underline Styles

While you can define a consistent style in the template using Excel formatting, the XDO\_STYLE command enables you to define a different style for any data cell dynamically based on the XML data.

With the XDO\_STYLE command you specify the cell to which to apply the style, the logic to determine when to apply the style, and the style type to apply. The style value must be present in the XML data. The following table provides examples.

Column A Entry	Column B Entry	Column C Entry
XDO_STYLE_n_?cell_object_name?	<xsl evaluation that returns a supported value>	Style type
For example:	For example:	For example:
XDO_STYLE_1_?TOTAL_SALARY?	<xsl:value-of select="//TOTAL_SALARY/@borderStyle"/>	BottomBorderStyle

Publisher supports the normal Excel style types and values as shown in the following table:

Style Type	Supported Values (Must be in returned by evaluation in Column B)	Supported Types (Enter in Column C)
Normal	BORDER_NONE BORDER_THIN BORDER_MEDIUM BORDER_DASHED BORDER_DOTTED BORDER_THICK BORDER_DOUBLE BORDER_HAIR BORDER_MEDIUM_DASHED BORDER_DASH_DOT BORDER_MEDIUM_DASH_DOT BORDER_DASH_DOT_DOT BORDER_MEDIUM_DASH_DOT_DOT BORDER_SLANTED_DASH_DOT	BottomBorderStyle TopBorderStyle LeftBorderStyle RightBorderStyle DiagonalLineStyle

You can also set a color using one of the types shown in the following table:

Style Type	Supported Value (Must be in returned by evaluation in Column B)	Supported Types (Enter in Column C)
Normal	When you set Color Style, give the value in RRBBGG hex format, for example: borderColor="0000FF"	BottomBorderColor TopBorderColor LeftBorderColor RightBorderColor DiagonalLineColor

Publisher also supports the underline type with the values shown in the following table:

Style Type	Supported Values (Must be in returned by evaluation in Column B)	Supported Type (Enter in Column C)
Underline	UNDERLINE_NONE UNDERLINE_SINGLE UNDERLINE_DOUBLE UNDERLINE_SINGLE_ACCOUNTING UNDERLINE_DOUBLE_ACCOUNTING	UnderlineStyle

You can have multiple underline styles defined for a single cell.

### Example: Defining Styles

To apply a style in a template, the style value must be present in the data. In this example, a border style and an underline style are applied to the DEPT\_TOTAL\_SALARY field shown in the Excel template.

For this example, the following data is used. Note that the DEPT\_TOTAL\_SALARY element in the data has these attributes defined:

- borderStyle
- underLineStyle



- borderColor

The value of each of these attributes is used to apply the defined style based on logic defined in the template.

```
<?xml version="1.0" encoding="UTF-8"?>

<EMPLOYEES>
  <G_DEPT>
    <DEPARTMENT_ID>10</DEPARTMENT_ID>
    <DEPARTMENT_NAME>Administration</DEPARTMENT_NAME>
    <LIST_G_EMP>
      <G_EMP>
        <EMPLOYEE_ID>200</EMPLOYEE_ID>
        <EMP_NAME>Jennifer Whalen</EMP_NAME>
        <EMAIL>JWHALEN</EMAIL>
        <PHONE_NUMBER>515.123.4444</PHONE_NUMBER>
        <HIRE_DATE>1987-09-17T00:00:00.000-06:00</HIRE_DATE>
        <SALARY>4400</SALARY>
      </G_EMP>
    </LIST_G_EMP>

    <DEPT_TOTAL_SALARY borderStyle="BORDER_DOUBLE"
underLineStyle="UNDERLINE_DOUBLE_ACCOUNTING" borderColor="0000FF">4400</
DEPT_TOTAL_SALARY>
  </G_DEPT>
  <G_DEPT>
    <DEPARTMENT_ID>20</DEPARTMENT_ID>
    <DEPARTMENT_NAME>Marketing</DEPARTMENT_NAME>
    <LIST_G_EMP>
      <G_EMP>
        <EMPLOYEE_ID>201</EMPLOYEE_ID>
        <EMP_NAME>Michael Hartstein</EMP_NAME>
        <EMAIL>MHARTSTE</EMAIL>
        <PHONE_NUMBER>515.123.5555</PHONE_NUMBER>
        <HIRE_DATE>1996-02-17T00:00:00.000-07:00</HIRE_DATE>
        <SALARY>13000</SALARY>
      </G_EMP>
      <G_EMP>
        <EMPLOYEE_ID>202</EMPLOYEE_ID>
        <EMP_NAME>Pat Fay</EMP_NAME>
        <EMAIL>PFAY</EMAIL>
        <PHONE_NUMBER>603.123.6666</PHONE_NUMBER>
        <HIRE_DATE>1997-08-17T00:00:00.000-06:00</HIRE_DATE>
        <SALARY>6000</SALARY>
      </G_EMP>
    </LIST_G_EMP>

    <DEPT_TOTAL_SALARY borderStyle="BORDER_DOUBLE"
underLineStyle="UNDERLINE_DOUBLE_ACCOUNTING" borderColor="0000FF">19000</
DEPT_TOTAL_SALARY>
  </G_DEPT>

  ...

</EMPLOYEES>
```

**To define a style:**

1. In the Excel template, assign the defined name XDO\_?DEPT\_TOTAL\_SALARY? to the field that is to display the DEPT\_TOTAL\_SALARY from the data, as shown in the following figure:

	A	B	C	D	F	G
1	<b>Employees by Department Report</b>					
2						
3						
4						
5	<b>Department:</b>	Admin				
6						
7	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Salary</b>
8	John Thomas	100001	john@oracle.com	111-333-3333	3-Feb-96	10,000
9						10,000
10						
11						

2. In the XDO\_METADATA sheet, enter the following:

- To define the top border style, use these entries:
  - Column A entry: XDO\_STYLE\_1\_?DEPT\_TOTAL\_SALARY?
  - Column B entry: <xsl:value-of select="//DEPT\_TOTAL\_SALARY/@borderStyle"/>
  - Column C entry: TopBorderStyle

The entry in Column A maps this style command to the cell assigned the name XDO\_?DEPT\_TOTAL\_SALARY?

The entry in Column B retrieves the style value from the attribute borderStyle of the DEPT\_TOTAL\_SALARY element. Note from the sample data that the value for borderStyle is "BORDER\_DOUBLE".

The entry in Column C tells Publisher to apply a TopBorderStyle to the cell.

- To define the top border color, use these entries:
  - Column A entry: XDO\_STYLE\_2\_?DEPT\_TOTAL\_SALARY?
  - Column B entry: <?//DEPT\_TOTAL\_SALARY/@borderColor?>
  - Column C entry: TopBorderColor

The entry in Column A maps this style command to the cell assigned the name XDO\_?DEPT\_TOTAL\_SALARY?

The entry in Column B retrieves the style value from the attribute borderColor of the DEPT\_TOTAL\_SALARY element. Note from the sample data that the value for borderColor is 0000FF (blue).

The entry in Column C tells Publisher to apply a TopBorderColor to the cell.

- To define the underline style, use these entries:
  - Column A entry: XDO\_STYLE\_3\_?DEPT\_TOTAL\_SALARY?

- Column B entry: `<?./DEPT_TOTAL_SALARY/@underLineStyle?>`
- Column C entry: UnderLineStyle

The entry in Column A maps this style command to the cell assigned the name XDO\_?DEPT\_TOTAL\_SALARY?

The entry in Column B retrieves the style value from the attribute underLineStyle of the DEPT\_TOTAL\_SALARY element. Note from the sample data that the value for underLineStyle is UNDERLINE\_DOUBLE\_ACCOUNTING.

The entry in Column C tells Publisher to apply the UnderLineStyle to the cell.

The following figure shows the three entries in the Data Constraints region:

9			
10	<b>Data Constraints:</b>		
11	XDO_STYLE_1_?DEPT_TOTAL_SALARY?	<code>&lt;xsl:value-of select="./DEPT_TOTAL_SALARY/@borderStyle"/&gt;</code>	TopBorderStyle
12	XDO_STYLE_2_?DEPT_TOTAL_SALARY?	<code>&lt;?./DEPT_TOTAL_SALARY/@borderColor?&gt;</code>	TopBorderColor
13	XDO_STYLE_3_?DEPT_TOTAL_SALARY?	<code>&lt;?./DEPT_TOTAL_SALARY/@underLineStyle?&gt;</code>	UnderLineStyle
14			
15			

When you run the report, the style commands are applied to the XDO\_?DEPT\_TOTAL\_SALARY? cell, as shown in the following figure:

	A	B	C	D	F	G
1	<b>Employees by Department Report</b>					
2						
3						
4						
5	<b>Department:</b>	Administration				
6						
7	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Salary</b>
8	Jennifer Whalen	200	JWHALEN	515.123.4444	17-Sep-87	4,400
9						4,400
10	<b>Department:</b>	Marketing				
11						
12	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Salary</b>
13	Michael Hartstein	201	MHARTSTE	515.123.5555	17-Feb-96	13,000
14	Pat Fay	202	PFAY	603.123.6666	17-Aug-97	6,000
15						19,000
16	<b>Department:</b>	Purchasing				
17						
18	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Salary</b>
19	Shelli Baida	116	SBaida	515.127.4563	24-Dec-97	2,900
20	Sigal Tobias	117	STOBIAS	515.127.4564	24-Jul-97	2,800
21	Karen Colmenare	119	KCOLMENEA	515.127.4566	10-Aug-99	2,500
22	Alexander Khoo	115	AKHOO	515.127.4562	18-May-95	3,100
23	Guy Himuro	118	GHIMURO	515.127.4565	15-Nov-98	2,600
24	Den Raphaely	114	DRAPHEAL	515.127.4561	7-Dec-94	11,000
25						24,900
26	<b>Department:</b>	Human Resources				

## Skip a Row

Use the XDO\_SKIPROW command to suppress the display of a row of data in a table when the results of an evaluation defined in Column B return the case insensitive string "True".

Example entries are shown in the following table.

Column A Entry	Column B Entry
XDO_SKIPROW_?cell_object_name?	<xsl:evaluation that returns the string "True"/>
For example:	For example:
XDO_SKIPROW_?EMPLOYEE_ID?	<xsl:if test="string-length(/EMPLOYEE_ID/@MANAGER) != 0"> <xsl:value-of select="/EMPLOYEE_ID/@MANAGER"/> </xsl:if>

### Example: Skip a Row Based on Data Element Attribute

In this example, the Excel template suppresses the display of the row of employee data when the EMPLOYEE\_ID element includes a "MANAGER" attribute with the value "True".

Assume data as shown below. Note that the EMPLOYEE\_ID element for employee Michael Hartstein has the MANAGER attribute with the value "True". The other EMPLOYEE\_ID elements in this set do not have the attribute.

```
<?xml version="1.0" encoding="UTF-8"?>

<EMPLOYEES>
  <G_DEPT>
    <DEPARTMENT_ID>20</DEPARTMENT_ID>
    <DEPARTMENT_NAME>Marketing</DEPARTMENT_NAME>
    <LIST_G_EMP>
      <G_EMP>
        <EMPLOYEE_ID MANAGER="TRUE">201</EMPLOYEE_ID>
        <EMP_NAME>Michael Hartstein</EMP_NAME>
        <EMAIL>MHARTSTE</EMAIL>
        <PHONE_NUMBER>515.123.5555</PHONE_NUMBER>
        <HIRE_DATE>1996-02-17T00:00:00.000-07:00</HIRE_DATE>
        <SALARY>13000</SALARY>
      </G_EMP>
      <G_EMP>
        <EMPLOYEE_ID>202</EMPLOYEE_ID>
        <EMP_NAME>Pat Fay</EMP_NAME>
        <EMAIL>PFAY</EMAIL>
        <PHONE_NUMBER>603.123.6666</PHONE_NUMBER>
        <HIRE_DATE>1997-08-17T00:00:00.000-06:00</HIRE_DATE>
        <SALARY>6000</SALARY>
      </G_EMP>
      <G_EMP>
        <EMPLOYEE_ID>652</EMPLOYEE_ID>
        <EMP_NAME>William Morgan</EMP_NAME>
        <EMAIL>WMORGAN</EMAIL>
        <PHONE_NUMBER>219.123.7776</PHONE_NUMBER>
        <HIRE_DATE>1994-10-17T00:00:00.000-06:00</HIRE_DATE>
        <SALARY>8000</SALARY>
      </G_EMP>
    </LIST_G_EMP>
  </G_DEPT>

  ...

</EMPLOYEES>
```

To suppress the display of the row of the employee data when the MANAGER attribute is set to "True", enter the entries shown in the following table in the Data Constraints section.

Column A Entry	Column B Entry
XDO_SKIPROW_?EMPLOYEE_ID?	<xsl:if test="string-length(/EMPLOYEE_ID/@MANAGER) != 0"> <xsl:value-of select="/EMPLOYEE_ID/@MANAGER"/> </xsl:if>

The output from this template is shown in the following illustration. Note that the employee Michael Hartstein isn't included in the report.

	A	B	C	D	F	G	
1	<b>Employees by Department Report</b>						
2							
3							
4							
5	<b>Department:</b>	Marketing					
6							
7	<b>Employee Name</b>	<b>Employee ID</b>	<b>Email</b>	<b>Telephone</b>	<b>Hire Date</b>	<b>Salary</b>	
8	Pat Fay	202	PFAY	603.123.6666	17-Aug-97	6,000	
9	William Morgan	652	WMORGAN	219.123.7776	17-Oct-94	8,000	
10						<u>14,000</u>	
11							

## Group Functions

Use the functions shown in this table to create groupings of data in the template.

Function	Command
<a href="#">Group Data</a>	XDO_GROUP_?group element?
<a href="#">Regroup the Data</a>	XDO_REGROUP_?

## Group Data

Use the XDO\_GROUP command to group flat data when the layout requires a specific data grouping, for example, to split the data across multiple sheets.

Example entries are shown in the following table:

Column A Entry	Column B Entry	Column C Entry
XDO_GROUP_?group element?	<xsl beginning grouping logic/>	<xsl ending grouping tags/>
For example:	For example:	For example:
XDO_GROUP_?	<xsl:for-each-group select="current-group()"	</xsl:for-each> <xsl:for-each-
STATE_GROUP?	group-by="./STATE"> <xsl:for-each-group	group> <xsl:for-each-group>
	select="current-group()" group-by="./	
	RESOURCE_NAME"> <xsl:for-each	
	select="current-group()">	

Define the XSL statements to be placed at the beginning and ending of the section of the group definition marked up by XDO\_?cell object name?. You can mark multiple groups nested in the template, giving each the definition appropriate to the corresponding group.

## Handle the Generated XDO Define Names in Nested Groups

When XDO\_GROUP\_? is used in a nested group, the ranges of XDO define names in the final report become meaningless. In this case, don't refer to the define names in formulas in the final report. You can disable the XDO markup activity in the final report using the command XDO\_MARKUP\_?.

The following table shows the usage of XDO\_MARKUP\_? in the XDO\_METADATA sheet:

Column A Entry	Column B Entry
XDO_MARKUP_?	"false" or "FALSE" (The cell must be formatted as Text in the Excel Format Cells dialog.)

In addition, if your template includes a large number of defined names and these are used in multiple levels of nested groups, Excel may not be able to handle the number of generated defined names. In this case, use the XDO\_MARKUP\_? command to disable markup for the generated report.

When set to false, Publisher doesn't produce any defined names for any result produced by XDO\_GROUP\_?

## Regroup the Data

The XDO\_REGROUP regroups the data by declaring the structure using the defined names.

The XDO\_REGROUP logic is a shortened form of the XDO\_GROUP logic and doesn't require the XSLTcoding requirements in the XDO\_METADATA sheet. The definition must therefore be directly on XDO\_REGROUP\_? define names, or on any other definition on the XDO\_METADATA sheet. Entries are shown in the following table.

Column A Entry	Column B Entry
XDO_REGROUP_?	<p>XDO_REGROUP_?UniqueGroupID?levelName? groupByName?sortByName?sortByName?sortByName? where</p> <ul style="list-style-type: none"> <li>UniqueGroupID is the ID of the group. It can be the same as the levelName or you can assign it a unique name.</li> <li>levelName is the XML level tag name in the XML data file or XDO_CURRGRP_ that represents the current-group() in the context of nested grouping. XDO_CURRGRP_ should be used for all inner groups when more than one nesting group exists in your template.</li> <li>groupByName is the field name that you want to use for the GroupBy operation for the current group. This name can be empty if the XDO_REGROUP_? command is used for the most inner group.</li> <li>sortByName is the field name that you want to sort the group by. You can have multiple sortBy fields. If no sortByName is declared, then the data from the XML file isn't sorted.</li> </ul>

The next three tables show an example of how to create three nested groupings.

Column A Entry	Column B Entry
XDO_REGROUP_?	XDO_REGROUP_?PAYMENTSUMMARY_Q1? PAYMENTSUMMARY_Q1?PAY_TYPE_NAME?

In the definition shown in the previous table, the most outer group is defined as PAYMENTSUMMARY\_Q1, and it's grouped by PAY\_TYPE\_NAME

Column A Entry	Column B Entry
XDO_REGROUP_?	XDO_REGROUP_?COUNTRYGRP?XDO_CURRGRP_? COUNTRY?

The definition shown in the previous table creates a second outer group. The group is assigned the name COUNTRY\_GRP and it's grouped by the element COUNTRY.

Column A Entry	Column B Entry
XDO_REGROUP_?	XDO_REGROUP_?STATEGRP?XDO_CURRGRP_?STATE?

The definition shown in the previous table creates the inner group STATEGRP and it includes a sortByName parameter: STATE.

## Preprocess the Data Using an XSL Transformation (XSLT) File

For the best performance, design the data model to perform as much of the data processing as possible. When you can't get the required output from the data engine, you can preprocess the data using an XSLT file that contains the instructions to transform the data.

Some sample use cases include:

- To create groups to establish the necessary hierarchy to support the desired layout.
- To add style attributes to data elements.
- To perform complex data processing logic that may be impossible in the Excel Template or undesirable for performance reasons. The Template Builder for Excel doesn't support preview for templates that require XSLT preprocessing.

To use an XSLT preprocess file:

1. Create the file and save as .xsl.
2. Upload the file to the report definition in the Publisher catalog, as you would a template:
  - a. Navigate to the report in the catalog.
  - b. Click **Edit**.
  - c. Click **Add New Layout**.
  - d. Click **Upload**.
  - e. Complete the fields in the Upload dialog and select **XSL Stylesheet (HTML/XML/Text)** as the template **Type**.
  - f. After upload, click **View a List**. Deselect **Active**, so that users do not see this template as an option when they view the report.
 

For testing purposes, you might want to maintain the XSL template as active to enable you to view the intermediate data when the template is applied to the data. After testing is complete, set the template to inactive.
  - g. Save the report definition.
3. In the Excel template, on the XDO\_METADATA sheet, in the Header section, enter the file name for the **Preprocess XSLT File** parameter. For example: splitByBrand.xsl.



## XSLT Preprocessing Examples: Split Flat Data into Multiple Sheets

This topic presents two examples of using an XSLT preprocess file to group flat data so that it can be split into multiple sheets in Excel.

The examples are:

- [Split the Data by a Specific Field](#)
- [Split the Data by Count of Rows](#)

Splitting the data by row count is an option when your report data exceeds the sheet row size of Excel 2003 (65,536 rows per sheet).

Both examples use the following XML data:

```
<ROWSET>
  <ROW>
    <Products.Type>COATINGS</Products.Type>
    <Products.Brand>Enterprise</Products.Brand>
    <Markets.Region>CENTRAL REGION</Markets.Region>
    <Markets.District>CHICAGO DISTRICT</Markets.District>
    <Periods.Year>2000</Periods.Year>
    <Measures.Dollars>1555548.0</Measures.Dollars>
  </ROW>
  <ROW>
    <Products.Type>COATINGS</Products.Type>
    <Products.Brand>Enterprise</Products.Brand>
    <Markets.Region>EASTERN REGION</Markets.Region>
    <Markets.District>NEW YORK DISTRICT</Markets.District>
    <Periods.Year>2000</Periods.Year>
    <Measures.Dollars>1409228.0</Measures.Dollars>
  </ROW>
  ...
</ROWSET>
```

### Split the Data by a Specific Field

This example demonstrates how to use an XSLT preprocess file to create a grouping in the data that will enable the splitting of the data across multiple Excel sheets based on the grouping.

This example groups the sample data by the Products.Brand field.

1. Create an XSLT file to group the data.

The following sample XSLT file groups the data according to <Products.Brand> and creates a high level element <BrandGroup> for each of those groups.

```
<?xml version="1.0" encoding="utf-8" ?>
<xsl:stylesheet version="2.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:template match="/">
    <ROWSET>
      <xsl:for-each-group select="/ROWSET/ROW" group-by="./Products.Brand">
        <xsl:variable name="var_brand" select="current-grouping-key()" />
        <BrandGroup>
          <xsl:attribute name="name">
```

```

        <xsl:value-of select="$var_brand" />
      </xsl:attribute>
      <xsl:copy-of select="current-group()" />
    </BrandGroup>
  </xsl:for-each-group>
</ROWSET>
</xsl:template></xsl:stylesheet>

```

When applied to the data sample, this XSLT file generates intermediate data as follows:

```

<ROWSET>
  <BrandGroup name="Enterprise">
    <ROW>
      <Products.Type>COATINGS</Products.Type>
      <Products.Brand>Enterprise</Products.Brand>
      <Markets.Region>CENTRAL REGION</Markets.Region>
      <Markets.District>CHICAGO DISTRICT</Markets.District>
      <Periods.Year>2000</Periods.Year>
      <Measures.Dollars>1555548.0</Measures.Dollars>
    </ROW>
    ...
  </BrandGroup>
  ... <ROWSET>

```

- Save the XSLT file as `splitByBrand.xml` and upload the file to the report definition in the catalog. Select "XSL Stylesheet (HTML/XML/Text)" as the template type.
- In the Excel template file, in the XDO\_METADATA sheet, enter the following:
  - For the **Preprocess XSLT File** parameter, enter "splitByBrand.xml"
  - In the Data Constraints region, make the entries to split the data into multiple sheets based on the `<BrandGroup>` element created by the results of the XSLT preprocessing.
    - Column A entry: XDO\_SHEET\_?, Column B entry: `<?//BrandGroup?>`
    - Column A entry: XDO\_SHEET\_NAME\_?, Column B entry: `<?./@name?>`

The sample entries in the XDO\_METADATA sheet are shown in this figure.

A6		Preprocess XSLT File
	A	B
1	Version	
2	ARU-dbdv	
3	Extractor Version	
4	Template Code	
5	Template Type	TYPE_EXCEL_TEMPLATE
6	Preprocess XSLT File	splitByBrand.xml
7	Last Modified Date	
8	Last Modified By	
9		
10	Data Constraints:	
11	XDO_SHEET_?	<?//BrandGroup?>
12	XDO_SHEET_NAME_?	<?./@name?>
13		

- Hide the XDO\_METADATA sheet if you do not want your users to see it. Upload the Excel template file to the report definition in the catalog.

## Split the Data by Count of Rows

This example demonstrates how to use an XSLT preprocess file to group the sample XML data.

Group the sample XML data by the count of occurrences of /ROWSET/ROW, and then configure the Excel template to create a new sheet for each occurrence of the newly created group.

1. Create an XSLT file to create groups in the data according to a size specified in a variable.

The following sample XSLT file groups the occurrences of /ROWSET/ROW according to the value of \$var\_size and creates a high level element <CountGroup> for each of those groups.

```
<?xml version="1.0" encoding="utf-8" ?> <xsl:stylesheet version="2.0"
xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
  <xsl:template match="/">
    <ROWSET>
      <xsl:variable name="var_size" select="3" />
      <xsl:for-each select="/ROWSET/ROW">
        <xsl:variable name="var_pos" select="position()" />
        <xsl:variable name="var_mod" select="$var_pos mod($var_size)" />
        <xsl:if test="$var_mod = 1">
          <xsl:variable name="var_groupNum" select="($var_pos - $var_mod) div number($var_size) + 1" />
          <xsl:element name="CountGroup">
            <xsl:attribute name="name">
              <xsl:value-of select="concat('Group', $var_groupNum)" />
            </xsl:attribute>
            <xsl:for-each select="/ROWSET/ROW[position() > ($var_pos - 1) and position() <= ($var_pos
+ $var_size)]">
              <xsl:copy-of select="." />
            </xsl:for-each>
          </xsl:element>
        </xsl:if>
      </xsl:for-each>
    </ROWSET>
  </xsl:template>
</xsl:stylesheet>
```

When applied to the data sample, this XSLT file generates intermediate data as follows:

```
<ROWSET>
  <CountGroup name="Group1">
    <ROW>
      <Products.Type>COATINGS</Products.Type>
      <Products.Brand>Enterprise</Products.Brand>
      <Markets.Region>CENTRAL REGION</Markets.Region>
      <Markets.District>CHICAGO DISTRICT</Markets.District>
      <Periods.Year>2000</Periods.Year>
      <Measures.Dollars>1555548.0</Measures.Dollars>
    </ROW>
    ...
  </CountGroup>
```

...  
<ROWSET>

2. Save the XSLT file as `splitByCount.xsl` and upload the file to the report definition in the catalog. Select "XSL Stylesheet (HTML/XML/Text)" as the template type.
3. In the Excel template file, in the XDO\_METADATA sheet, enter the following:
  - For the **Preprocess XSLT File** parameter, enter "splitByCount.xsl".
  - In the **Data Constraints** region, make these entries.
    - Column A entry: `XDO_SHEET_?`, Column B entry: `<?//CountGroup?>`
    - Column A entry: `XDO_SHEET_NAME_?`, Column B entry: `<?./@name?>`
4. Hide the XDO\_METADATA sheet so that it doesn't display to report consumers.
5. Upload the Excel template file to the report definition in the catalog.

# 16

## Create PDF Templates

This topic describes creating PDF templates for reports.

### Topics:

- [Overview of PDF Templates](#)
- [Requirements](#)
- [Design the Template](#)
- [Add Markup to the Template](#)
- [Create a Placeholder](#)
- [Define Groups of Repeating Fields](#)
- [Repeat a PDF Template by Using the document-repeat-elementname Form Field](#)
- [Add Page Numbers and Breaks](#)
- [Perform Calculations](#)
- [Completed PDF Layout Example](#)
- [Runtime Behavior](#)
- [Create a Layout from a Predefined PDF Form](#)
- [Add or Designate a Field for a Digital Signature](#)
- [PDF Template Limitations](#)

## Overview of PDF Templates

To create a PDF template, take an existing PDF document and apply the Publisher markup.

Because you can use a PDF from any source, you have multiple design options. For example:

- Design the template using any application that generates documents that can be converted to PDF, such as Microsoft Word
- Scan a paper document to use as a template
- Download a PDF document from a third-party website

The steps required to create a template from a third-party PDF depend on whether form fields have been added to the document. For more information, see [Create a Layout from a Predefined PDF Form](#).

If you are designing the template, then when you've converted to PDF, the template is treated like a set background. When you mark up the template, you draw fields on top of this background. To edit the template, you must edit the original document and then convert back to PDF.

For this reason, the PDF template isn't recommended for documents that require frequent updates. However, it's appropriate for forms that have a fixed template, such as invoices or purchase orders.

## Requirements

To apply or edit form fields in a PDF document, you must have Adobe Acrobat Professional.

Publisher supports Adobe Acrobat 5.0 and later as a tool for updating the template.


Publisher generates the output PDF version based on the input PDF version as follows:

- PDF version 1.4 and earlier generates PDF 1.4
- PDF version 1.5 and later generates the same output version as the input version

## Design the Template

To design the template you can use any desktop application that generates documents that can be converted to PDF. Or, scan in an original paper document to use as the background for the template.

The following figure shows a template for a sample purchase order. It was designed using Microsoft Word and converted to PDF using Adobe Acrobat Distiller.

		<b>Purchase Order</b>					
		PURCHASE ORDER NO.	REVISION				
VENDOR:		SHIP TO:					
		BILL TO:					
CUSTOMER ACCOUNT NO.	VENDOR NO.	DATE OF ORDER/BUYER	REVISED DATE/BUYER				
PAYMENT TERMS		SHIP VIA	FOB				
FREIGHT TERMS		REQUESTOR/DELIVER TO	CONFIRM TO/TELEPHONE				
ITEM	PART NUMBER/DESCRIPTION	DELIVERY	QUANTITY	UNIT	UNIT PRICE	EXTENSION	TAX
Total							
Oracle E-Business Suite							
AUTHORIZED SIGNATURE							

The following is the XML data that is used as input to this template:

```

<?xml version="1.0"?>
<POXPRPOP2>
  <G_HEADERS>
    <POH_PO_NUM>1190-1</POH_PO_NUM>
    <POH_REVISION_NUM>0</POH_REVISION_NUM>
    <POH_SHIP_ADDRESS_LINE1>3455 108th Avenue</POH_SHIP_ADDRESS_LINE1>
    <POH_SHIP_ADDRESS_LINE2></POH_SHIP_ADDRESS_LINE2>
    <POH_SHIP_ADDRESS_LINE3></POH_SHIP_ADDRESS_LINE3>
    <POH_SHIP_ADR_INFO>Seattle, WA 98101</POH_SHIP_ADR_INFO>
    <POH_SHIP_COUNTRY>United States</POH_SHIP_COUNTRY>
    <POH_VENDOR_NAME>Allied Manufacturing</POH_VENDOR_NAME>
    <POH_VENDOR_ADDRESS_LINE1>1145 Brokaw Road</POH_VENDOR_ADDRESS_LINE1>
    <POH_VENDOR_ADR_INFO>San Jose, CA 95034</POH_VENDOR_ADR_INFO>
    <POH_VENDOR_COUNTRY>United States</POH_VENDOR_COUNTRY>
  
```

```

<POH_BILL_ADDRESS_LINE1>90 Fifth Avenue</POH_BILL_ADDRESS_LINE1>
<POH_BILL_ADR_INFO>New York, NY 10022-3422</POH_BILL_ADR_INFO>
<POH_BILL_COUNTRY>United States</POH_BILL_COUNTRY>
<POH_BUYER>Smith, J</POH_BUYER>
<POH_PAYMENT_TERMS>45 Net (terms date + 45)</POH_PAYMENT_TERMS>
<POH_SHIP_VIA>UPS</POH_SHIP_VIA>
<POH_FREIGHT_TERMS>Due</POH_FREIGHT_TERMS>
<POH_CURRENCY_CODE>USD</POH_CURRENCY_CODE>
<POH_CURRENCY_CONVERSION_RATE></POH_CURRENCY_CONVERSION_RATE>
<LIST_G_LINES>
<G_LINES>
<POL_LINE_NUM>1</POL_LINE_NUM>
<POL_VENDOR_PRODUCT_NUM></POL_VENDOR_PRODUCT_NUM>
<POL_ITEM_DESCRIPTION>PCMCIA II Card Holder</POL_ITEM_DESCRIPTION>
<POL_QUANTITY_TO_PRINT></POL_QUANTITY_TO_PRINT>
<POL_UNIT_OF_MEASURE>Each</POL_UNIT_OF_MEASURE>
<POL_PRICE_TO_PRINT>15</POL_PRICE_TO_PRINT>
<C_FLEX_ITEM>CM16374</C_FLEX_ITEM>
<C_FLEX_ITEM_DISP>CM16374</C_FLEX_ITEM_DISP>
<PLL_QUANTITY_ORDERED>7500</PLL_QUANTITY_ORDERED>
<C_AMOUNT_PLL>112500</C_AMOUNT_PLL>
<C_AMOUNT_PLL_DISP> 112,500.00 </C_AMOUNT_PLL_DISP>
</G_LINES>
</LIST_G_LINES>
<C_AMT_POL_RELEASE_TOTAL_ROUND>312420</C_AMT_POL_RELEASE_TOTAL_ROUND>
</G_HEADERS>
</POXPRPOP2>

```

## Add Markup to the Template

After you've converted a document to PDF, you define form fields that display the data from the XML input file. These form fields are placeholders for the data. The process of associating the XML data to the PDF template is the same as the process for the RTF template.

See [Associate the XML Data to the Template Layout](#).

When you draw the form fields in Adobe Acrobat, you're drawing them *on top* of the template that you designed. There isn't a relationship between the design elements on the template and the form fields. You therefore must place the fields exactly where you want the data to display on the template.

## Create a Placeholder

You can define a placeholder as text, a check box, or a radio button, depending on how you want the data presented.

The steps for adding a form field depend on the version of Adobe Acrobat Professional that you are using. See the Adobe documentation for the version. If you are using Adobe Acrobat 9 Pro, then from the **Forms** menu, select **Add or Edit Fields**.

## Name the Placeholder

The name of the placeholder must match the XML source field name.



## Create a Text Placeholder

Follow these steps to create a text Form Field placeholder using Adobe Acrobat 9 Pro. If you are using a different version of Adobe Acrobat Professional, then refer to the documentation for details.

**To create a text placeholder:**

1. From the **Forms** menu, select **Add or Edit Fields**.
2. From the **Add New Field** list, choose **Text Field**. The cursor becomes a crosshair.
3. Place the crosshair in the form where you want the field to reside and click. The Field Name dialog pops up.
4. Enter the name. The name of the text field must match the name of the XML element from the data that is to populate this field at runtime.
5. To set more properties, click **Show All Properties**.

Use the Properties dialog box to set other attributes for the placeholder. For example, enforce maximum character size, set field data type, data type validation, visibility, and formatting.

6. If required, drag the field for exact placement and resize the field using the handles.

## Supported Field Properties Options

Publisher supports the following options available from the Field Properties dialog box.

Note that these options are not available when you use repeating fields. For more information about these options, see the Adobe Acrobat documentation.

- **General**
  - Read Only  
The setting of this check box in combination with a set of configuration properties controls the read-only/updatable state of the field in the output PDF. See [Set Fields as Updatable or Read Only](#).
  - Required
  - Visible/Hidden
  - Orientation (in degrees)
- **Appearance**
  - Border Settings: color, background, width, and style
  - Text Settings: color, font, size
  - Border Style
- **Options** tab
  - Multi-line
  - Scrolling Text
- **Format** tab - Number category options only
- **Calculate** tab - all calculation functions

## Create a Check Box

A check box is used to present options from which more than one can be selected. Each check box represents a different data element. You define the value that causes the check box to display as *checked*.

For example, a form contains a check box listing of automobile options such as Power Steering, Power Windows, and Sunroof. Each of these represents a different element from the XML file (for example <POWER\_STEERING>). If the XML file contains a value of Y for any of these fields, you want the check box to display as checked. All or none of these options may be selected.

The following describes how to create a check box field using Adobe Acrobat 9 Pro. If you are using a different version of Adobe Acrobat Professional, refer to the documentation for details.

**To create a check box:**

1. From the **Forms** menu, select **Add or Edit Fields**.
2. From the **Add New Field** list, choose **Check Box**. The cursor becomes a crosshair.
3. Place the crosshair in the form where you want the field to reside and click. The Field Name dialog pops up.
4. Enter the name. The name of the check box field must match the name of the XML element from the data that is to determine its state (checked or unchecked).
5. Click **Show All Properties**
6. Click the **Options** tab.
7. Select the **Check Box Style** type from the list.
8. In the **Export Value** field enter the value that the XML data field should match to enable the "checked" state.

For example, enter "Y" for each check box field.

9. Set other **Properties** as desired.

## Create a Radio Button Group

A radio button group is used to display options from which only one can be selected.

For example, the XML data file contains a field called <SHIPMENT\_METHOD>. The possible values for this field are "Standard" or "Overnight". You represent this field in the form with two radio buttons, one labeled "Standard" and one labeled "Overnight". Define both radio button fields as placeholders for the <SHIPMENT\_METHOD> data field. For one field, define the *on* state when the value is Standard. For the other, define the *on* state when the value is Overnight.

The following describes how to create a radio button group using Adobe Acrobat 9 Pro. If you are using a different version of Adobe Acrobat Professional, then refer to the documentation for details.

**To create a radio button group:**

1. From the **Forms** menu, select **Add or Edit Fields**.
2. From the **Add New Field** list, choose **Radio Button**. The cursor becomes a crosshair.
3. Place the crosshair in the form where you want the radio button group to reside and click. The Radio Group Name dialog pops up.

4. Enter the name. The name of the radio group must match the name of the XML element from the data that is to determine its state (selected or unselected).
5. In the **Button Value** field enter the value that the XML data field should match to enable the *on* state.  
For the example, enter Standard for the field labeled Standard.
6. To enter another radio button to the group, click **Add another button to group**. The name of the radio group defaults into the name field.
7. In the **Button Value** field enter the value that the XML data field should match to enable the *on* state for this button.  
For example, enter Overnight for the field labeled Overnight.
8. If you want to change any of the properties, then click **Show All Properties**. To change the radio button style, click the **Options** tab.
9. Select **Radio Button** from the **Type** drop down list.
10. Set other **Properties** as desired.

## Define Groups of Repeating Fields

In the PDF layout, you explicitly define the area on the page that contains the repeating fields. For example, on the purchase order layout, the repeating fields should display in the block of space between the Item header row and the Total field.

To define the area to contain the group of repeating fields:

1. Insert a Text Field at the beginning of the area that is to contain the group.
2. In the Field Name dialog, enter any unique name you choose. This field isn't mapped.
3. In the **Tooltip** field of the Text Field Properties dialog, enter the following syntax:  
`<?rep_field="BODY_START"?>`
4. Define the end of the group area by inserting a Text Field at the end of the area the that is to contain the group.
5. In the Field Name dialog, enter any unique name you choose. This field isn't mapped. Note that the name you assign to this field must be different from the name you assigned to the **body start** field.
6. In the **Tooltip** field of the Text Field Properties dialog, enter the following syntax:

`<?rep_field="BODY_END"?>`

To define a group of repeating fields:

1. Insert a placeholder for the first element of the group. The placement of this field in relationship to the BODY\_START tag defines the distance between the repeating rows for each occurrence.
2. For each element in the group, enter the following syntax in the **Tooltip** field:

`<?rep_field="T1_Gn"?>`

where n is the number of the element in the group.

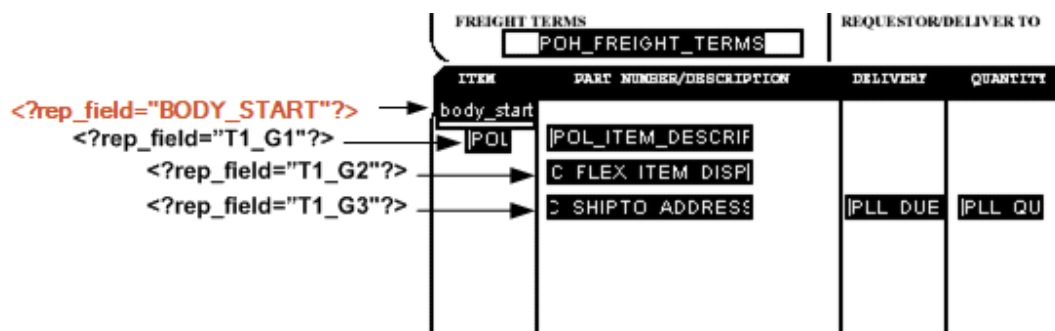
For example, the group in the sample report is laid out in three rows.

- For the fields belonging to the row that begins with PO\_LINE\_NUM enter

`<?rep_field="T1_G1"?>`

- For the fields belonging to the row that begins with C\_FLEX\_ITEM\_DISP enter  
`<?rep_field="T1_G2"?>`
- For the fields belonging to the row that begins with C\_SHIP\_TO\_ADDRESS enter  
`<?rep_field="T1_G3"?>`

The following figure shows the entries for the **Short Description/Tooltip** field:



## Repeat a PDF Template by Using the document-repeat-elementname Form Field

The document-repeat-elementname form field in a PDF template enables repeating the entire template for a specified group of data elements.

When you want to use the same PDF template for a group of data elements, set the document-repeat-elementname PDF form field to the group name of the data elements to be used in the report.

### Repeat a PDF Template in a Report

If the document-repeat-elementname PDF form field is set, when you run the report, the FormProcessor utility sends the PDF template and the associated XML data to the document repeat engine. The document repeat engine repeats the PDF template for each element of the group specified by document-repeat-elementname, and generates the report.

#### Example 16-1 Generate Monthly Payslips

To generate the monthly payslips for each employee in a department, set the document-repeat-elementname form field as shown below to the name of the group element associated with the data of employees in the department, and provide the XML data that contains the `employee_Data` element to the template. The report will iterate the same template for each employee payslip.

```
<?set-property: document-repeat-elementname; employee_Data?>
```

The following figure shows the documents-repeat-elementname field entry in the PDF template.

&lt;?document-repeat-elementname;employee\_Data?&gt;



DOCUMENT-REPEAT-ELEMENTNAME

Payslip for the month of

Employee No		Name	
Bank		Bank A/C No.	
DOI		LOP Days	
Department		Designation	

Earnings	Amount	Deductions	Amount
Basic		Professional Tax	
House Rent		Income Tax	
FBP – Taxable portion		Monthly Food Coupon Cost	
Child Education Allowance		Club Deduction	
Gross Earnings		Gross Deduction	
	Net Pay		

The following figure shows the report containing the payslips of the employees.

## Payslip for the month of June 2015

<b>Employee No</b>	101	<b>Name</b>	John Stuart
<b>Bank</b>	Deutsche Bank	<b>Bank A/C No.</b>	10822334
<b>DOJ</b>	Jan 23, 2010	<b>LOP Days</b>	0
<b>Department</b>	Production	<b>Designation</b>	Supervisor

<b>Earnings</b>	<b>Amount</b>	<b>Deductions</b>	<b>Amount</b>
Basic	30000	Professional Tax	200
House Rent	12000	Income Tax	17400
FBP – Taxable portion	6000	Monthly Food Coupon Cost	1650
Education Allowance	10000	Club Deduction	500
<b>Gross Earnings</b>	<b>58000</b>	<b>Gross Deduction</b>	<b>19750</b>
	<b>Net Pay</b>		<b>38250</b>

## Payslip for the month of June 2015

<b>Employee No</b>	102	<b>Name</b>	Peter Pan
<b>Bank</b>	Deutsche Bank	<b>Bank A/C No.</b>	145234
<b>DOJ</b>	May 26, 2009	<b>LOP Days</b>	0
<b>Department</b>	Production	<b>Designation</b>	Manager

<b>Earnings</b>	<b>Amount</b>	<b>Deductions</b>	<b>Amount</b>
Basic	45000	Professional Tax	200
House Rent	18000	Income Tax	24600
FBP – Taxable portion	9000	Monthly Food Coupon Cost	1650
Education Allowance	10000	Club Deduction	500
<b>Gross Earnings</b>	<b>82000</b>	<b>Gross Deduction</b>	<b>26950</b>
	<b>Net Pay</b>		<b>55050</b>

## Add Page Numbers and Breaks

This section describes how to add the following page features to the PDF layout.

- [Add Page Numbers](#)
- [Add Page Breaks](#)

### Add Page Numbers

To add page numbers, define a field in the layout where you want the page number to appear and enter an initial value in that field.

1. Decide the position on the layout where you want the page number to be displayed.
2. Create a placeholder field called @pagenum@.
3. Enter a starting value for the page number in the **Default** field (Text Field Properties > **Options** tab). If the XML data includes a value for this field, then the start value that is assigned in the layout is overridden. If no start value is assigned, then it defaults to 1.

## Add Page Breaks

You can define a page break in the layout to occur after a repeatable field.

To insert a page break after the occurrence of a specific field, add the following to the syntax in the **Tooltip** field of the Text Field Properties dialog:

```
page_break="yes"
```

For example:

```
<?rep_field="T1_G3", page_break="yes"?>
```

The following example demonstrates inserting a page break in a layout. The XML sample contains salaries of employees by department:

```
<?xml version="1.0"?>
<ROOT>
  <LIST_G_DEPTNO>
    <G_DEPTNO>
      <DEPTNO>10</DEPTNO>
      <LIST_G_EMPNO>
        <G_EMPNO>
          <EMPNO>7782</EMPNO>
          <ENAME>CLARK</ENAME>
          <JOB>MANAGER</JOB>
          <SAL>2450</SAL>
        </G_EMPNO>
        <G_EMPNO>
          <EMPNO>7839</EMPNO>
          <ENAME>KING</ENAME>
          <JOB>PRESIDENT</JOB>
          <SAL>5000</SAL>
        </G_EMPNO>
        <G_EMPNO>
          <EMPNO>125</EMPNO>
          <ENAME>KANG</ENAME>
          <JOB>CLERK</JOB>
          <SAL>2000</SAL>
        </G_EMPNO>
        <G_EMPNO>
          <EMPNO>7934</EMPNO>
          <ENAME>MILLER</ENAME>
          <JOB>CLERK</JOB>
          <SAL>1300</SAL>
        </G_EMPNO>
        <G_EMPNO>
          <EMPNO>123</EMPNO>
          <ENAME>MARY</ENAME>
          <JOB>CLERK</JOB>
          <SAL>400</SAL>
        </G_EMPNO>
        <G_EMPNO>
          <EMPNO>124</EMPNO>
          <ENAME>TOM</ENAME>
          <JOB>CLERK</JOB>
```

```

        <SAL>3000</SAL>
      </G_EMPNO>
    </LIST_G_EMPNO>
    <SUMSALPERDEPTNO>9150</SUMSALPERDEPTNO>
  </G_DEPTNO>

  <G_DEPTNO>
    <DEPTNO>30</DEPTNO>
    <LIST_G_EMPNO>
      .
      .
      .

    </LIST_G_EMPNO>
    <SUMSALPERDEPTNO>9400</SUMSALPERDEPTNO>
  </G_DEPTNO>
</LIST_G_DEPTNO>
<SUMSALPERREPORT>29425</SUMSALPERREPORT>
</ROOT>

```

Suppose the report requirement is to display the salary information for each employee by department as shown in the following figure:

## Department Salary Summary

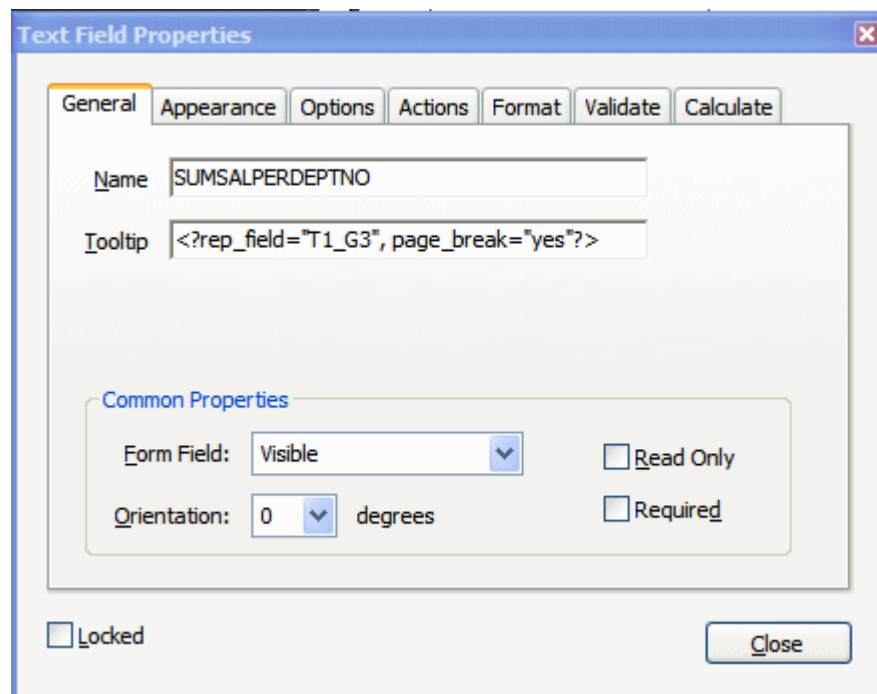
body_start	Dept No.	Emp No	Emp Name	Job	Salary
	DEPTNO	EMPNO	ENAME	JOB	SAL
					SUMSALPERDEP

To insert a page break after each department, insert the page break syntax in the **Tooltip** field for the **SUMSALPERDEPTNO** field as follows:

```
<?rep_field="T1_G3", page_break="yes"?>
```

The Text Field Properties dialog for the field is shown in the following figure.





For a break to occur, the field must be populated with data from the XML file.

The sample report with data is shown in the following figure:

## Department Salary Summary

Dept No.	Emp No	Emp Name	Job	Salary
10	7782	CLARK	MANAGER	2450
	7839	KING	PRESIDENT	5000
	125	KANG	CLERK	2000
	7934	MILLER	CLERK	1300
	123	MARY	CLERK	400
	124	TOM	CLERK	3000
				9150

## Department Salary Summary

Dept No.	Emp No	Emp Name	Job	Salary
20	7369	SMITH	CLERK	800
	7876	ADAMS	CLERK	1100
	7902	FORD	ANALYST	3000
	7788	SCOTT	ANALYST	3000
	7566	JONES	MANAGER	2975
				10875

The page breaks after each department.

## Perform Calculations

Adobe Acrobat provides a calculation function in the Field Properties dialog box.

To create a field to display a calculated total on a report:

1. Create a text field to display the calculated total. Give the field any **Name** you choose.
2. In the **Field Properties** dialog box, select the Format tab.
3. Select **Number** from the **Category** list.
4. Select the Calculate tab.
5. Select the radio button next to "Value is the <List of operations> of the following fields:"
6. Select **sum (+)** from the list.
7. Click the **Pick...** button and select the fields to be totaled.

## Completed PDF Layout Example

The figure gives an illustration of a completed PDF layout.

**ORACLE®**  
E-Business Suite

**Purchase Order**

PURCHASE ORDER NO.	REVISION	PAGE
IPOH PO 41	IPOH	

**SHIP TO:**

IPOH SHIP ADDRESS
POH SHIP ADR INFO
IPOH SHIP COUNTRY

**BILL TO:**

IPOH BILL ADDRESS
IPOH BILL ADR INFO
IPOH BILL COUNTRY

**VENDOR:**

POH VENDOR NAME
IPOH VENDOR ADDRESS 11
POH VENDOR ADR INFO
POH VENDOR COUNTRY

CUSTOMER ACCOUNT NO.	VENDOR NO.	DATE OF ORDER/BUYER	REVISED DATE/BUYER
IPOH CUST	IPOH VE	IPOH CR IPOH AR	
PAYMENT TERMS	SHIP VIA	FOB	
POH PAYMENT TERMS	IPOH SHIP V	POH FOB	
FREIGHT TERMS	REQUESTOR/DELIVER TO	CONTACT TELEPHONE	
POH FREIGHT TERMS			

ITEM	PART NUMBER/DESCRIPTION	DELIVERY	QUANTITY	UNIT	UNIT PRICE	EXTENSION	TAX
Ibody_1 IPO	IPOH ITEM DES IC FLEX ITEM IC SHIPTO ADD	IPII DI	IPII T	POL	IPOH	IC AMT	IPII
Ibody_2							

**Total** IC AMOUNT P

Oracle E-Business Suite

AUTHORIZED SIGNATURE

## Runtime Behavior

The following sections describe runtime behavior of PDF templates:

- [Placement of Repeating Fields](#)
- [Set Fields as Updatable or Read Only](#)
- [Overflow Data](#)

### Placement of Repeating Fields

The placement, spacing, and alignment of fields that you create on the layout are independent of the underlying form layout.

At runtime, according to calculations performed on the placement of the rows of fields that you created, Publisher places each repeating row of data as follows:

**First occurrence:**

The first row of repeating fields displays exactly where you placed them on the layout.

**Second occurrence, single row:**

To place the second occurrence of the group, Publisher calculates the distance between the BODY\_START tag and the first field of the first occurrence. The first field of the second occurrence of the group is placed this calculated distance below the first occurrence.

**Second occurrence, multiple rows:**

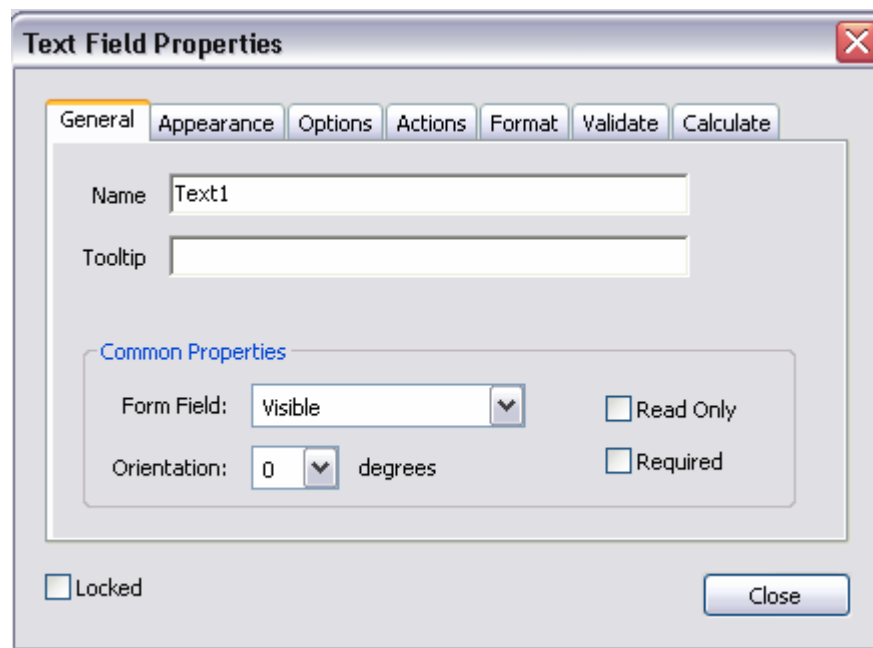
If the first group contains multiple rows, then the second occurrence of the group is placed the calculated distance below the last row of the first occurrence.

The distance between the rows within the group is maintained as defined in the first occurrence.

### Set Fields as Updatable or Read Only

You can make fields either read only or updatable.

When you define a field in the layout, you can set it to "Read Only", as shown in the following illustration:



Regardless of what you choose at design time for the Read-Only check box, the default behavior of the PDF processing engine is to set all fields to read-only for the output PDF. You can change this behavior using the following report properties:

- all-field-readonly
- all-fields-readonly-axis
- remove-pdf-fields

Note that in the first two options, you're setting a state for the field in the PDF output. The setting of individual fields can still be changed in the output using Adobe Acrobat Professional. Also note that because the fields are maintained, the data is still separate and can be extracted. In the third option, "remove-pdf-fields" the structure is flattened and no field/data separation is maintained.

**To make all fields updatable:**

Set the "all-field-readonly" property to "false". This sets the Read-Only state to false for all fields regardless of the individual field settings at design time.

**To make all fields read only:**

This is the default behavior. No settings are required.

**To maintain the Read-Only check box selection for each field:**

To maintain the setting of the Read Only check box on a field-by-field basis in the output PDF, set the property, all-fields-readonly-axis, to true. This property overrides the settings of all-field-readonly.

**To remove all fields from the output PDF:**

Set the property "remove-pdf-fields" to "true".

## Overflow Data

When multiple pages are required to accommodate the occurrences of repeating rows of data, each page displays identically except for the defined repeating area, which displays the continuation of the repeating data.

For example, if the item rows of the purchase order extend past the area defined on the layout, succeeding pages displays all data from the purchase order form with the continuation of the item rows.

## Create a Layout from a Predefined PDF Form

There're many PDF forms available online that you may want to use as layouts for the report data. For example, government forms that your company is required to submit. You can use these downloaded PDF files as the report layouts, supplying the XML data at runtime to fill in the report fields.

Some of these forms already have form fields defined, some don't. If the PDF form already has fields defined, then you can use one of the following methods to match the form field names to the data field names:

- Use Adobe Acrobat Professional to rename the fields in the document to match the names of the elements in the XML data file.
- Use BI Publisher's Data Model Editor to rename the XML element names in the data file to match the field names in the PDF form.

If the form fields are not already defined in the downloaded PDF, then you must create them.

## Determine If a PDF Has Form Fields Defined

Follow these steps to determine if a PDF has form fields defined and to get a list of the field names.

1. Open the document in Adobe Acrobat Professional.
2. Click **Highlight Fields**. Form fields that exist in the document are highlighted.
3. From the **Form** menu, select **Add or Edit Fields**. The field names display in the document as well as in the **Fields** pane.

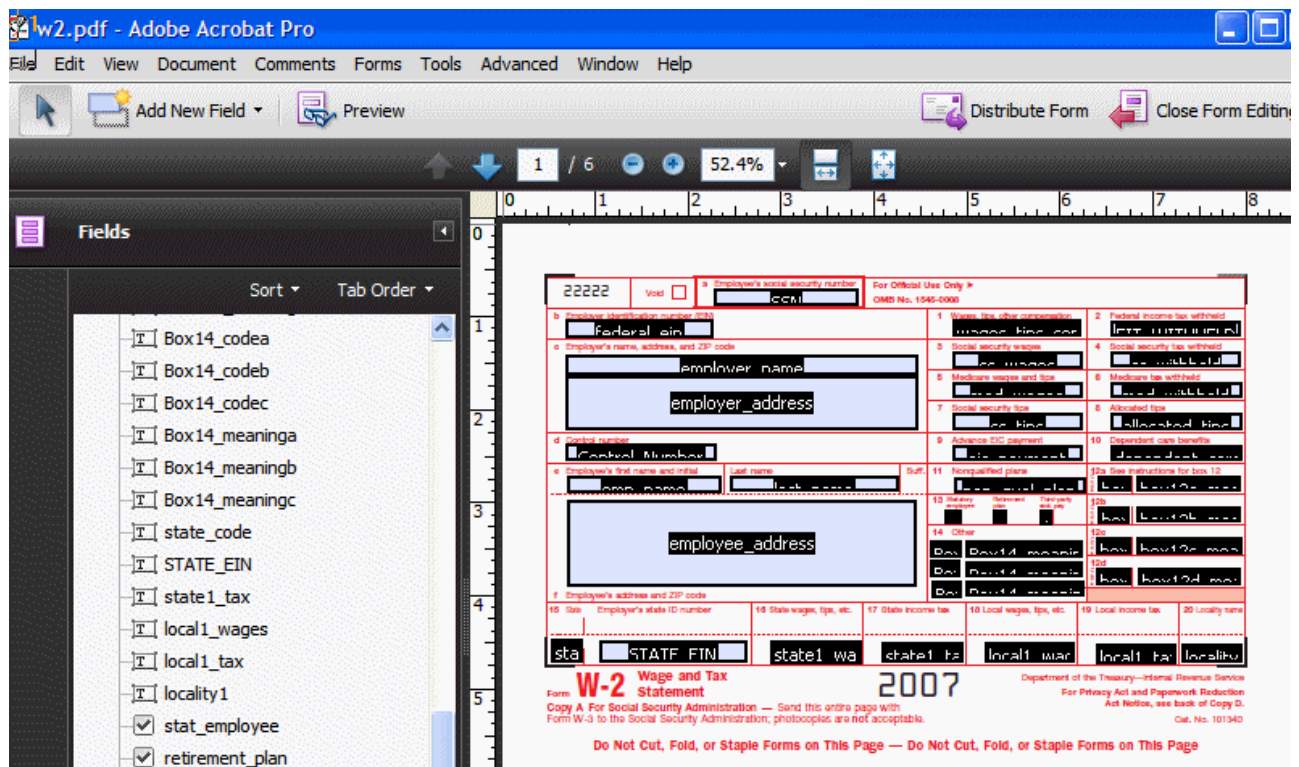
## Use a Predefined PDF Form as a Layout by Renaming the Form Fields

You can use a PDF form as a template for another form.

To use a predefined PDF form as a layout:

1. Download or import the PDF file to the local system.
2. Open the file in Adobe Acrobat Professional.
3. From the **Form** menu, select **Add or Edit Fields**. This highlights text fields that have already been defined.

The following illustration shows a sample W-2 PDF form after selecting **Add or Edit Fields** to highlight the text fields.



To map the existing form fields to the data from the incoming XML file, rename the fields to match the element names in the XML file.

4. Open the form field **Text Field Properties** dialog by either double-clicking the field, or by selecting the field then selecting **Properties** from the right-mouse menu.
5. In the **Name** field, enter the element name from the input XML file.
6. Repeat for all fields that you want populated by the data file.
7. When all fields have been updated, click **Close Form Editing**.
8. Save the layout.

## Use the Comb of Characters Option

The comb of characters option for a PDF form field in Adobe Acrobat spreads the text evenly across the width of the text field.

Use this option when the form field requires the characters to be entered in specific positions, as the Routing number field shown in the following figure:

11a If line 9 is larger than line 10, subtract line 10 from line 9. This is your refund.  
If Form 8888 is attached, check here ☒

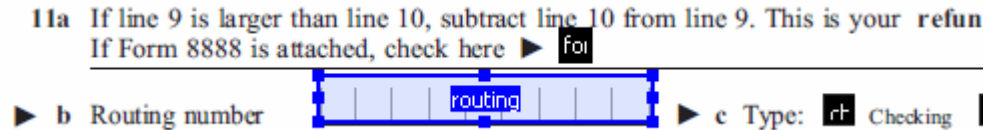
b Routing number 

1	2	3	4	5	6	7	8	9
---	---	---	---	---	---	---	---	---

 c Type: ☒ Checking ☐ Savings

To use this feature, perform the following:

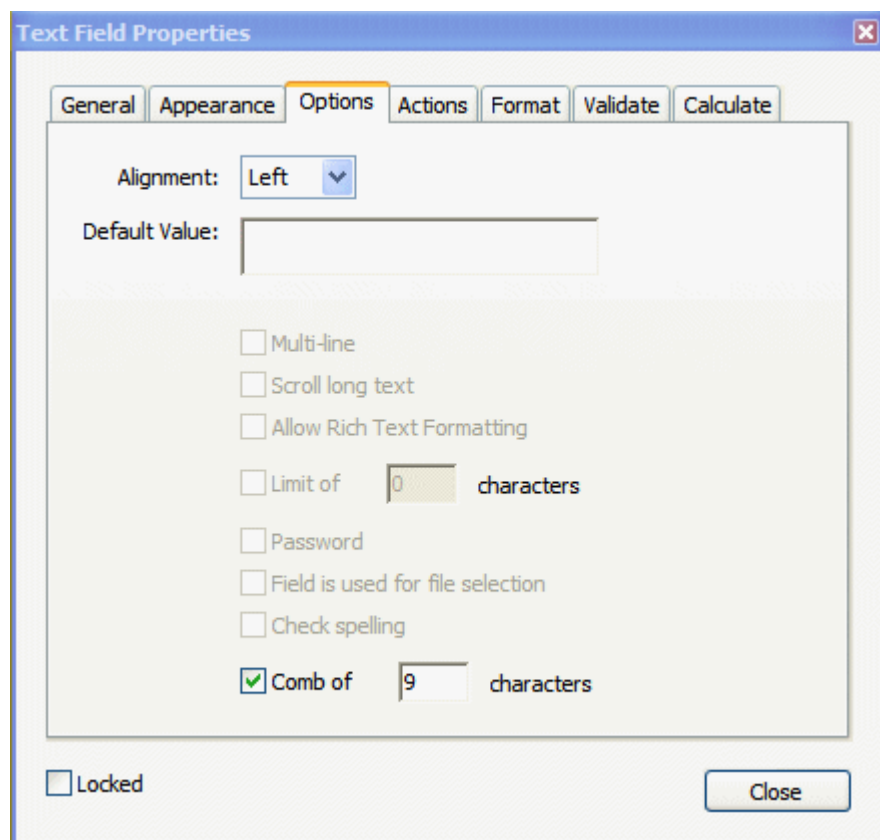
1. In Adobe Acrobat Professional, add the form field as a text field. An example is shown in the following figure:



2. Open the Text Field Properties dialog and click the **Options** tab. Clear all check boxes and select the **Comb of characters** check box.

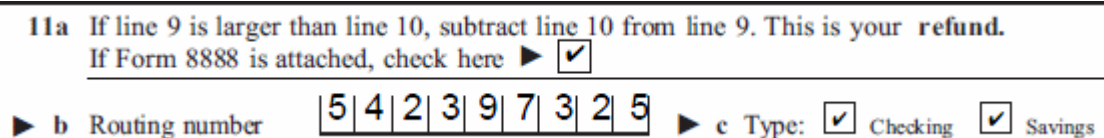
The **Comb of characters** option is only enabled when all other options are cleared.

Enter the number of characters in the text field. For the routing number example, a value of 9 is entered in the **Comb of** field as shown in the following figure:



If your data may not contain the number of characters specified each time, you can set the **Alignment** option to specify whether the value will be aligned to the right, left, or center within the field.

When you run the report, the characters comprising the value for the routing field will be spread across the text field as shown in the following figure:





The following figure shows how the data will display in the field when the data for the routing field doesn't contain the full nine characters and the **Alignment** option is set to left:

11a If line 9 is larger than line 10, subtract line 10 from line 9. This is your refund.  
If Form 8888 is attached, check here ☒

---

► b Routing number 

5	4	2	3	9	7	3		
---	---	---	---	---	---	---	--	--

 ► c Type: ☒ Checking ☒ Savings

## Add or Designate a Field for a Digital Signature

Publisher supports digital signatures on PDF output documents. Digital signatures enable you to verify the authenticity of the documents you send and receive. Publisher can access the digital ID file from a central, secure location and at runtime sign the PDF output with the digital ID. The digital signature verifies the signer's identity and ensures that the document hasn't been altered after it was signed.

Implementing digital signature requires several tasks across the Publisher product. This topic describes how to add a new field or configure an existing field in the PDF template for the digital signature.

### About Signature Field Options

For PDF templates you've these options for designating a digital signature field for the output report.

- Add a signature field to the PDF layout.  
Use this option if you want the digital signature to appear in a specific field and the PDF template doesn't include a signature field.
- Use an existing signature field in the PDF template.  
Use this option if the PDF template already includes a signature field that you want to use. To designate an existing field for the digital signature, define the field in the Runtime Configuration page.
- Designate the position of the digital signature on the output report by setting x and y coordinates.  
Use this option if you prefer to designate the x and y coordinates for the placement of the digital signature, rather than use a signature field. You set the position using the runtime digital signature properties.

All three options require setting configuration properties for the report in the Report Properties page after you've uploaded the template.

### Add a Signature Field

Follow these steps to add a signature field.

1. Open the template in Adobe Acrobat Professional.
2. From the **Form** menu, select **Add or Edit Fields**. Then click **Add New Field**. Choose **Digital Signature** from the list of fields.
3. Draw the signature field in the desired location on the layout. When you release the mouse button, a dialog prompts you to enter a name for the field.

4. Enter a name for the signature field. The following figure shows an inserted digital signature field called "My\_Signature."

The image shows a W-4 form with a 'Digital Signature Properties' dialog box open. The dialog has tabs for 'General', 'Appearance', 'Actions', and 'Signed'. The 'General' tab is active, showing the 'Name' field set to 'My\_Signature' and the 'Form Field' set to 'Visible'. The 'Orientation' is set to '0 degrees'. There are checkboxes for 'Read Only', 'Required', and 'Locked'. The background shows the W-4 form with fields for employee information and allowances.

5. Save the template.
6. Configure the report to insert the digital signature at runtime.

## Configure the Report to Insert the Digital Signature at Runtime

After you've uploaded the PDF template to the report definition, you enable digital signature and specify the signature field in the Report Properties.

1. From the edit report page, click **Properties** and then click the **Formatting** tab.
2. Scroll to the **PDF Digital Signature** group of properties.
3. Set **Enable Digital Signature** to **True**.
4. For the property **Existing signature field name**, enter the field name from the PDF template.

No other properties are required for this method.

The following figure shows the **My\_Signature** field name entered into the properties field.

Properties	Report Value	Server Value
Use only one shared resources object for all pages	<input type="button" value="v"/>	true
<b>PDF Digital Signature</b>		
Enable Digital Signature	True <input type="button" value="v"/>	false
Existing signature field name	My_Signature	null
Signature field location	<input type="button" value="v"/>	null
Signature field X coordinate		0
Signature field Y coordinate		0
Signature field width		0
Signature field height		0
<b>RTF Output</b>		
Enable change tracking	<input type="button" value="v"/>	false
Protect document for tracked changes	<input type="button" value="v"/>	false
Default font		Arial: 12

5. Click **OK**.

The runtime properties that you set are at the report level and not the layout level. Therefore any layouts associated with the report now include the digital signature as specified in the Report Properties. When an **Existing signature field name** is specified, the template must contain the field for the signature to be applied.

## PDF Template Limitations

The PDF template has a few limitations.

The PDF template doesn't support:

- The field properties mentioned in [Supported Field Properties Options](#) for repeating fields.
- Nested repeating fields.
- Section-wise repeat. The document-repeat-elementname field is used for repeating the entire template.
- Pixel control.
- Data alignment in fields.
- Large documents. You might experience performance issues when a document is larger than 250 MB.

To avoid these limitations, use an RTF template instead of a PDF template.

# Create eText Templates

This topic describes creating the eText templates in Microsoft Word. Publisher uses eText templates to generate the flat files for EDI and EFT transactions.

## Topics:

- [Overview](#)
- [Structure of eText Templates](#)
- [Construct the Data Tables](#)
- [Command Rows](#)
- [Structure of the Data Rows](#)
- [Set Up Command Tables](#)
- [Create a Filler Block](#)
- [Expressions, Control Structures, and Functions](#)
- [Identifiers, Operators, and Literals](#)

## Overview

An eText template is an RTF-based template that is used to generate text output for Electronic Funds Transfer (EFT) and Electronic Data Interchange (EDI).

At runtime, Publisher applies this template to an input XML data file to create an output text file that can be transmitted to a bank or other customer. Because the output is intended for electronic communication, the eText templates must follow very specific format instructions for exact placement of data.

An EFT is an electronic transmission of financial data and payments to banks in a specific fixed-position format flat file (text).

EDI is similar to EFT except it's not limited to the transmission of payment information to banks. It's often used as a method of exchanging business documents, such as purchase orders and invoices, between companies. EDI data is delimiter-based, and also transmitted as a flat file (text).

Files in these formats are transmitted as flat files, rather than printed on paper. The length of a record is often several hundred characters and therefore difficult to layout on standard size paper.

To accommodate the record length, the EFT and EDI templates are designed using tables. Each record is represented by a table. Each row in a table corresponds to a field in a record. The columns of the table specify the position, length, and value of the field.

These formats can also require special handling of the data from the input XML file. This special handling can be on a global level (for example, character replacement and sequencing) or on a record level (for example, sorting). Commands to perform these functions are declared in command rows. Global level commands are declared in setup tables.

At runtime, Publisher constructs the output file according to the setup commands and layout specifications in the tables.

## Prerequisites

This section is intended for users who're familiar with EDI and EFT transactions.

Preparers of eText templates require both functional and technical knowledge; that is, functional expertise to understand bank and country specific payment format requirements and sufficient technical expertise to understand XML data structure and eText specific coding syntax commands, functions, and operations.

## Structure of eText Templates

There're two types of eText templates: fixed-position based (EFT templates) and delimiter-based (EDI templates).

The templates are composed of a series of tables. The tables define layout and setup commands and data field definitions. The required data description columns for the two types of templates vary, but the commands and functions available are the same. A table can contain just commands, or it can contain commands and data fields.

The following illustration shows a sample from an EFT template to display the general structure of command and data rows.

XDO file name:  
APXNACHA.rtf

Mapping of Payment Format:  
**US NACHA Payments EFT Format**

Date: 4/22/2004

### Format Setup:

Hint: Define formatting options...

<TEMPLATE TYPE>	FIXED POSITION BASED
<OUTPUT CHARACTER SET>	iso-8859-1
<NEW RECORD CHARACTER>	Carriage Return

### Sequences:

Hint: Define sequence generators...

<DEFINE SEQUENCE>	PaymentsSeq
<RESET AT LEVEL>	PayerInstrument
<INCREMENT BASIS>	LEVEL
<END DEFINE SEQUENCE >	PaymentsSeq

} Commands

### Format Data Records:

<LEVEL>	<POSITION>	<LENGTH>	<FORMAT>	<PAD>	<DATA>	<COMMENTS>
<NEW RECORD>						
1	1		Number		1	Record Type Code
2	2		Alpha	R, ' '	'01'	Priority Code
4	1		Alpha	R, ' '		Immediate Origin
5	9		Alpha	R, ' '	BankAccount/BankNumber	Immediate Origin
14	1		Alpha	R, ' '	'1'	Mutually Agreed
15	9		Alpha	R, ' '	Payer/TaxIdentifier	Immediate Origin
24	6		Date		SYSDATE	File Creation Date

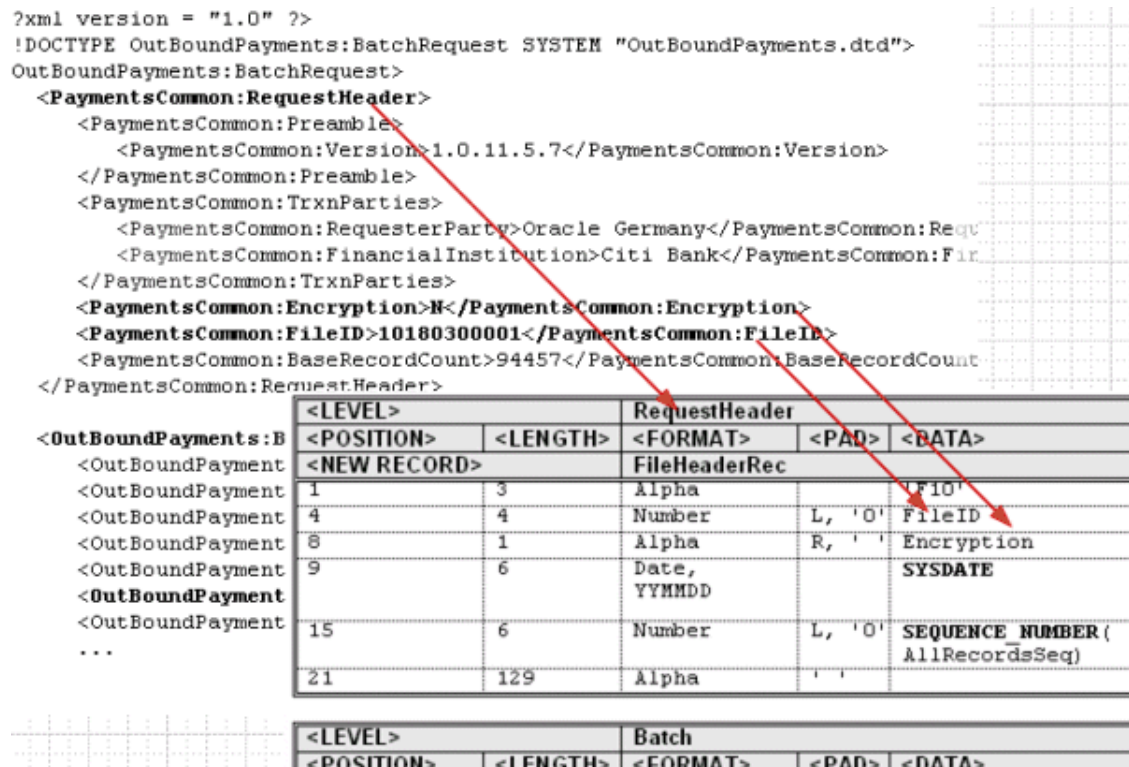
} Data Elements or Functions

Commands that apply globally, or commands that define program elements for the template, are "setup" commands. These must be specified in the initial tables of the template. Examples of setup commands are Template Type and Character Set.

In the data tables you provide the source XML data element name and the specific placement and formatting definitions required by the receiving bank or entity. You can also define functions to be performed on the data and conditional statements.

The data tables must always start with a command row that defines the "Level." The Level associates the table to an element from the XML data file, and establishes the hierarchy. The data fields that are then defined in the table for the Level correspond to the child elements of the XML element.

The following graphic illustrates the relationship between the XML data hierarchy and the template Level. The XML element "RequestHeader" is defined as the Level. The data elements defined in the table ("FileID" and "Encryption") are children of the RequestHeader element.



The order of the tables in the template determines the print order of the records. At runtime the system loops through all the instances of the XML element corresponding to a table (Level) and prints the records belonging to the table. The system then moves on to the next table in the template. If tables are nested, the system generates the nested records of the child tables before moving on to the next parent instance.

## Command Rows, Data Rows, and Data Column Header Rows

Command rows are used to specify commands in the template. Command rows always have two columns: command name and command parameter. Command rows don't have column headings. The commands control the overall setup and record structures of the template.

The following figure shows the placement of Command Rows, Data Rows, and Data Column Header Rows:

XDO file name:  
APXNACHA.rtf

*Mapping of Payment Format:*  
**US NACHA Payments EFT Format**

**Format Setup:**

*Hint: Define formatting options...*

<TEMPLATE TYPE>	FIXED_POSITION_BASED
<CHARACTER SET>	iso-8859-1
<NEW RECORD CHARACTER>	Carriage Return

Sequences :

Hint: Define sequence generators...

<DEFINE SEQUENCE>	PaymentsSeq
<RESET AT LEVEL>	PayerInstrument
<INCREMENT BASIS>	LEVEL
<END DEFINE SEQUENCE >	PaymentsSeq

**Format Data Records:**

<LEVEL>		Payer Instrument			
<POSITION>	<LENGTH>	<FORMAT>	<PAD>	<DATA>	<COMMENT>
<NEW RECORD>					
1	1	Number		1	Record Type
2	2	Alpha	R, ' '	'01'	Priority Code
4	1	Alpha	R, ' '		Immediate D blank
5	9	Alpha	R, ' '	BankAccount/BankNumber	Immediate D
14	1	Alpha	R, ' '	'1'	Mutually Ag
15	9	Alpha	R, ' '	Payer/TaxIdentifier	Immediate O
24	6	Date,		SYSDATE	File Creation

## Command Rows

Data Field  
Column  
Header

### Data Rows

Blank rows can be inserted anywhere in a table to improve readability. Most often they're used in the setup table, between commands. Blank rows are ignored by Publisher when the template is parsed.

## Data Column Header Rows

Data column headers specify the column headings for the data fields (such as Position, Length, Format, Padding, and Comments). A column header row usually follows the Level command in a table (or the sorting command, if one is used). The data column header row must come before any data rows in the table. Additional empty column header rows can be inserted at any position in a table to improve readability. The empty rows are ignored at runtime.

The required data column header rows vary depending on the template type. See [Structure of the Data Rows](#).

## Data Rows

Data rows provide the values for the data column header attributes for each data field.

The content of the data rows varies depending on the template type. See [Structure of the Data Rows](#).

## Construct the Data Tables

The data tables contain a combination of command rows and data field rows. Each data table must begin with a Level command row that specifies its XML element. Each record must begin



with a New Record command that specifies the start of a new record, and the end of a previous record (if any).

The required columns for the data fields vary depending on the Template Type.

## Command Rows

The command rows always have two columns: command name and command parameter.

The supported commands are:

- [Level Command](#)
- [New Record Command](#)
- [Sort Ascending and Sort Descending Commands](#)
- [Display Condition Command](#)

The usage for each of these commands is described in the following sections.

### Level Command

The level command associates a table with an XML element. The parameter for the level command is an XML element. The level is printed once for each instance the XML element appears in the data input file.

The level commands define the hierarchy of the template. For example, Payment XML data extracts are hierarchical. A batch can have multiple child payments, and a payment can have multiple child invoices. This hierarchy is represented in XML as nested child elements within a parent element. By associating the tables with XML elements through the level command, the tables also have the same hierarchical structure.

Similar to the closing tag of an XML element, the level command has a companion end-level command. The child tables must be defined between the level and end-level commands of the table defined for the parent element.

An XML element can be associated with only one level. All the records belonging to a level must reside in the table of that level or within a nested table belonging to that level. The end-level command is specified at the end of the final table.

Following is a sample structure of an EFT file record layout:

- FileHeaderRecordA
  - BatchHeaderRecordA
  - BatchHeaderRecordB
  - PaymentRecordA
  - PaymentRecordB
  - \* InvoiceRecordA
  - Batch FooterRecordC
  - BatchFooterRecordD
- FileFooterRecordB

Following would be its table layout:



The table layout displays the command and its value:

```
<LEVEL> : RequestHeader
<NEW RECORD> : FileHeaderRecordA
Data rows for the FileHeaderRecordA
```

```
<LEVEL> : Batch
<NEW RECORD> : BatchHeaderRecordA
Data rows for the BatchHeaderRecordA
<NEW RECORD> : BatchHeaderRecordB
Data rows for the BatchHeaderRecordB
```

```
<LEVEL> : Payment
<NEW RECORD> : PaymentRecordA
Data rows for the PaymentRecordA
<NEW RECORD> : PaymentRecordB
Data rows for the PaymentRecordB
```

```
<LEVEL> : Invoice
<NEW RECORD> : InvoiceRecordA
Data rows for the InvoiceRecordA
<END LEVEL> : Invoice
```

```
<END LEVEL>: Payment
```

```
<LEVEL> : Batch
<NEW RECORD> : BatchFooterRecordC
Data rows for the BatchFooterRecordC
<NEW RECORD> : BatchFooterRecordD
Data rows for the BatchFooterRecordD
<END LEVEL> : Batch
```

```
<LEVEL> : RequestHeader
<NEW RECORD> : FileFooterRecordB
Data rows for the FileFooterRecordB
<END LEVEL> : RequestHeader
```

Multiple records for the same level can exist in the same table. However, each table can only have one level defined. In the example above, the BatchHeaderRecordA and BatchHeaderRecordB are both defined in the same table. However, note that the END LEVEL for the Payment must be defined in its own separate table after the child element Invoice. The Payment END LEVEL cannot reside in the same table as the Invoice Level.

Note that you do not have to use all the levels from the data extract in the template. For example, if an extract contains the levels: RequestHeader > Batch > Payment > Invoice, you can use just the batch and invoice levels. However, the hierarchy of the levels must be maintained.

The table hierarchy determines the order that the records are printed. For each parent XML element, the records of the corresponding parent table are printed in the order they appear in

the table. The system loops through the instances of the child XML elements corresponding to the child tables and prints the child records according to their specified order. The system then prints the records of the enclosing (end-level) parent table, if any.

For example, given the EFT template structure above, assume the input data file contains the following:

- Batch1
  - Payment1
    - \* Invoice1
    - \* Invoice2
  - Payment2
    - \* Invoice1
- Batch2
  - Payment1
    - \* Invoice1
    - \* Invoice2
    - \* Invoice3

Record Order	Record Type	Description
1	FileHeaderRecordA	One header record for the EFT file
2	BatchHeaderRecordA	For Batch1
3	BatchHeaderRecordB	For Batch1
4	PaymentRecordA	For Batch1, Payment1
5	PaymentRecordB	For Batch1, Payment1
6	InvoiceRecordA	For Batch1, Payment1, Invoice1
7	InvoiceRecordA	For Batch1, Payment1, Invoice2
8	PaymentRecordA	For Batch1, Payment2
9	PaymentRecordB	For Batch1, Payment2
10	InvoiceRecordA	For Batch1, Payment2, Invoice1
11	BatchFooterRecordC	For Batch1
12	BatchFooterRecordD	For Batch1
13	BatchHeaderRecordA	For Batch2
14	BatchHeaderRecordB	For Batch2
15	PaymentRecordA	For Batch2, Payment1
16	PaymentRecordB	For Batch2, Payment1
17	InvoiceRecordA	For Batch2, Payment1, Invoice1
18	InvoiceRecordA	For Batch2, Payment1, Invoice2
19	InvoiceRecordA	For Batch2, Payment1, Invoice3
20	BatchFooterRecordC	For Batch2
21	BatchFooterRecordD	For Batch2
22	FileFooterRecordB	One footer record for the EFT file

## New Record Command

The new record command signifies the start of a record and the end of the previous one, if any.

Every record in a template must start with the new record command. The record continues until the next new record command, or until the end of the table or the end of the level command.

A record is a construct for the organization of the elements belonging to a level. The record name is not associated with the XML input file.

A table can contain multiple records, and therefore multiple new record commands. All the records in a table are at the same hierarchy level. They're printed in the order in which they're specified in the table.

The new record command can have a name as its parameter. This name becomes the name for the record. The record name is also referred to as the record type. The name can be used in the COUNT function for counting the generated instances of the record. See the COUNT function [Functions](#) for more information.

Consecutive new record commands (or empty records) aren't allowed.

## Sort Ascending and Sort Descending Commands

Use the sort ascending and sort descending commands to sort the instances of a level.

Enter the elements that you want to sort by in a comma-separated list. This is an optional command. When used, it must come right after the (first) level command and it applies to all records of the level, even if the records are specified in multiple tables.

## Display Condition Command

The display condition command specifies when the enclosed record or data field group should be displayed. The command parameter is a boolean expression. When it evaluates to true, the record or data field group is displayed. Otherwise the record or data field group is skipped.

The display condition command can be used with either a record or a group of data fields. When used with a record, the display condition command must follow the new record command. When used with a group of data fields, the display condition command must follow a data field row. In this case, the display condition applies to the rest of the fields through the end of the record.

Consecutive display condition commands are merged as AND conditions. The merged display conditions apply to the same enclosed record or data field group.

## Structure of the Data Rows

The output record data fields are represented in the template by table rows.

In FIXED\_POSITION\_BASED templates, each row has the following attributes (or columns):

- [Position](#)
- [Length/Maximum Length](#)
- [Format Column](#)
- [Pad](#)

- [Data](#)
- [Comments](#)

The first five columns are required and must appear in the order listed.

For DELIMITER\_BASED templates, each data row has the following attributes (columns):

- [Length/Maximum Length](#)
- [Format Column](#)
- [Data](#)
- [Tag](#)
- [Comments](#)

The first three columns are required and must be declared in the order stated.

In both template types, the Comments column is optional and ignored by the system. You can insert additional information columns, because all columns after the required ones are ignored.

The usage rules for these columns are as follows:

## Position

Specifies the starting position of the field in the record. The unit is in number of characters.

This column is only used with FIXED\_POSITION\_BASED templates.

## Length/Maximum Length

Specifies the length of the field.

The unit is in number of characters. For FIXED\_POSITION\_BASED templates, all the fields are fixed length. If the data is less than the specified length, it's padded. If the data is longer, it's truncated. The truncation always occurs on the right.

For DELIMITER\_BASED templates, this value specifies the maximum length of the field. If the data exceeds the maximum length, it's truncated. Data less than the maximum length isn't padded.

## Format Column

Format Column specifies the data type and format setting.

There're three accepted data types:

- Alpha
- Number
- Date

Refer to [Field-Level Key Words](#) for their usage.

## Number Data Type

Numeric data has three optional format settings: Integer, Decimal, or you can define a format mask.

Specify the optional settings with the Number data type as follows:

- Number, Integer
- Number, Decimal
- Number, <format mask>

For example:

Number, ###,###.00

The Integer format uses only the whole number portion of a numeric value and discards the decimal. The Decimal format uses only the decimal portion of the numeric value and discards the integer portion.

The following table shows examples of how to set a format mask. When specifying the mask, # represents that a digit is to be displayed when present in the data; 0 represents that the digit placeholder is to be displayed whether data is present or not.

When specifying the format mask, the group separator must always be "," and the decimal separator must always be "." To alter these in the actual output, you must use the Setup Commands NUMBER THOUSANDS SEPARATOR and NUMBER DECIMAL SEPARATOR. See [Set Up Command Tables](#) for details on these commands.

The following table shows sample Data, Format Specifier, and Output. The Output assumes the default group and decimal separators.

Data	Format Specifier	Output
123456789	###,###.00	123,456,789.00
123456789.2	###.00	123456789.20
1234.56789	###.000	1234.568
123456789.2	#	123456789
123456789.2	#.##	123456789.2
123456789	#.##	123456789

## Date Data Type

The Date data type format setting must always be explicitly stated. The format setting follows the SQL date styles, such as MMDDYY.

## Map EDI Delimiter-Based Data Types to eText Data Types

Some EDI (DELIMITER\_BASED) formats use more descriptive data types.

These are mapped to the three template data types as shown in the following table.

ASC X12 Data Type	Format Template Data Type
A - Alphabetic	Alpha
AN -Alphanumeric	Alpha
B - Binary	Number
CD - Composite data element	N/A
CH - Character	Alpha
DT - Date	Date

ASC X12 Data Type	Format Template Data Type
FS - Fixed-length string	Alpha
ID - Identifier	Alpha
IV - Incrementing Value	Number
Nn - Numeric	Number
PW - Password	Alpha
R - Decimal number	Number
TM - Time	Date

Assume the setup commands shown in the following table.

Name	Command
NUMBER THOUSANDS SEPARATOR	.
NUMBER DECIMAL SEPARATOR	,

The following table shows the Data, Format Specifier, and Output for this case. Note that the Format Specifier requires the use of the default separators, regardless of the setup command entries.

Data	Format Specifier	Output
123456789	###,###.00	123.456.789,00
123456789.2	###.00	123456789,20
1234.56789	###.000	1234,568
123456789.2	#	123456789
123456789.2	#.##	123456789,2
123456789	#.##	123456789

## Pad

Pad applies to FIXED\_POSITION\_BASED templates only. Specify the padding side (L = left or R = right) and the character. Both numeric and alphanumeric fields can be padded. If this field isn't specified, numeric fields are left-padded with "0" and alpha fields are right-padded with spaces.

Example usage:

- To pad a field on the left with a "0", enter the following in the Pad column field:  
L, '0'
- To pad a field on the right with a space, enter the following in the Pad column field:  
R, ' '

## Data

Specifies the XML element from the data extract that is to populate the field. The data column can simply contain the XML tag name, or it can contain expressions and functions.

For more information, see [Expressions, Control Structures, and Functions](#).

## Tag

Acts as a comment column for DELIMITER\_BASED templates.

It specifies the reference tag in EDIFACT formats, and the reference IDs in ASC X12.

## Comments

Use this column to note any free form comments to the template. Usually this column is used to note the business requirement and usage of the data field.

# Set Up Command Tables

A template always begins with a table that specifies the setup commands.

The setup commands define global attributes, such as template type and output character set and program elements, such as sequencing and concatenation.

The setup commands are:

- [TEMPLATE TYPE Command](#)
- OUTPUT CHARACTER SET
- [Output Length Mode](#)
- NEW RECORD CHARACTER
- INVALID CHARACTERS
- REPLACE CHARACTERS
- NUMBER THOUSANDS SEPARATOR
- NUMBER DECIMAL SEPARATOR
- DEFINE LEVEL
- DEFINE SEQUENCE
- DEFINE CONCATENATION
- CASE CONVERSION

An example setup table is shown in the following figure:

XDO file name:  
XINT-01.rtf

*Mapping of Payment Format:*  
**International Payments EFT Format**

**Format Setup:**

*Hint: Define formatting options...*

<TEMPLATE TYPE>	FIXED_POSITION_BASED
<OUTPUT CHARACTER SET>	iso-8859-1
<NEW RECORD CHARACTER>	Carriage Return

<INVALID CHARACTERS>	z1
<REPLACE CHARACTERS>	
A	AO
E	EO
I	IO
O	OO
U	UO
<END REPLACE CHARACTERS>	

**Format Data Levels:**

*Hint: Define data levels that are needed in the format which do not exist in data extract...*

<DEFINE LEVEL>	PaymentsByPayDatePayee
<BASE LEVEL>	Payment
<GROUPING CRITERIA>	'PaymentDate, PayeeName'
<END DEFINE LEVEL>	PaymentsByPayDatePayee

<DEFINE LEVEL>	InvoicesByReportingCatAndAttrib
<BASE LEVEL>	Invoice

Here is another example setup table:



<GROUPING CRITERIA>	<pre> InvoiceTrxnReportingCat', (IF InvoiceTrxnReportingCat = 'V' THEN   'InvoiceDEVTransitGoods' END IF), (IF InvoiceTrxnReportingCat = 'V' THEN   'InvoiceDEVGoodsIndexNum' END IF), (IF InvoiceTrxnReportingCat = 'V' THEN   'InvoiceDEVPassingTrade' END IF) </pre>
<END DEFINE LEVEL>	InvoicesByReportingCatAndAttrib

### Sequences :

*Hint: Define sequence generators...*

<DEFINE SEQUENCE>	AllRecordsSeq
<RESET AT LEVEL>	PERIODIC_SEQUENCE
<INCREMENT BASIS>	RECORD
<START AT>	BaseRecordCount + 1
<MAXIMUM>	999999
<END DEFINE SEQUENCE >	AllRecordsSeq

<DEFINE SEQUENCE>	PaymentsSeq
<RESET AT LEVEL>	Batch
<INCREMENT BASIS>	LEVEL
<END DEFINE SEQUENCE >	PaymentsSeq

### Concatenated Records :

*Hint: Define fields that are composed of concatenated records...*

<DEFINE CONCATENATION>	ConcatenatedInvoiceInfo
<BASE LEVEL>	Invoice
<ELEMENT>	InvoiceNum
<DELIMITER>	','
<END DEFINE CONCATENATION>	ConcatenatedInvoiceInfo

## TEMPLATE TYPE Command

This command specifies the type of template.

There're two types: FIXED\_POSITION\_BASED and DELIMITER\_BASED.

Use the FIXED\_POSITION\_BASED templates for fixed-length record formats, such as EFTs. In these formats, all fields in a record are a fixed length. If data is shorter than the specified length, then it's padded. If longer, it's truncated. The system specifies the default behavior for data padding and truncation. Examples of fixed position based formats are EFTs in Europe, and NACHA ACH file in the U.S.

In a DELIMITER\_BASED template, data is never padded and only truncated when it reaches a maximum field length. Empty fields are allowed (when the data is null). Designated delimiters are used to separate the data fields. If a field is empty, two delimiters are displayed next to each other. Examples of delimited-based templates are EDI formats such as ASC X12 820 and UN EDIFACT formats - PAYMUL, DIRDEB, and CREMUL.

In EDI formats, a record is sometimes referred to as a segment. An EDI segment is treated the same as a record. Start each segment with a new record command and give it a record name.

You should have a data field specifying the segment name as part of the output data immediately following the new record command.

For DELIMITER\_BASED templates, you insert the appropriate data field delimiters in separate rows between the data fields. After every data field row, you insert a delimiter row. You can insert a placeholder for an empty field by defining two consecutive delimiter rows.

Empty fields are often used for syntax reasons: you must insert placeholders for empty fields so that the fields that follow can be properly identified.

There're different delimiters to signify data fields, composite data fields, and end of record. Some formats allow you to choose the delimiter characters. In all cases you should use the same delimiter consistently for the same purpose to avoid syntax errors.

In DELIMITER\_BASED templates, the <POSITION> and <PAD> columns do not apply. They're omitted from the data tables.

Some DELIMITER\_BASED templates have minimum and maximum length specifications. In those cases Oracle Payments validates the length.

## DEFINE LEVEL Command

Some formats require specific additional data levels that are not in the data extract. For example, some formats require that payments be grouped by payment date. Using the Define Level command, a payment date group can be defined and referenced as a level in the template, even though it isn't in the input extract file.

When you use the Define Level command you declare a base level that exists in the extract. The Define Level command inserts a new level, one level higher than the base level of the extract. The new level functions as a grouping of the instances of the base level.

The Define Level command is a setup command, therefore it must be defined in the setup table. It has three subcommands:

- **BASE LEVEL** command - defines the level (XML element) from the extract that the new level is based on. The Define Level command must always have one and only one base level subcommand.
- **GROUPING CRITERIA** - defines the XML extract elements that are used to group the instances of the base level to form the instances of the new level. The parameter of the grouping criteria command is a comma-separated list of elements that specify the grouping conditions.

The order of the elements determines the hierarchy of the grouping. The instances of the base level are first divided into groups according to the values of the first criterion, then each of these groups is subdivided into groups according to the second criterion, and so on. Each of the final subgroups is considered as an instance of the new level.

- **GROUP SORT ASCENDING** or **GROUP SORT DESCENDING** - defines the sorting order of the group. Insert the <GROUP SORT ASCENDING> or <GROUP SORT DESCENDING> command row anywhere between the <DEFINE LEVEL> and <END DEFINE LEVEL> commands. The parameter of the sort command is a comma-separated list of elements by which to sort the group.
- **GROUP SORT ASCENDING NUMBER** or **GROUP SORT DESCENDING NUMBER** - defines the sorting order of the numeric group. Insert the <GROUP SORT ASCENDING NUMBER> or <GROUP SORT DESCENDING NUMBER> command row anywhere between the <DEFINE LEVEL> and <END DEFINE LEVEL> commands. The parameter of the sort command is a comma-separated list of elements for sorting.

For example, the following table shows five payments under a batch.

Payment Instance	PaymentDate (grouping criterion 1)	PayeeName (grouping criterion 2)
Payment1	PaymentDate1	PayeeName1
Payment2	PaymentDate2	PayeeName1
Payment3	PaymentDate1	PayeeName2
Payment4	PaymentDate1	PayeeName1
Payment5	PaymentDate1	PayeeName3

In the template, construct the setup table as follows to create a level called PaymentsByPayDatePayee from the base level "Payment" grouped according to Payment Date and Payee Name. Add the Group Sort Ascending command to sort each group by PaymentDate and PayeeName:

Payment Group	Level
<DEFINE LEVEL>	PaymentsByPayDatePayee
<BASE LEVEL>	Payment
<GROUPING CRITERIA>	PaymentDate, PayeeName
<GROUP SORT ASCENDING>	PaymentDate, PayeeName
<END DEFINE LEVEL>	PaymentsByPayDatePayee

The five payments generate the four groups (instances) shown in the following table for the new level:

Payment Group Instance	Group Criteria	Payments in Group
Group1	PaymentDate1, PayeeName1	Payment1, Payment4
Group2	PaymentDate1, PayeeName2	Payment3
Group3	PaymentDate1, PayeeName3	Payment5
Group4	PaymentDate2, PayeeName1	Payment2

The order of the new instances is the order in which the records print. When evaluating the multiple grouping criteria to form the instances of the new level, the criteria can be thought of as forming a hierarchy. The first criterion is at the top of the hierarchy, the last criterion is at the bottom of the hierarchy.

Generally there're two kinds of format-specific data grouping scenarios in EFT formats. Some formats print the group records only; others print the groups with the individual element records nested inside groups. The following tables are two examples for these scenarios based on the five payments and grouping conditions previously illustrated and show the generated output:

#### Scenario 1: Group Records Only

EFT File Structure:

- BatchRec
  - PaymentGroupHeaderRec
  - PaymentGroupFooterRec

Record Sequence	Record Type	Description
1	BatchRec	NA
2	PaymentGroupHeaderRec	For group 1 (PaymentDate1, PayeeName1)
3	PaymentGroupFooterRec	For group 1 (PaymentDate1, PayeeName1)
4	PaymentGroupHeaderRec	For group 2 (PaymentDate1, PayeeName2)
5	PaymentGroupFooterRec	For group 2 (PaymentDate1, PayeeName2)
6	PaymentGroupHeaderRec	For group 3 (PaymentDate1, PayeeName3)
7	PaymentGroupFooterRec	For group 3 (PaymentDate1, PayeeName3)
8	PaymentGroupHeaderRec	For group 4 (PaymentDate2, PayeeName1)
9	PaymentGroupFooterRec	For group 4 (PaymentDate2, PayeeName1)

## Scenario 2: Group Records and Individual Records

### EFT File Structure:

#### BatchRec

- PaymentGroupHeaderRec
  - PaymentRec
- PaymentGroupFooterRec

Record Sequence	Record Type	Description
1	BatchRec	NA
2	PaymentGroupHeaderRec	For group 1 (PaymentDate1, PayeeName1)
3	PaymentRec	For Payment1
4	PaymentRec	For Payment4
5	PaymentGroupFooterRec	For group 1 (PaymentDate1, PayeeName1)
6	PaymentGroupHeaderRec	For group 2 (PaymentDate1, PayeeName2)
7	PaymentRec	For Payment3
8	PaymentGroupFooterRec	For group 2 (PaymentDate1, PayeeName2)
9	PaymentGroupHeaderRec	For group 3 (PaymentDate1, PayeeName3)
10	PaymentRec	For Payment5
11	PaymentGroupFooterRec	For group 3 (PaymentDate1, PayeeName3)
12	PaymentGroupHeaderRec	For group 4 (PaymentDate2, PayeeName1)
13	PaymentRec	For Payment2
14	PaymentGroupFooterRec	For group 4 (PaymentDate2, PayeeName1)

Once defined with the Define Level command, the new level can be used in the template in the same manner as a level occurring in the extract. However, the records of the new level can only reference the base level fields that are defined in its grouping criteria. They cannot reference other base level fields other than in summary functions.

For example, the PaymentGroupHeaderRec can reference the PaymentDate and PayeeName in its fields. It can also reference the PaymentAmount (a payment level field) in a SUM

function. However, it cannot reference other payment level fields, such as PaymentDocName or PaymentDocNum.

The DEFINE LEVEL command must always have one and only one grouping criteria subcommand. The DEFINE LEVEL command has a companion END DEFINE LEVEL command. The subcommands must be specified between the DEFINE LEVEL and END DEFINE LEVEL commands. They can be declared in any order.

## DEFINE SEQUENCE Command

The DEFINE SEQUENCE command defines a sequence that can be used in conjunction with the SEQUENCE\_NUMBER function to index either the generated EFT records or the extract instances (the database records). The EFT records are the physical records defined in the template. The database records are the records from the extract. To avoid confusion, the term *record* always refers to the EFT record. The database record is referred to as an extract element instance or level.

The DEFINE SEQUENCE command has four subcommands: RESET AT LEVEL, INCREMENT BASIS, START AT, MINIMUM, and MAXIMUM:

### RESET AT LEVEL

The RESET AT LEVEL subcommand defines where the sequence resets its starting number.

RESET AT LEVE is a mandatory subcommand. For example, to number the payments in a batch, define RESET AT LEVEL as Batch. To continue numbering across batches, define RESET AT LEVEL as RequestHeader.

In some cases the sequence is reset outside the template. For example, a periodic sequence may be defined to reset by date. In these cases, the PERIODIC\_SEQUENCE keyword is used for the RESET AT LEVEL. The system saves the last sequence number used for a payment file to the database. Outside events control resetting the sequence in the database. For the next payment file run, the sequence number is extracted from the database for the start at number (see start at subcommand).

### INCREMENT BASIS

The INCREMENT BASIS subcommand specifies if the sequence should be incremented based on record or extract instances. The allowed parameters for this subcommand are RECORD and LEVEL.

Enter RECORD to increment the sequence for every record.

Enter LEVEL to increment the sequence for every new instance of a level.

Note that for levels with multiple records, if you use the level-based increment, then all the records in the level have the same sequence number. The record-based increment assigns each record in the level a new sequence number.

For level-based increments, the sequence number can be used in the fields of one level only. For example, suppose an extract has a hierarchy of batch > payment > invoice and you define the INCREMENT BASIS by level sequence, with reset at the batch level. You can use the sequence in either the payment or invoice level fields, but not both. You cannot have sequential numbering across hierarchical levels.

However, this rule doesn't apply to increment basis by record sequences. Records can be sequenced across levels.

For both increment basis by level and by record sequences, the level of the sequence is implicit based on where the sequence is defined.

## MINIMUM

Specifies the minimum sequence number.

If MINIMUM isn't declared, the minimum sequence number is set as 1 by default.

Specify this value when you want the minimum sequence number to be a value other than 1.

## Define Concatenation Command

Use the define concatenation command to concatenate child-level extract elements for use in parent-level fields.

For example, use this command to concatenate invoice number and due date for all the invoices belonging to a payment for use in a payment-level field.

The define concatenation command has three subcommands: base level, element, and delimiter.

## Base Level Subcommand

The base level subcommand specifies the child level for the operation.

For each parent-level instance, the concatenation operation loops through the child-level instances to generate the concatenated string.

## Element Subcommand

The element subcommand specifies the operation used to generate each element. An element is a child-level expression that is concatenated to generate the concatenation string.

## Delimiter Subcommand

The delimiter subcommand specifies the delimiter to separate the concatenated items in the string.

## Use the SUBSTR Function

Use the SUBSTR function to break down concatenated strings into smaller strings that can be placed into different fields.

For example, the following table shows five invoices in a payment.

Invoice	InvoiceNum
1	car_parts_inv0001
2	car_parts_inv0002
3	car_parts_inv0003
4	car_parts_inv0004
5	car_parts_inv0005

Using the concatenation definition shown in the following table:

Level	Definition
<DEFINE CONCATENATION>	ConcatenatedInvoiceInfo
<BASE LEVEL>	Invoice
<ELEMENT>	InvoiceNum
<DELIMITER>	','
<END DEFINE CONCATENATION>	ConcatenatedInvoiceInfo

You can reference ConcatenatedInvoiceInfo in a payment level field. The string is as follows:

```
car_parts_inv0001,car_parts_inv0002,car_parts_inv0003,car_parts_inv0004,car_parts_inv0005
```

If you want to use only the first forty characters of the concatenated invoice information, then use either TRUNCATE function or the SUBSTR function as follows:

```
TRUNCATE(ConcatenatedInvoiceInfo, 40)
```

```
SUBSTR(ConcatenatedInvoiceInfo, 1, 40)
```

Either of these statements result in:

```
car_parts_inv0001,car_parts_inv0002,car_
```

To isolate the next forty characters, use the SUBSTR function:

```
SUBSTR(ConcatenatedInvoiceInfo, 41, 40)
```

to get the following string:

```
parts_inv0003,car_parts_inv0004,car_par
```

## Invalid Characters and Replacement Characters Commands

Some formats require a different character set than the one that was used to enter the data in Oracle Applications. For example, some German formats require the output file in ASCII, but the data was entered in German. If there's a mismatch between the original and target character sets you can define an ASCII equivalent to replace the original. For example, you would replace the German umlauted "a" with "ao".

Some formats don't allow certain characters. To ensure that known invalid characters are not transmitted in the output file, use the invalid characters command to flag occurrences of specific characters.

To use the replacement characters command, specify the source characters in the left column and the replacement characters in the right column. You must enter the source characters in the original character set. This is the only case in a format template in which you use a character set not intended for output. Enter the replacement characters in the required output character set.

For DELIMITER\_BASED formats, if there're delimiters in the data, you can use the escape character "?" to retain their meaning. For example,

First name?+Last name equates to First name+Last name

Which source?? equates to Which source?

Note that the escape character itself must be escaped if it's used in data.

The replacement characters command can be used to support the escape character requirement. Specify the delimiter as the source and the escape character plus the delimiter as the target. For example, the command entry for the preceding examples is as follows:

```
<REPLACEMENT CHARACTERS>
+ ?+
? ??
<END REPLACEMENT CHARACTERS>
```

The invalid character command has a single parameter that is a string of invalid characters that causes the system to error out.

The replacement character process is performed before or during the character set conversion. The character set conversion is performed on the XML extract directly, before the formatting. After the character set conversion, the invalid characters are checked in terms of the output character set. If no invalid characters are found, then the system proceeds to formatting.

## Output Character Set and New Record Character Commands

Use the new record character command to specify the character(s) to delimit the explicit and implicit record breaks at runtime.

Each new record command represents an explicit record break. Each end of table represents an implicit record break. The parameter is a list of constant character names separated by commas.

Some formats contain no record breaks. The generated output is a single line of data. In this case, leave the new record character command parameter field empty.

If you do not define a "new record character" field in the template, then the system sets "\n" as default new record character.

## Output Length Mode

Output Length Mode can be set to "character" or "byte".

When OUTPUT LENGTH MODE is set to "character", the output record length for each field is based on character length. When OUTPUT LENGTH MODE is set to "byte", the output record length for each field is based on byte length.

If no OUTPUT LENGTH MODE is setting is provided, "character" is used.

## Number Thousands Separator and Number Decimal Separator

The default thousands (or group) separator is a comma (",") and the default decimal separator is a period ("."). Use the Number Thousands Separator command and the Number Decimal Separator command to specify separators other than the defaults.

For example, to define "." as the group separator and "," as the decimal separator, enter the commands as follows:

```
<NUMBER THOUSANDS SEPARATOR> .
<NUMBER DECIMAL SEPARATOR> ,
```



Note that when you set "NUMBER DECIMAL SEPARATOR", you must also set "NUMBER THOUSANDS SEPARATOR". Ensure to set the appropriate format mask for the field to be displayed. For more information on formatting numbers, see [Format Column](#).

## CASE CONVERSION

Use CASE CONVERSION to convert strings from lowercase to uppercase for fields with format type ALPHA. This command is used with FIXED\_POSITION\_BASED templates.

Valid values are "UPPER" and "LOWER". Enter the command as follows:

```
<CASE CONVERSION> : UPPER
```

## Create a Filler Block

For FIXED\_POSITION\_BASED templates, you can use a filler block to define a specific block size for the eText output. When the actual data doesn't fill the specified block size, the remainder of the block is filled with a specified filler character.

For example, if you define a BLOCK SIZE of 9, and the eText output generated is only three lines of text, then the remaining six lines are filled with the specified FILLER CHARACTER.

The commands used are:

- `<BEGIN FILLER BLOCK>` - this signifies the beginning of the block. Enter a name for this block.
- `<FILLER CHARACTER>` - enter a character or string to use to "fill" the remainder of the block when the data doesn't fill it.

Example entries for `<FILLER CHARACTER>` are:

To fill the block with the ? character, enter the FILLER CHARACTER command as shown:

```
<FILLER CHARACTER> : ?
```

To fill the block with the string abc, enter the FILLER CHARACTER command as shown:

```
<FILLER CHARACTER> : abc
```

To fill the block with empty spaces, enter the FILLER CHARACTER command as shown:

```
<FILLER CHARACTER> :
```

- `<BLOCK SIZE>` - enter an integer to specify the size of the block in lines of text.

These commands must be used before the template definition starts.

Enter the following command at the end of the block:

- `<END FILLER BLOCK>` - signifies the end of the block. Enter the name already specified for this block in the `<BEGIN FILLER BLOCK>` command.

The following figure shows an example of filler block usage:

<BEGIN FILLER BLOCK>	PaymentsBlock
<FILLER CHARACTER>	?
<BLOCK SIZE>	5

<LEVEL>		OutboundPayment			
<SORT ASCENDING>		Payee/Name			
<POSITION>	<LENGTH>	<FORMAT>	<PAD>	<DATA>	<COMMENTS>
<NEW RECORD>		EntryDetailRecCR			
1	1	Number		6	Record type
2	2	Alpha	L, ' '	IF PaymentAmount/Value = 0 THEN '23' ELSE '22' END IF	Transaction Code
4	8	Alpha	L, '0'	PayeeBankAccount/Bank Number	Receiving DFI Identification. Let BI Publisher do the truncation
12	1	Alpha	L, '0'	SUBSTR(PayeeBankAccou nt/BankNumber,9,1)	Check digit. The validation code will make sure that the BankNumber is 9 digits. You don't need to use the LENGTH function here.
13	17	Alpha	L, '0'	PayeeBankAccount/Bank AccountNumber	DFI Account Number
30	10	Number, Integer	L, '0'	PaymentAmount/Value*1 00	Amount
40	15	Alpha	L, '0'	PaymentNumber/CheckNu mber	Identification Number
55	22	Alpha	R, ' '	Payee/Name	Receiving Company Name/ID Number
77	2	Alpha	R, ' '		Discretionary Data
79	1	Number		0	Addenda record Indicator
80	8	Alpha	L, '0'	/OutboundPaymentInstr uction/PayerInstrumen t/BankAccount/BankNum ber	ODFI Routing Number
88	7	Alpha	R, '0'	SEQUENCE_NUMBER( PaymentsSeq)	Trace Number. Currently in code this is a counter - CS_CHECK_NUM which counts C_ENTRYDETAIL and resets at G_C_BATCHHEADER. So we need a sequence number that will generate a sequence for each of the payments starting from 1.
<END LEVEL>		OutboundPayment			
<END FILLER BLOCK>		PaymentsBlock			

The following figure shows an example of output generated with FILLER BLOCK:

[illegible]

The following figure shows an example of output generated if FILLER BLOCK isn't used:

```
6220005396600000000234784342000015330000000000000000AMERICAN POWER CONVERS 000000001000000
622000005390000539-0075470-3400013000560000000000000000BELGIAN COMPUTER      00000000020000000
622000000000000000000000000000000000000000000000000000657398000000000000000000BELGIAN COMPUTER      00000000030000000
```

# Expressions, Control Structures, and Functions

This section describes the rules and usage for expressions in the template. It also describes supported control structures and functions.

## Expressions

Expressions can be used in the data column for data fields and some command parameters. An expression is a group of XML extract fields, literals, functions, and operators. Expressions can be nested. An expression can also include the "IF" control structure. When an expression is evaluated it always generates a result. Side effects are not allowed for the evaluation.

Based on the evaluation result, expressions are classified into the following three categories:

- **Boolean Expression** - an expression that returns a boolean value, either true or false. This kind of expression can be used only in the IF-THEN-ELSE control structure and the parameter of the display condition command.
- **Numeric Expression** - an expression that returns a number. This kind of expression can be used in numeric data fields. It can also be used in functions and commands that require numeric parameters.
- **Character Expression** - an expression that returns an alphanumeric string. This kind of expression can be used in string data fields (format type Alpha). They can also be used in functions and command that require string parameters.

# Control Structures

The only supported control structure is IF-THEN-ELSE. It can be used in an expression.

The syntax is:

```
IF <boolean_expressionA> THEN
  <numeric or character expression1>
[ELSIF <boolean_expressionB THEN
  <numeric or character expression2>]
...
[ELSE
  <numeric or character expression3>]
END IF
```

Generally the control structure must evaluate to a number or an alphanumeric string. The control structure is considered to a numeric or character expression. The ELSIF and ELSE clauses are optional, and there can be as many ELSIF clauses as necessary. The control structure can be nested.

The IN predicate is supported in the IF-THEN-ELSE control structure. For example:

```
IF PaymentAmount/Currency/Code IN ('USD', 'EUR', 'AON', 'AZM') THEN
  PayeeAccount/FundsCaptureOrder/OrderAmount/Value * 100
ELSIF PaymentAmount/Currency/Code IN ('BHD', 'IQD', 'KWD') THEN
  PayeeAccount/FundsCaptureOrder/OrderAmount/Value * 1000
ELSE
  PayeeAccount/FundsCaptureOrder/OrderAmount/Value
END IF;
```

## Functions

Here is the list of supported functions.

- **SEQUENCE\_NUMBER** - Is a record element index. It's used in conjunction with the Define Sequence command. It has one parameter, which is the sequence defined by the Define Sequence command. At runtime it increases its sequence value by one each time it's referenced in a record.
- **COUNT** - Counts the child level extract instances or child level records of a specific type. Declare the COUNT function on a level above the entity to be counted. The function has one argument. If the argument is a level, then the function counts all the instances of the (child) level belonging to the current (parent) level instance.

Example: If the level to be counted is Payment and the current level is Batch, then the COUNT returns the total number of payments in the batch. However, if the current level is RequestHeader, the COUNT returns the total number of payments in the file across all batches. If the argument is a record type, the count function counts all the generated records of the (child level) record type belonging to the current level instance.

- **INTEGER\_PART, DECIMAL\_PART** - Returns the integer or decimal portion of a numeric value. This is used in nested expressions and in commands (display condition and group by). For the final formatting of a numeric field in the data column, use the Integer/Decimal format.
- **IS\_NUMERIC** - Boolean test whether the argument is numeric. Used only with the "IF" control structure.
- **TRUNCATE** - Truncates the first argument - a string to the length of the second argument. If the first argument is shorter than the length specified by the second argument, the first argument is returned unchanged. This is a user-friendly version for a subset of the SQL substr() functionality.
- **SUM** - Sums all the child instance of the XML extract field argument. The field must be a numeric value. The field to be summed must always be at a lower level than the level on which the SUM function was declared.
- **MIN, MAX** - Finds the minimum or maximum of all the child instances of the XML extract field argument. The field must be a numeric value. The field to be operated on must always be at a lower level than the level on which the function was declared.
- **FORMAT\_DATE** - Formats a date string to any desirable date format. For example:  
 FORMAT\_DATE("1900-01-01T18:19:20", "YYYY/MM/DD HH24:MI:SS")  
 produces the following output:  
 1900/01/01 18:19:20
- **FORMAT\_NUMBER** - Formats a number to display in desired format. For example:  
 FORMAT\_NUMBER("1234567890.0987654321", "999,999.99")

produces the following output:

1,234,567,890.10

- MESSAGE\_LENGTH - Returns the length of the message in the EFT message.
- RECORD\_LENGTH - Returns the length of the record in the EFT message.
- INSTR - Returns the numeric position of a named character within a text field.
- SYSDATE, DATE - Gets Current Date and Time.
- POSITION - Returns the position of a node in the XML document tree structure.
- REPLACE - Replaces a string with another string.
- CONVERT\_CASE - Converts a string or a character to UPPER or LOWER case.
- CHR - Gets the character representation of an argument, which is an ASCII value.
- LPAD, RPAD - Generates left or right padding for string values.
- AND, OR, NOT - Operator functions on elements.
- AddToVar - Adds the specified value to the current value of the variable, and returns the value added to the variable. If the assignment is unsuccessful, the function returns 0. If the variable doesn't exist, the function creates a new variable and assigns the specified value.

Usage: AddToVar(*var-name*,*value-to-be-added*)

Example:

AddToVar('MyVAR', 10) - if MyVar=0, assigns 10 to MyVar, and returns 10.

AddToVar('MyVAR', 20) - if MyVar=10, adds 20 to MyVar, assigns 30 to MyVar, and returns 20.

- GetVar - Returns the value of the specified variable. Returns 0 if the variable doesn't exist.

Usage: GetVar(*var-name*)

Example: GetVar('MyVAR')

- ResetVar - Resets the value of the variable to 0.

Usage: ResetVar(*var-name*)

Example: ResetVar('MyVAR')

- SetVar - Assigns the specified value to the variable, and returns the assigned value.

Usage: SetVar(*var-name*, *value-to-be-assigned*)

Example: SetVar('MyVAR', 1200)

- DISTINCT\_VALUES - Returns a sequence in which all but one of a set of duplicate values, based on value equality, have been deleted. Equivalent to the XPATH function DISTINCT-VALUES. Usage: distinct\_values(*fieldname*).

- INCREASE\_DATE - Increments a date by the number of days specified.

Usage:

increase\_date(*//date*, 2)

returns a date value two days after the value of *//date*

- DECREASE\_DATE - Decreases a date by the number of days specified.

Usage:

decrease\_date(*//date*, 2)

returns a date value two before the value of `./date`

- XPATH - Allows direct injection of pure XPath language to generate the XSL template.

Example:

```
XPATH('sum((../PRE_TAX_DEDUCTIONS/PAYMENT)[position() >= 9])')
```

```
XPATH('sum((../PRE_TAX_DEDUCTIONS/PAYMENT)[NAME = 'NULL'])')
```

- Other SQL functions include the following. Use the syntax corresponding to the SQL function.
  - TO\_DATE
  - LOWER
  - UPPER
  - LENGTH
  - GREATEST
  - LEAST
  - DECODE
  - CEIL
  - ABS
  - FLOOR
  - ROUND
  - CHR
  - TO\_CHAR
  - SUBSTR
  - LTRIM
  - RTRIM
  - TRIM
  - IN
  - TRANSLATE

## Identifiers, Operators, and Literals

This section lists the reserved key word and phrases and their usage. The supported operators are defined and the rules for referencing XML extract fields and using literals.

### Key Words

There're several categories of key words and key word phrases:

- Command and column header key words
- Command parameter and function parameter key words
- Field-level key words
- Expression key words

## Command and Column Header Key Words

The command and column header key words must be used in the format shown: enclosed in `<>`s and in all capital letters with a bold font.

- **<LEVEL>** - the first entry of a data table. Associates the table with an XML element and specifies the hierarchy of the table.
- **<END LEVEL>** - declares the end of the current level. Can be used at the end of a table or in a standalone table.
- **<POSITION>** - column header for the first column of data field rows, which specifies the starting position of the data field in a record.
- **<LENGTH>** - column header for the second column of data field rows, which specifies the length of the data field.
- **<FORMAT>** - column header for the third column of data field rows, which specifies the data type and format setting.
- **<PAD>** - column header for the fourth column of data field rows, which specifies the padding style and padding character.
- **<DATA>** - column header for the fifth column of data field rows, which specifies the data source.
- **<COMMENT>** - column header for the sixth column of data field rows, which allows for free form comments.
- **<NEW RECORD>** - specifies a new record.
- **<DISPLAY CONDITION>** - specifies the condition when a record should be printed.
- **<TEMPLATE TYPE>** - specifies the type of the template, either `FIXED_POSITION_BASED` or `DELIMITER_BASED`.
- **<OUTPUT CHARACTER SET>** - specifies the character set to be used when generating the output.
- **<NEW RECORD CHARACTER>** - specifies the character(s) to use to signify the explicit and implicit new records at runtime.
- **<DEFINE LEVEL>** - defines a format-specific level in the template.
- **<BASE LEVEL>** - subcommand for the define level and define concatenation commands.
- **<GROUPING CRITERIA>** - subcommand for the define level command.
- **<END DEFINE LEVEL>** - signifies the end of a level.
- **<DEFINE SEQUENCE>** - defines a record or extract element based sequence for use in the template fields.
- **<RESET AT LEVEL>** - subcommand for the define sequence command.
- **<INCREMENT BASIS>** - subcommand for the define sequence command.
- **<START AT>** - subcommand for the define sequence command.
- **<MAXIMUM>** - subcommand for the define sequence command.
- **<MINIMUM>** - subcommand for the define sequence command.
- **<MAXIMUM LENGTH>** - column header for the first column of data field rows, which specifies the maximum length of the data field. For `DELIMITER_BASED` templates only.
- **<END DEFINE SEQUENCE>** - signifies the end of the sequence command.



- **<DEFINE CONCATENATION>** - defines a concatenation of child level elements that can be referenced as a string in the parent level fields.
- **<ELEMENT>** - subcommand for the define concatenation command.
- **<DELIMITER>** - subcommand for the define concatenation command.
- **<END DEFINE CONCATENATION>** - signifies the end of the define concatenation command.
- **<SORT ASCENDING>** - format-specific sorting for the instances of a level.
- **<SORT DESCENDING>** - format-specific sorting for the instances of a level.
- **<SORT ASCENDING NUMBER>** - numeric sorting for the instances of a level.
- **<SORT DESCENDING NUMBER>** - numeric sorting for the instances of a level.

## Command Parameter and Function Parameter Key Words

The command parameter and function parameter key words must be entered in all capital letters, non-bold fonts.

- **PERIODIC\_SEQUENCE** - used in the reset at level subcommand of the define sequence command. It denotes that the sequence number is to be reset outside the template.
- **FIXED\_POSITION\_BASED, DELIMITER\_BASED** - used in the template type command, specifies the type of template.
- **RECORD, LEVEL** - used in the increment basis subcommand of the define sequence command. **RECORD** increments the sequence each time it's used in a new record. **LEVEL** increments the sequence only for a new instance of the level.

## Field-Level Key Words

This section gives a list of key words and specifies the data type for each.

- **Alpha** - in the **<FORMAT>** column, specifies the data type is alphanumeric.
- **Number** - in the **<FORMAT>** column, specifies the data type is numeric.
- **Integer** - in the **<FORMAT>** column, used with the **Number** key word. Takes the integer part of the number. This has the same functionality as the **INTEGER** function, except the **INTEGER** function is used in expressions, while the **Integer** key word is used in the **<FORMAT>** column only.
- **Decimal** - in the **<FORMAT>** column, used with the **Number** key word. Takes the decimal part of the number. This has the same functionality as the **DECIMAL** function, except the **DECIMAL** function is used in expressions, while the **Decimal** key word is used in the **<FORMAT>** column only.
- **Date** - in the **<FORMAT>** column, specifies the data type is date.
- **L, R** - in the **<PAD>** column, specifies the side of the padding (Left or Right).

## Expression Key Words

Key words and phrases used in expressions must be in capital letters and bold fonts.

- **IF THEN ELSE IF THEN ELSE END IF** - these key words are always used as a group. They specify the "IF" control structure expressions.



- IS NULL, IS NOT NULL - these phrases are used in the IF control structure. They form part of boolean predicates to test if an expression is NULL or not NULL.

## Operators

There're two groups of operators: the boolean test operators and the expression operators.

The boolean test operators include: "=", "<>", "<", ">", ">=", and "<=". They can be used only with the IF control structure. The expression operators include: "()", "||", "+", "-", and "\*". They can be used in any expression.

The following table lists the operators and describes their usage.

Symbol	Usage
=	Equal to test. Used in the IF control structure only.
<>	Not equal to test. Used in the IF control structure only.
>	Greater than test. Used in the IF control structure only.
<	Less than test. Used in the IF control structure only.
>=	Greater than or equal to test. Used in the IF control structure only.
<=	Less than or equal to test. Used in the IF control structure only.
()	Function argument and expression group delimiter. The expression group inside "()" is always be evaluated first. "()" can be nested.
	Union operator to be used in the <LEVEL> element.
	String concatenation operator.
+	Addition operator. Implicit type conversion may be performed if any of the operands aren't numbers.
-	Subtraction operator. Implicit type conversion may be performed if any of the operands aren't numbers.
*	Multiplication operator. Implicit type conversion may be performed if any of the operands aren't numbers.
DIV	Division operand. Implicit type conversion may be performed if any of the operands are not numbers. Note that "/" isn't used because it's part of the XPATH syntax.
IN	Equal-to-any-member-of test.
NOT IN	Negates the IN operator. Not-Equal-to-any-member-of test.

## Reference to XML Extract Fields and XPATH Syntax

XML elements can be used in any expression.

At runtime XML elements are replaced with the corresponding field values. The field names are case-sensitive.

When the XML extract fields are used in the template, they must follow the XPATH syntax. This is required so that the Publisher can correctly interpret the XML elements.

There's always an extract element considered as the context element during the Publisher formatting process. When Publisher processes the data rows in a table, the level element of the table is the context element. For example, when Publisher processes the data rows in the Payment table, Payment is the context element. The relative XPATH you use to reference the extract elements are specified in terms of the context element.

For example to refer to the PayeeName element in a Payment data table, specify the following relative path:

```
Payee/PayeeInfo/PayeeName
```

Each layer of the XML element hierarchy is separated by a backslash "/". You use this notation for any nested elements. The relative path for the immediate child element of the level is just the element name itself. For example, you can use TransactionID element name as is in the Payment table.

To reference a parent level element in a child level table, you can use the "../" notation. For example, in the Payment table if you must reference the BatchName element, you can specify ../BatchName. The "../" provides Batch as the context; in that context you can use the BatchName element name directly as BatchName is an immediate child of Batch. This notation goes up to any level for the parent elements. For example if you must reference the RequesterParty element (in the RequestHeader) in a Payment data table, you can specify the following:

```
../TrxnParties/RequesterParty
```

You can always use the absolute path to reference any extract element anywhere in the template. The absolute path starts with a backslash "/". For the PayeeName in the Payment table example above, you have the following absolute path: /BatchRequest/Batch/Payment/Payee/PayeeInfo/PayeeName

The absolute path syntax provides better performance.

The identifiers defined by the setup commands such as define level, define sequence and define concatenation are considered to be global. They can be used anywhere in the template. No absolute or relative path is required. The base level and reset at level for the setup commands can also be specified. Publisher can find the correct context for them.

If you use relative path syntax, then you should specify it relative to the base levels in the following commands:

- The element subcommand of the define concatenation command
- The grouping criteria subcommand of the define level command

The extract field reference in the start at subcommand of the define sequence command should be specified with an absolute path.

The rule to reference an extract element for the level command is the same as the rule for data fields. For example, if you have a Batch level table and a nested Payment level table, then you can specify the Payment element name as-is for the Payment table. Because the context for evaluating the Level command of the Payment table is the Batch.

However, if you skip the Payment level and you have an Invoice level table directly under the Batch table, then you must specify Payment/Invoice as the level element for the Invoice table.

The XPATH syntax required by the template is very similar to UNIX/LINUX directory syntax. The context element is equivalent to the current directory. You can specify a file relative to the current directory or you can use the absolute path which starts with a "/".

Finally, the extract field reference as the result of the grouping criteria sub-command of the define level command must be specified in single quotes. This tells the Publisher engine to use the extract fields as the grouping criteria, not their values.

## Notes on Viewing eText Output from a Browser

If the report data contains Simplified Chinese characters and the <OUTPUT CHARACTER SET> is set to GBK, then the Chinese characters do not display properly in Internet Explorer 7 with gbk2312 encoding.

This issue may also occur in other non-English encodings as well, such as native Japanese and Korean. The output renders appropriately with Firefox 3.5, when setting the character set to be GBK in the eText template and setting the browser encoding to be GBK or GB2312. You can work around this issue by setting <OUTPUT CHARACTER SET> to utf-8. Note that this is a browser display issue only. The text file is generated correctly.

# Set Report Processing and Output Document Properties

This topic describes how to configure report processing and output document properties.

## Topics:

- [Overview](#)
- [PDF Output Properties](#)
- [PDF Digital Signature Properties](#)
- [PDF Accessibility Properties](#)
- [PDF/A Output Properties](#)
- [PDF/X Output Properties](#)
- [DOCX Output Properties](#)
- [RTF Output Properties](#)
- [PPTX Output Properties](#)
- [HTML Output Properties](#)
- [FO Processing Properties](#)
- [RTF Template Properties](#)
- [XPT Template Properties](#)
- [PDF Template Properties](#)
- [Excel Template Properties](#)
- [CSV Output Properties](#)
- [Excel Output Properties](#)
- [EText Output Properties](#)
- [All Outputs Properties](#)
- [Define Font Mappings](#)

## Overview

The **Formatting** tab of the Report Properties dialog enables you to set runtime formatting properties at the report level.

These properties are also set at the system level. If conflicting values are set for a property at each level, the report level takes precedence.

1. Open the report in the Report Editor.
2. Click **Properties** to display the Report Properties dialog.
3. Click the **Formatting** tab to display the formatting properties.

4. For each property, you can update the **Report Value**. The **Server Value** is shown for reference.

## PDF Output Properties

Generate the type of PDF files you want by setting the PDF output properties.

Property Name	Description	Default
Compress PDF output	Specify "true" or "false" to control compression of the output PDF file.	true
Hide PDF viewer's menu bars	Specify "true" to hide the viewer application's menu bar when the document is active. The menu bar option is only effective when using the Export button, which displays the output in a standalone Acrobat Reader application outside of the browser.	false
Hide PDF viewer's tool bars	Specify "true" to hide the viewer application's toolbar when the document is active.	false
Replace smart quotes	Specify "false" if you don't want curly quotes replaced with straight quotes in the PDF output.	true
Disable opacity and gradient shading for DVT chart	Specify "true" if you don't want opacity and gradient shading for the PDF output. This reduces the size of the PostScript file.	false
Enable PDF Security	Specify "true" if you want to encrypt the PDF output. You can then also specify the following properties: <ul style="list-style-type: none"> <li>Open document password</li> <li>Modify permissions password</li> <li>Encryption Level</li> </ul>	false
Open document password	This password is required for opening the document. It enables users to open the document only. This property is enabled only when "Enable PDF Security" is set to "true".  When you set the Encryption level to Low, Medium, or High, the password must contain only Latin-1 characters and shouldn't be more than 32 bytes long.  When you set the Encryption level to Highest, if your password exceeds 127 bytes, only the first 127 bytes of the password are used for authentication.	N/A

Property Name	Description	Default
Modify permissions password	<p>This password enables users to override the security setting. This property is effective only when "Enable PDF Security" is set to "true".</p> <p>When you set the Encryption level to Low, Medium, or High, the password must contain only Latin-1 characters and shouldn't be more than 32 bytes long.</p> <p>When you set the Encryption level to Highest, if your password exceeds 127 bytes, only the first 127 bytes of the password are used for authentication.</p> <p>If you set a password in the pdf-open-password property without setting a password in the pdf-permissions-password property, or if you set the same password in both the pdf-open-password and pdf-permissions-password properties, the user gets full access to the document and its features, and permission settings such as "Disable printing" are bypassed or ignored.</p>	N/A
Encryption level	<p>Specify the encryption level for the output PDF file. The possible values are:</p> <ul style="list-style-type: none"> <li>0: Low (40-bit RC4, Acrobat 3.0 or later)</li> <li>1: Medium (128-bit RC4, Acrobat 5.0 or later)</li> <li>2: High (128-bit AES, Acrobat 7.0 or later)</li> <li>3: Highest (256-bit AES, Acrobat X (10) or later)</li> </ul> <p>This property is effective only when "Enable PDF Security" is set to "true". When Encryption level is set to 0, you can also set the following properties:</p> <ul style="list-style-type: none"> <li>Disable printing</li> <li>Disable document modification</li> <li>Disable context copying, extraction, and accessibility</li> <li>Disable adding or changing comments and form fields</li> </ul> <p>When Encryption level is set to 1 or higher, the following properties are available:</p> <ul style="list-style-type: none"> <li>Enable text access for screen readers</li> <li>Enable copying of text, images, and other content</li> <li>Allowed change level</li> <li>Allowed printing level</li> </ul>	2 - high
Disable document modification	Permission available when "Encryption level" is set to 0. When set to "true", the PDF file cannot be edited.	false
Disable printing	Permission available when "Encryption level" is set to 0. When set to "true", printing is disabled for the PDF file.	false
Disable adding or changing comments and form fields	Permission available when "Encryption level" is set to 0. When set to "true", the ability to add or change comments and form fields is disabled.	false

Property Name	Description	Default
Disable context copying, extraction, and accessibility	Permission available when "Encryption level" is set to 0. When set to "true", the context copying, extraction, and accessibility features are disabled.	false
Enable text access for screen readers	Permission available when "Encryption level" is set to 1 or higher. When set to "true", text access for screen reader devices is enabled.	true
Enable copying of text, images, and other content	Permission available when "Encryption level" is set to 1 or higher. When set to "true", copying of text, images, and other content is enabled.	false
Allowed change level	<p>Permission available when "Encryption level" is set to 1 or higher. Valid Values are:</p> <ul style="list-style-type: none"> <li>• 0: none</li> <li>• 1: Allows inserting, deleting, and rotating pages</li> <li>• 2: Allows filling in form fields and signing</li> <li>• 3: Allows commenting, filling in form fields, and signing</li> <li>• 4: Allows all changes except extracting pages</li> </ul>	0
Allowed printing level	<p>Permission available when "Encryption level" is set to 1 or higher. Valid values are:</p> <ul style="list-style-type: none"> <li>• 0: None</li> <li>• 1: Low resolution (150 dpi)</li> <li>• 2: High resolution</li> </ul>	0
Use only one shared resources object for all pages	<p>The default mode of Publisher creates one shared resources object for all pages in a PDF file. This mode has the advantage of creating an overall smaller file size. However, the disadvantages are the following:</p> <ul style="list-style-type: none"> <li>• Viewing may take longer for a large file with many SVG objects</li> <li>• If you choose to break up the file by using Adobe Acrobat to extract or delete portions, then the edited PDF files are larger because the single shared resource object (that contains all of the SVG objects for the entire file) is included with each extracted portion.</li> </ul> <p>Setting this property to "false" creates a resource object for each page. The file size is larger, but the PDF viewing is faster and the PDF can be broken up into smaller files more easily.</p>	true
PDF Navigation Panel Initial View	<p>Controls the navigation panel view presented when a user first opens a PDF report. The following options are supported:</p> <ul style="list-style-type: none"> <li>• Panels Collapsed - displays the PDF document with the navigation panel collapsed.</li> <li>• Bookmarks Open (default) - displays the bookmark links for easy navigation.</li> <li>• Pages Open - displays a clickable thumbnail view of each page of the PDF.</li> </ul>	Bookmarks Open

## PDF Digital Signature Properties

You set the properties to enable a digital signature for PDF reports and to define the placement of the signature in the output PDF report.

At the instance level or at the report level, you can set the properties to enable a digital signature for PDF reports. You must first register at least one digital signature, so you can select the one to use in your instance or reports. To implement the digital signature for a report based on a PDF layout template or an RTF layout template, set the **Enable Digital Signature** property on the report to "true."

You also must set the appropriate properties to place the digital signature in the desired location on your output report. Your choices for placement of the digital signature depend on the template type. The choices are as follows:

- (PDF only) Place the digital signature in a specific field by setting the **Existing signature field name** property.
- (RTF and PDF) Place the digital signature in a general location of the page (top left, top center, or top right) by setting the **Signature field location** property.
- (RTF and PDF) Place the digital signature in a specific location designated by x and y coordinates by setting the **Signature field x coordinate** and **Signature field y coordinate** properties.

If you choose this option, you can also set **Signature field width** and **Signature field height** to define the size of the field in your document.

Property Name	Description	Default	Configuration Name
Enable Digital Signature	Set this to "true" to enable a digital signature for PDF reports.	false	signature-enable
Digital signature name	Select a registered digital signature file.	N/A	signature-name
Existing signature field name	This property applies to PDF layout templates only. If the report is based on a PDF template, then you can enter a field from the PDF template in which to place the digital signature.	N/A	signature-field-name
Signature field location	This property can apply to RTF or PDF layout templates. This property provides a list that contains the following values: Top Left, Top Center, Top Right. Choose one of these general locations and Publisher inserts the digital signature to the output document, sized and positioned appropriately. If you choose to set this property, do not enter X and Y coordinates or width and height properties.	N/A	signature-field-location



Property Name	Description	Default	Configuration Name
Signature field X coordinate	This property can apply to RTF or PDF layout templates. Using the left edge of the document as the zero point of the X axis, enter the position in points that you want the digital signature to be placed from the left. For example, if you want the digital signature to be placed horizontally in the middle of an 8.5 inch by 11 inch document (that is, 612 points in width and 792 points in height), enter 306.	0	signature-field-pos-x
Signature field Y coordinate	This property can apply to RTF or PDF layout templates. Using the bottom edge of the document as the zero point of the Y axis, enter the position in points that you want the digital signature to be placed from the bottom. For example, if you want the digital signature to be placed vertically in the middle of an 8.5 inch by 11 inch document (that is, 612 points in width and 792 points in height), enter 396.	0	signature-field-pos-y
Signature field width	Enter in points (72 points equal one inch) the desired width of the inserted digital signature field. This applies only if you're also setting the <b>Signature field x coordinate</b> and <b>Signature field Y coordinate</b> properties.	0	signature-field-width
Signature field height	Enter in points (72 points equal one inch) the desired height of the inserted digital signature field. This applies only if you're also setting the <b>Signature field x coordinate</b> and <b>Signature field Y coordinate</b> properties.	0	signature-field-height

## PDF Accessibility Properties

Set the properties described in the table below to configure PDF accessibility.

Property Name	Description	Default
Make PDF output accessible	Set to "true" to make the PDF outputs accessible. Accessible PDF output contains the document title and PDF tags.	False
Use PDF/UA format for accessible PDF output	Set to "true" to use the PDF/UA format for the accessible PDF outputs.	False

## PDF/A Output Properties

Set properties to configure PDF/A output.

PDF/A output properties are described in the following table. See [Generate PDF/A Output](#).

Property Name	Description	Default	Internal Name
<b>PDF/A version</b>	Select one of the PDF/A standards. The value is set in the xmpMM:Version field of the metadata dictionary.  PDF/A-1B preserves the visual appearance and structure of the document. PDF/A-2B supports the PDF/A-1B features, preserves transparency, and uses compressed objects and XRef streams to make the PDF file size smaller. The PDF files generated by Publisher for version PDF/A-3 and PDF/A-2 are similar. PDF/A-3A is a tagged format for accessibility and PDF/A-3B is a regular untagged format that conforms with the PDF/A-3 specification.	PDF/A-1B	pdfa-version
<b>PDF/A ICC profile data</b>	The name of the ICC profile data file, for example: CoatedFOGRA27.icc  The ICC (International Color Consortium) profile is a binary file describing the color characteristics of the environment where this PDF/A file is intended to be displayed. The ICC profile that you select must have a major version below 4.  To use a specific profile data file other than the default settings in the JVM, obtain the file and place it under <Publisher repository>/Admin/Configuration. When you set this property, you must also set a value for PDF/A ICC Profile Info (pdfa-icc-profile-info).	Default profile data provided by JVM	pdfa-icc-profile-data
<b>PDF/A ICC profile info</b>	ICC profile information (required when pdfa-icc-profile-data is specified)	sRGB IEC61966 -2.1	pdfa-icc-profile-info
<b>PDF/A file identifier</b>	One or more valid file identifiers set in the xmpMM:Identifier field of the metadata dictionary. To specify more than one identifier, separate values with a comma (,).	Automatically generated file identifier	pdfa-file-identifier
<b>PDF/A document ID</b>	Valid document ID. The value is set in the xmpMM:DocumentID field of the metadata dictionary.	None	pdfa-document-id
<b>PDF/A version ID</b>	Valid version ID. The value is set in the xmpMM:VersionID field of the metadata dictionary.	None	pdfa-version-id
<b>PDF/A rendition class</b>	Valid rendition class. The value is set in the xmpMM:RenditionClass field of the metadata dictionary.	None	pdfa-rendition-class

## PDF/X Output Properties

Set properties to configure PDF/X output.

PDF/X output properties are described in the table below. The values that you set for these properties depend on the printing device. Note the following restrictions on other PDF properties:

- pdf-version - value above 1.4 isn't allowed for PDF/X-1a output
- pdf-security - must be set to False
- pdf-encryption-level - must be set to 0
- pdf-font-embedding - must be set to true

See [Generate PDF/X output](#).

Property Name	Description	Default	Internal Name
PDF/X ICC Profile Data	<p>(Required) The name of the ICC profile data file, for example: CoatedFOGRA27.icc.</p> <p>The ICC (International Color Consortium) profile is a binary file describing the color characteristics of the intended output device. For production environments, the color profile may be provided by your print vendor or by the printing company that prints the generated PDF/X file. The file must be placed under &lt;bi publisher repository&gt;/Admin/Configuration.</p>	None	pdfx-dest-output-profile-data
PDF/X output condition identifier	<p>(Required) The name of one of the standard printing conditions registered with ICC (International Color Consortium). The list of standard CMYK printing conditions to use with PDF/X-1a is provided on the following ICC website: <a href="http://www.color.org/chardata/drsection1.xalter">http://www.color.org/chardata/drsection1.xalter</a>. The value that you enter for this property is a valid "Reference name," for example: FOGRA43.</p> <p>Choose the appropriate value for the intended printing environment. This name is often used to guide automatic processing of the file by the consumer of the PDF/X document, or to inform the default settings in interactive applications.</p>	None	pdfx-output-condition-identifier

Property Name	Description	Default	Internal Name
PDF/X output condition	A string describing the intended printing condition in a form that will be meaningful to a human operator at the site receiving the exchanged file. The value is set in OutputCondition field of OutputIntents dictionary.	None	pdfx-output-condition
PDF/X registry name	A registry name. Set this property when the pdfx-output-condition-identifier is set to a characterization name that is registered in a registry other than the ICC registry.	http://www.color.org	pdfx-registry-name
PDF/X version	The PDF/X version set in GTS_PDFXVersion and GTS_PDFXConformance fields of Info dictionary. PDF/X-1a:2003 is the only value currently supported.	PDF/X-1a:2003	pdfx-version

## DOCX Output Properties

The table below describes the properties that control DOCX output files.

Property Name	Description	Default	Configuration Name
Enable change tracking	Set to "true" to enable change tracking in the output document.	false	docx-track-changes
Protect document for tracked changes	Set to "true" to protect the document for tracked changes.	false	docx-protect-document-for-tracked-changes
Default font	Use this property to define the font style and size in the output when no other font has been defined. This is particularly useful to control the sizing of empty table cells in generated reports. Enter the font name and size in the following format <FontName>:<size> for example: Arial:12. Note that the font you choose must be available to the processing engine at runtime.	Arial:12	docx-output-default-font
Open password	Use this property to specify the password that report users must provide to open any DOCX report.	NA	docx-open-password

## RTF Output Properties

You can configure RTF output with a number of predetermined properties.

Set the properties described in the table below to configure RTF output.

Property Name	Description	Default	Internal Name
Enable change tracking	Set to "true" to enable change tracking in the output RTF document.	false	rtf-track-changes
Protect document for tracked changes	Set to "true" to protect the document for tracked changes.	false	rtf-protect-document-for-tracked-changes
Default font	Use this property to define the font style and size in RTF output when no other font has been defined. This is particularly useful to control the sizing of empty table cells in generated reports. Enter the font name and size in the following format <FontName>:<size> for example: Arial:12. Note that the font you choose must be available to the Publisher processing engine at runtime.	Arial:12	rtf-output-default-font
Enable widow orphan	Set to "true" to ensure that there're no hanging paragraphs in the document. If the last para in a page contains an orphaned line and the remaining lines of the paragraph continue in the next page, the starting line of the paragraph is moved to the next page to keep the lines of the paragraph together for better readability.	false	rtf-enable-widow-orphan

## PPTX Output Properties

The table below describes the properties that control PPTX output files.

Property Name	Description	Default	Configuration Name
Open password	Use this property to specify the password that report users must provide to open any PPTX report.	NA	pptx-open-password

## HTML Output Properties

The table below describes the properties that control HTML output files.

Property Name	Description	Default	Configuration Name
Show header	Set to "false" to suppress the template header in HTML output.	true	html-show-header
Show footer	Set to "false" to suppress the template footer in HTML output.	true	html-show-footer

Property Name	Description	Default	Configuration Name
Replace smart quotes	Set to "false" if you don't want curly quotes replaced with straight quotes in the HTML output.	true	html-replace-smartquotes
Character set	Specify the output HTML character set.	UTF-8	html-output-charset
Make HTML output accessible	Set to "true" to make the HTML output accessible.	false	make-accessible
Use percentage width for table columns	Set to "true" to display table columns according to a percentage value of the total width of the table rather than as a value in points. This property is especially useful if the browser display tables with extremely wide columns. Setting this property to true improves the readability of the tables.	true	html-output-width-in-percentage
View Paginated	<p>When you set this property to true, HTML output will render in the report viewer with pagination features. These features include:</p> <ul style="list-style-type: none"> <li>• Generated table of contents</li> <li>• Navigation links at the top and bottom of the page</li> <li>• Ability to skip to a specific page within the HTML document</li> <li>• Search for strings within the HTML document using the browser's search capability</li> <li>• Zoom in and out on the HTML document using the browser's zoom capability</li> </ul> <p>Note that these features are supported for online viewing through the report viewer only.</p>	false	
Reduce Padding in Table-cell	When you set this property to true, cells in HTML tables are displayed without padding, which maximizes the page space available for text.	false	html-reduce-padding
Embed images and charts in HTML for offline viewing	When you set this property to true, charts and images are embedded in the HTML output, which is suitable for viewing offline.	false	html-use-data-uri
Use SVG for charts	When you set this property to true, charts display as a SVG (Scalable Vector Graphic) to provide a higher resolution in the HTML output. When you set this property to false, charts display as a raster image.	true	html-use-svg
Keep original table width	When you set this property to true, if a column in a table is deleted, the original width of the table is maintained.	true	html-keep-original-table-width

Property Name	Description	Default	Configuration Name
Enable horizontal scrollbar automatically for html table	When you set this property to true, a horizontal scroll bar is added to a table that doesn't fit within the current size of the browser window.	false	html-enable-horiz-table-scroll
Enable html table column size auto adjust	When you set this property to true, the column widths in a table are automatically adjusted to the size of the browser window.	false	html-enable-table-col-size-auto-adjust
Set zero height for empty paragraph	When you set this property to true and the output is HTML, the height of an empty paragraph (that is, a paragraph without text) is set to zero points.	true	html-set-empty-paragraph-zero-height

## FO Processing Properties

The table below describes the properties that control FO processing.

Property Name	Description	Default	Configuration Name
Use BI Publisher's XSLT processor	<p>Controls the use of parser. If set to "false", uses the non packaged XDK parser. If set to "true", uses the 11g parser packaged in Publisher. If set to "12c", uses the 12c parser packaged in Publisher.</p> <p>You can set this property at the server level or at the report level.</p> <p>If the data size is more than 2GB, set to "12c".</p> <p>If you set this property to "12c" at report level, ensure that you set the <b>Set ACCESS_MODE to FORWARD_READ on XSLT processor property</b> to "false" at the server level and "true" at the report level.</p>	true	xslt-xdoparser
Enable scalable feature of XSLT processor	<p>Controls the scalable feature of the XDO parser. The property "Use BI Publisher's XSLT processor" must be set to "true" or "12c" for this property to be effective.</p> <p>The value of this property should be "true" at both server level and report level. If you set to "false", FO processor uses memory (heap) instead of disk, and might cause out-of-memory issues.</p>	false	xslt-scalable

Property Name	Description	Default	Configuration Name
Enable XSLT runtime optimization	When set to "true", the overall performance of the FO processor is increased and the size of the temporary FO files generated in the temp directory is significantly decreased. Note that for small reports (for example 1-2 pages) the increase in performance isn't as marked. To further enhance performance when you set this property to true, set the <b>Extract attribute sets</b> property to "false".	true	xslt-runtime-optimization
Enable XPath Optimization	When set to "true", the XML data file is analyzed for element frequency. The information is then used to optimize XPath in XSL.	false	xslt-xpath-optimization
Pages cached during processing	This property is enabled only when you specify a Temporary Directory (under General properties). During table of contents generation, the FO Processor caches the pages until the number of pages exceeds the value specified for this property. It then writes the pages to a file in the Temporary Directory.	50	system-cache-page-size
Bidi language digit substitution type	Valid values are "None" and "National". When set to "None", Eastern European numbers are used. When set to "National", Hindi format (Arabic-Indic digits) is used. This setting is effective only when the locale is Arabic, otherwise it's ignored.	National	digit-substitution
Disable variable header support	When set to true, prevents variable header support. Variable header support automatically extends the size of the header to accommodate the contents.	false	fo-prevent-variable-header
Disable external references	When set to true, disallows importing of secondary files such as subtemplates or other XML documents during XSL processing and XML parsing. This increases the security of the system. Set this to "false" if the report or template calls external files.	true	xdk-secure-io-mode



Property Name	Description	Default	Configuration Name
FO Parsing Buffer Size	Specifies the size of the buffer for the FO Processor. When the buffer is full, the elements from the buffer are rendered in the report. Reports with large tables or pivot tables that require complex formatting and calculations may require a larger buffer to properly render those objects in the report. Increase the size of the buffer at the report level for these reports. Note that increasing this value affects the memory consumption of the system.	1000000	fo-chunk-size
FO extended linebreaking	When set to true, punctuation, hyphenation, and international text are handled properly when line breaking is necessary.	true	fo-extended-linebreaking
Enable XSLT runtime optimization for sub-template	Provides an option to perform XSL import in FOProcessor before passing only one XSL to XDK for further processing. This allows xslt-optimization to be applied to the entire main XSL template which already includes all its subtemplates.  The default is true. If you call the FOProcessor directly, the default is false.	true	xslt-do-import
Report Timezone	Valid values: User or JVM.  When set to User, Publisher uses the User-level Report Time Zone setting for reports. The User Report Time Zone is set in the user's Account Settings.  When set to JVM, Publisher uses the server JVM timezone setting for all users' reports. All reports therefore display the same time regardless of individual user settings. This setting can be overridden at the report level.	User	fo-report-timezone
Set ACCESS_MODE to FORWARD_READ on XSLT processor	If you set the <b>Use BI Publisher's XSLT processor</b> property to "12c" at report level, ensure that the <b>Set ACCESS_MODE to FORWARD_READ on XSLT processor</b> property is set to "false" at the server level and "true" at the report level.	false	xslt-forward-read
PDF Bidi Unicode Version	Specifies the Unicode version (3.0 or 4.1) used to display the BIDI strings in the PDF output.	4.1	pdf-bidi-unicode-version

## RTF Template Properties

You configure RTF templates with various settings.

The properties described in the following table can be set to govern RTF templates.

Property Name	Description	Default
Extract attribute sets	The RTF processor automatically extracts attribute sets within the generated XSL-FO. The extracted sets are placed in an extra FO block, which can be referenced. This improves processing performance and reduces file size. Valid values are: <ul style="list-style-type: none"><li>• Enable - extract attribute sets for all templates and subtemplates</li><li>• Auto - extract attribute sets for templates, but not subtemplates</li><li>• Disable - do not extract attribute sets</li></ul>	Auto
Enable XPath rewriting	When converting an RTF template to XSL-FO, the RTF processor automatically rewrites the XML tag names to represent the full XPath notations. Set this property to "false" to disable this feature.	true
Characters used for checkbox	The default PDF output font doesn't include a glyph to represent a checkbox. If the template contains a checkbox, use this property to define a Unicode font for the representation of checkboxes in the PDF output. You must define the Unicode font number for the "checked" state and the Unicode font number for the "unchecked" state using the following syntax: fontname;<unicode font number for true value's glyph>;<unicode font number for false value's glyph>  Example: Go Noto Current Jp;9745;9744 Note that the font that you specify must be made available at runtime.	Go Noto Current Jp;9745;9744
Barcode encoder	Select the barcode encoder for generating the barcodes in reports. Oracle recommends that you use the Libre encoder.	Libre

## XPT Template Properties

Configure XPT templates by setting the properties described in the table below.

Property Name	Description	Default
XPT Scalable Mode for Offline Reports	<p>When you set this property to true, the scheduled reports that use the XPT template and include a large amount of data run without memory issues. The first 100,000 rows of data in the report are stored in memory and the remaining rows are stored in the file system.</p> <p>When you set this property to false, the scheduled reports that use XPT template are processed in-memory. Set this property to false for reports that contain less data.</p>	False
XPT Scalable Mode for Online Static Output	<p>When you set this property to true, the online reports that use the XPT template and include a large amount of data run without memory issues. The first 100,000 rows of data in the report are stored in memory and the remaining rows are stored in the file system.</p> <p>When you set this property to false, the online reports that use XPT template are processed in-memory. Set this property to false for reports that contain less data.</p>	False
Enable Asynchronous Mode for Interactive Output	<p>When you set this property to true, interactive reports that use the XPT template make asynchronous calls to Oracle WebLogic Server.</p> <p>When you set this property to false, interactive reports that use the XPT template make synchronous calls to Oracle WebLogic Server. Oracle WebLogic Server limits the number of synchronous calls. Any calls that are stuck expire in 600 seconds.</p>	True

## PDF Template Properties

The properties described in the table below can be set to govern PDF templates.

Property Name	Description	Default	Internal Name
Remove PDF fields from output	<p>Specify "true" to remove PDF fields from the output. When PDF fields are removed, data entered in the fields cannot be extracted.</p> <p>For repeating fields, the value of this property is set to true by default and cannot be changed to false.</p> <p>See <a href="#">Set Fields as Updatable or Read Only</a>.</p>	false	remove-pdf-fields

Property Name	Description	Default	Internal Name
Set all fields as read only in output	By default, Publisher sets all fields in the output PDF of a PDF template to be read only. If you want to set all fields to be updatable, set this property to "false".  For more information, see <a href="#">Set Fields as Updatable or Read Only</a> .	true	all-field-readonly
Maintain each field's read only setting	Set this property to "true" if you want to maintain the "Read Only" setting of each field as defined in the PDF template. This property overrides the settings of "Set all fields as read only in output."  For more information, see <a href="#">Set Fields as Updatable or Read Only</a> .	false	all-fields-readonly-asis

## Excel Template Properties

Configure Excel templates by setting the properties described in the table below.

Property Name	Description	Default
Enable Scalable Mode	When set to true, large reports that use Excel template run without out of memory issues. Data overflows automatically into multiple sheets if a group of data in a sheet exceeds 65000 rows. This overcomes the Microsoft Excel limitation of 65000 rows per sheet.  When set to false, large reports that use Excel template can cause out of memory issues.	false

## CSV Output Properties

Use the properties described in this table to control comma-separated value output.

Property Name	Description	Default
CSV delimiter	Specifies the character used to delimit the data in comma-separated value output. Other options are: Semicolon (;), Tab (\t) and Pipe ( ).	,
Remove leading and trailing white space	Specify "True" to remove leading and trailing white space between data elements and the delimiter.	false

## Excel Output Properties

You can set specific properties to control Excel output.

Property Name	Description	Default
Show grid lines	Set to true to show the Excel table grid lines in the report output.	false
Page break as a new sheet	Set to "True" if you want a page break specified in the report template to generate a new sheet in the Excel workbook.	true
Minimum column width	Set the column width in points. When the column width is less than the specified minimum and it contains no data, the column is merged with the preceding column. The valid range for this property is 0.5 to 20 points.	3 (in points, 0.04 inch)
Minimum row height	Set the row height in points. When the row height is less than the specified minimum and it contains no data, the row is removed. The valid range for this property is 0.001 to 5 points.	1 (in points, 0.01 inch)
Keep values in same column	Set this property to True to minimize column merging. Column width is set based on column contents using the values supplied in the Table Auto Layout property. Output may not appear as neatly laid out as when using the original layout algorithm.	False
Table Auto Layout	<p>Specify a conversion ratio in points and a maximum length in points, for example 6.5,150. See example.</p> <p>For this property to take effect, the property "Keep values in same column" must be set to True.</p> <p>This property expands the table column width to fit the contents. The column width is expanded based on the character count and conversion ratio up to the maximum specification.</p> <p>Example: Assume a report with two columns of Excel data -- Column 1 contains a text string that's 18 characters and Column 2 is 30 characters long. When the value of this property is set to 6.5,150, the following calculations are performed:</p> <p>Column 1 is 18 characters:</p> <p>Apply the calculation: <math>18 * 6.5\text{pts} = 117\text{ pts}</math></p> <p>The column in the Excel output will be 117 pts wide.</p> <p>Column 2 is 30 characters:</p> <p>Apply the calculation: <math>30 * 6.5\text{ pts} = 195\text{ pts}</math></p> <p>Because 195 pts is greater than the specified maximum of 150, Column 2 will be 150 pts wide in the Excel output.</p>	N/A

Property Name	Description	Default
Maximum allowable nested table row count	Specify the maximum allowable row count for a nested table. Allowed values are 15000 to 999,999.  During report processing, nested inner table rows cannot be flushed to the XLSX writer, therefore they stay in-memory, increasing memory consumption. Set this limit to avoid out-of-memory exceptions. When this limit is reached for the size of the inner table, generation is terminated. The incomplete XLSX output file is returned.	20,000
Open password	Use this property to specify the password that report users must provide to open any XLSX output file.  Configuration name: xlsx-open-password	NA
Enable row split	Set to "true" to avoid stretching a row to a large height, and allow the row to be split into multiple rows.	True

## EText Output Properties

The table below describes the properties that control EText output files.

Property Name	Description	Default
Add UTF-8 BOM Signature	When set to true, the Etext output is in UTF-8 Unicode with BOM format.	false
Enable bigdecimal	When set to true, you enable high-precision numeric calculation of the Etext output.	false

## All Outputs Properties

The properties in the table below apply to all outputs.

Property Name	Description	Default
Use 11.1.1.5 compatibility mode	Reserved. Don't update unless instructed by Oracle.	False
Ignore case for catalog object path	Specifies whether to ignore the case of the catalog object path while locating a catalog object.	False
Allow fallback to seeded report	Specifies whether to fallback on or to skip execution of the corresponding seeded report (pre-defined report) when you don't have permission to run the custom report. When set to true and the user doesn't have permission to run the custom report, the corresponding seeded report executes. When set to false, you get an error when the custom report execution fails.	True

Property Name	Description	Default
Webservice optimization	When set to true, Publisher caches the report definition and avoids multiple requests to the catalog when the same report runs multiple times within a short interval of time. Caching helps to improve the system performance.	True

## Define Font Mappings

Map base fonts in RTF or PDF templates to the target fonts to be used in the published document. Font mapping is performed only for PDF output and PowerPoint output.

There're two types of font mappings:

- RTF Templates - for mapping fonts from RTF templates and XSL-FO templates to PDF and PowerPoint output fonts
- PDF Templates - for mapping fonts from PDF templates to different PDF output fonts.

## Make Fonts Available to Publisher

Publisher provides a set of Type1 fonts and a set of TrueType fonts.

You can select any of the predefined fonts as a target font with no additional setup required.

The predefined fonts are located in `<oracle_home>/oracle_common/internal/` fonts. If you want to map to another font, then you must place the font in this directory to make it available to Publisher at runtime. If the environment is clustered, then you must place the font on every server.

## Set Font Mapping at the Site Level or Report Level

A font mapping can be defined at the site level or the report level.

Use the following settings to set the font mapping:

- To set a mapping at the site level, select the **Font Mappings** link from the Admin page.
- To set a mapping at the report level, select the **Configuration** link for the report, then select the Font Mappings tab. These settings apply to the selected report only.

The report-level settings take precedence over the site-level settings.

## Create a Font Mapping

From the Administration page,

1. In the Administration page, under **Runtime Configuration**, select **Font Mappings**.
2. Under RTF Templates or PDF Templates, select **Add Font Mapping**.
3. Enter the following on the Add Font Mapping page:
  - Base Font - enter the font family that is mapped to a new font. Example: Arial
  - Select the **Style**: Normal or Italic (Not applicable to PDF Template font mappings)
  - Select the **Weight**: Normal or Bold (Not applicable to PDF Template font mappings)

- Select the **Target Font Type**: Type 1 or TrueType
- Enter the Target Font

If you selected TrueType, then you can enter a specific numbered font in the collection. Enter the TrueType Collection (TTC) Number of the desired font.

## Predefined Fonts

The following Type1 fonts are built-in to Adobe Acrobat and by default the mappings for these fonts are available for publishing.

You can select any of these fonts as a target font with no additional setup required.

The Type1 fonts are listed in the table below.

Font Family	Style	Weight	Font Name
serif	normal	normal	Time-Roman
serif	normal	bold	Times-Bold
serif	italic	normal	Times-Italic
serif	italic	bold	Times-BoldItalic
sans-serif	normal	normal	Helvetica
sans-serif	normal	bold	Helvetica-Bold
sans-serif	italic	normal	Helvetica-Oblique
sans-serif	italic	bold	Helvetica-BoldOblique
monospace	normal	normal	Courier
monospace	normal	bold	Courier-Bold
monospace	italic	normal	Courier-Oblique
monospace	italic	bold	Courier-BoldOblique
Courier	normal	normal	Courier
Courier	normal	bold	Courier-Bold
Courier	italic	normal	Courier-Oblique
Courier	italic	bold	Courier-BoldOblique
Helvetica	normal	normal	Helvetica
Helvetica	normal	bold	Helvetica-Bold
Helvetica	italic	normal	Helvetica-Oblique
Helvetica	italic	bold	Helvetica-BoldOblique
Times	normal	normal	Times
Times	normal	bold	Times-Bold
Times	italic	normal	Times-Italic
Times	italic	bold	Times-BoldItalic
Symbol	normal	normal	Symbol
ZapfDingbats	normal	normal	ZapfDingbats

The TrueType fonts are listed in the table below. All TrueType fonts are subset and embedded into PDF.



Font Family Name	Style	Weight	Actual Font	Actual Font Type
Go Noto Current Jp	normal	normal	GoNotoCurrentJp.ttf	TrueType (Japanese flavor)
Go Noto Current Kr	normal	normal	GoNotoCurrentKr.ttf	TrueType (Korean flavor)
Go Noto Current Sc	normal	normal	GoNotoCurrentSc.ttf	TrueType (Simplified Chinese flavor)
Go Noto Current Tc	normal	normal	GoNotoCurrentTc.ttf	TrueType (Traditional Chinese flavor)

## Included Barcode Fonts

The table lists the barcode fonts included in Publisher.

Font File	Supported Algorithm
LibreBarcode128-Regular.TTF	code128a, code128b, and code 128c code128auto to automatically switch between the three code128 algorithms
LibreBarcode39-Regular.TTF	code39, code39mod43
LibreBarcodeEAN13Text-Regular.TTF	upca, upce

## Barcode Font Mapping

Use Libre barcode fonts instead of Monotype barcode fonts in your reports.

Libre supports the same set of barcodes as Monotype (Code 128, Code 39, and UPC), but Libre uses an encoding scheme different from the encoding scheme Monotype uses.

Barcode Type	Default Barcode Font Name	Monotype Font	Libre Font
Code 128	Default Code 128	128R00.TTF	LibreBarcode128-Regular.ttf
Code 39	Default BC 3of9	B39R00.TTF	LibreBarcode39-Regular.ttf
UPC	Default UPC-EAN	UPCR00.TTF	LibreBarcodeEAN13Text-Regular.ttf

### What changes when you use the Libre barcode fonts instead of the Monotype barcode fonts to generate barcodes?

The barcode output generated might be smaller in size. If the scanner can't read the barcode, edit the template to increase the barcode field font size, and then test again with your scanner.

# Part III

## Create Style Templates and Subtemplates

This part describes how to create and implement style templates and subtemplates.

### Topics:

- [Create and Implement Style Templates](#)
- [Understand Subtemplates](#)
- [Design RTF Subtemplates](#)
- [Design XSL Subtemplates](#)

# Create and Implement Style Templates

This topic describes how to create and implement style templates. A style template is an RTF template that contains style information that can be applied to other RTF layouts to achieve a consistent look and feel across your enterprise reports.

## Topics:

- [Understand Style Templates](#)
- [Create a Style Template RTF File](#)
- [Upload a Style Template File to the Catalog](#)
- [Assign a Style Template to a Report Layout](#)
- [Update a Style Template](#)
- [Add Translations to a Style Template Definition](#)

## Understand Style Templates

A style template is an RTF template that contains style information that can be applied to RTF layouts.

The style information in the style template is applied to RTF layouts at runtime to achieve a consistent look and feel across your enterprise reports. You associate a style template to a report layout in the report definition. Using a style template has the following benefits:

- Enables the same look and feel across your enterprise reports
- Enables same header and footer content, such as company logos, headings, and page numbering
- Simplifies changing the elements and styles across all reports

## About Styles Defined in the Style Template

Use style template to define paragraph and heading styles, table styles, and header and footer content.

The styles of the following elements can be defined in the style template:

- Paragraph and Heading Styles

You can create a paragraph style in a style template. When this same named style is used in a report layout, the report layout inherits the following from the style template definition: font family, font size, font weight (normal, bold), font style (normal, italic), font color, and text decoration (underline, overline, or strike through).
- Table Styles

Following are some of the style elements inherited from the table style definition: font style, border style, gridline definition, shading, and text alignment.
- Header and Footer Content

The header and footer regions of the style template are applied to the report layout. This includes images, dates, page numbers, and any other text-based content. If the report layout also includes header and footer content, then it's overwritten.

## Style Template Process

Following this process for creating style templates helps ensure consistency across documents.

### Design Time

For the Style Template:

1. Open Microsoft Word.
2. Define named styles for paragraphs, tables, headings, and static header and footer content. This is the style template.
3. Save this document as a .rtf file.
4. To ensure that you do not lose custom styles in Microsoft Word, also save the document as a Word Template file (.dot) or save the styles to the Normal.dot file. This file can be shared with other report designers.
5. Upload the RTF style template file to the catalog.

For the layout template using the style template:

1. In the RTF template, use the same named styles for paragraph and table elements that you want to be inherited from the style template.
2. Open the report in BI Publisher's Report Editor and select the style template to associate to the report. Then enable the style template for the specific report layout.

### Runtime

When you run the report with the selected layout, Publisher applies the styles, header, and footer from the style template.

## Create a Style Template RTF File

These sections describe how to define the style types in the Microsoft Word document.

For more complete information see the Microsoft Word documentation.

## Define Styles for Paragraphs and Headings

Use a paragraph style to define formatting such as font type, size, color, text positioning and spacing. A paragraph style can be applied to one or more paragraphs. Use a paragraph style to format headings and titles in the report as well.

To define a paragraph style type:

1. In the Microsoft Word document, from the **Format** menu, select **Styles and Formatting**.
2. From the Styles and Formatting task pane, select **New Style**.
3. In the New Style dialog, enter a name for the style. Select style type: **Paragraph**. Format the style using the options presented in the dialog. To see additional paragraph options (such as font color and text effects), click **Format**.

4. When finished, click **OK** and the new style is displayed in the list of available formats in the Styles and Formatting task pane.
5. Select the new style and make an entry in the style template to display the style.

To apply the paragraph style type in the document:

1. Position the cursor within the paragraph (or text) to which you want to apply the style.
2. Select the style from the list of available formats in the Styles and Formatting task pane. The style is applied to the paragraph.

To modify an existing style type:

1. In the Microsoft Word document, from the **Format** menu, select **Styles and Formatting**.
2. From the Styles and Formatting task pane, select and right-click the style to modify.
3. From the menu, select **Modify**.

To apply heading styles in the document:

1. Position the cursor on the text to which you want to apply the heading style.
2. Select the heading style from the list of available formats in the Styles and Formatting task pane. The selected heading styles are applied to the report output. For example, in the HTML report, Heading 1 through Heading 6 styles use H1, H2, H3, H4, H5, and H6 tags respectively.

## Define Styles for Tables

Follow these steps to define styles for tables.

To define a table style type:

1. In the Microsoft Word document, from the **Format** menu, select **Styles and Formatting**.
2. From the Styles and Formatting task pane, select **New Style**.
3. In the New Style dialog, enter a name for the style. Choose style type: **Table**. Format the style using the options presented in the dialog. To see additional table options (such as Table Properties and Borders and Shading), click **Format**.
4. When finished, click **OK** and the new style is displayed in the list of available formats in the Styles and Formatting task pane.
5. Choose the new style and make an entry in the style template to display the style.

To apply the table style type in the document:

1. Position the cursor within the table to which you want to apply the style.
2. Select the table style from list of available formats in the Styles and Formatting task pane. The style is applied to the table.

## Define a Header and Footer

You can define a header and footer in the style template. The contents and sizing of the header and footer in the style template are applied to the report layouts.

If a header and footer have been defined in the report layout, then they're overwritten. The header and footer from the style template are applied.

To define a header and footer:

1. In the Microsoft Word document, from the **View** menu, select **Header and Footer**.

2. Enter header and footer content. This can include a logo or image file, static text, current date and time stamps, page numbers, or other content supported by Microsoft Word.

## Upload a Style Template File to the Catalog

You can place a style template in any folder in the catalog to which you have access.

Your organization might have a designated folder for style templates.

1. On the global header click **New**, and then click **Style Template**.  
This launches an untitled Style Template properties page.
2. From the **Templates** region, click the **Upload** toolbar button.
3. In the Upload Template File dialog, click **Browse** to select the Template File. Select **rtf** as the **Type**, and select the appropriate **Locale**.
4. Click **Save**.
5. In the Save As dialog choose the catalog folder in which to save the style template. Enter the **Name** and click **Save**.

You can upload one RTF file per locale to a Style Template definition. If you upload additional template files to this Style Template, each file is automatically named as the locale regardless of the name that you give the file before upload.

6. If you are uploading multiple localized files, then select the file to be used as the default.

## Assign a Style Template to a Report Layout

Follow these steps to assign a style template to a report layout.

1. Navigate to the report in the catalog and click **Edit** to open the report editor.
2. From the default thumbnail view, select **View a List**. In the Layout region, click the **Choose** icon to search for and select the style template from the Publisher catalog.
3. For the layout templates that you want to use the style template, select the **Apply Style Template** box for the template. Note that the box is only enabled for RTF templates.

The following figure highlights the actions required to enable a style template in the Report Editor.

The screenshot shows the 'Company Sales Report' editor. In the 'Layout' region, there is a search bar with the text 'Apply Style Template /Sample Lite/Published Reporting/Style Templates/Or'. Below it is a table with the following columns: Name, Template File, Type, Output Formats, Default Format, Default Layout, Apply Style Template, Active, View Online, and Locale. The 'Product Sales Details' row is highlighted, and its 'Apply Style Template' checkbox is checked and highlighted with a red box.

Name	Template File	Type	Output Formats	Default Format	Default Layout	Apply Style Template	Active	View Online	Locale
Sales by Company Org.	Company Sales.xpt	xpt	Interactive;HTML;P	Interactive	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	English (United States)
Sales by Office	Office Sales.xpt	xpt	Interactive;HTML;P	Interactive	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	English (United States)
Product Sales Details	Product Sales.rtf	rtf	HTML;PDF;RTF;Ex	PDF	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	English (United States)

## Update a Style Template

You can alter a style template after it has been saved.

To update or edit a saved style template:

1. Navigate to the file in the catalog.
2. Click **Edit** to open the Style Template properties page.
3. Delete the existing file.
4. Upload the edited file, choosing the same locale.

## Add Translations to a Style Template Definition

Style templates offer the same support for translations as RTF template files.

You can upload multiple translated RTF files under a single Style Template definition and assign the appropriate locale.



Or you can generate an XLIFF (.xlf) file of the translatable strings, translate the strings, and upload the translated file. These are displayed in the **Translations** region, as shown in the following figure:

### Oracle Styles Template - Style Template

**Description** Example of a BI Publisher Style Template with a header & footer

**▲ Templates**

Click the Upload icon to upload a template file. Only one template file can be uploaded for each locale.






	Default	Locale
	<input checked="" type="checkbox"/>	English (United States)
	<input type="checkbox"/>	Greek (Greece)

**▲ Translations**

Click Extract Translation to generate an XLIFF file type from the selected Base Template file.

Base Template English (United States) ▼ **Extract Translation**

	Locale
	French (France)
	German (Germany)

At runtime, the appropriate style template is applied based on the user's account **Preference** setting for Report Locale for reports viewed online; or, for scheduled reports, based on the user's selection for Report Locale for the scheduled report.

The XLIFF files for style templates can be generated individually, then translated, and uploaded individually. Or, if you perform a catalog translation that includes the style template folders, the strings from the style template files are extracted and included in the larger catalog translation file. When the catalog translation file is uploaded to Publisher, the appropriate translations from the catalog file are displayed in the **Translations** region of the Style Template definition.

For more information on translations, see [Translation Support Overview and Concepts](#).



# Understand Subtemplates

This topic describes concepts for using subtemplates. A subtemplate is a piece of formatting functionality that can be defined once and used multiple times within a single layout template or across multiple layout template files.

## Topics:

- [What is a Subtemplate?](#)
- [Supported Locations for Subtemplates](#)
- [Test Subtemplates from the Desktop](#)
- [Upload a Subtemplate](#)
- [Call a Subtemplate from an External Source](#)

For information on designing an RTF subtemplate, see [Design RTF Subtemplates](#). For information on designing an XSL subtemplate, see [Design XSL Subtemplates](#).

## What is a Subtemplate?

A subtemplate is a piece of formatting functionality that can be defined once and used multiple times within a single layout template or across multiple layout template files.

This piece of formatting can be in an RTF file format or an XSL file format. RTF subtemplates are easy to design as you can use Microsoft Word native features. XSL subtemplates can be used for complex layout and data requirements.

Some common uses for subtemplates include:

- Reusing a common layout or component (such as a header, footer, or address block)
- Handling parameterized layouts
- Handling dynamic or conditional layouts
- Handling lengthy calculations or reusing formulae

## About RTF Subtemplates

An RTF subtemplate is an RTF file that consists of one or more `<?template:?>` definitions, each containing a block of formatting or commands.

This RTF file, when uploaded to Publisher as a subtemplate object in the Catalog, can be called from within another RTF Template.

## About XSL Subtemplates

An XSL subtemplate is an XSL file that contains formatting or processing commands in XSL for the Publisher formatting engine to execute. Use an XSL template to include complex calculations or formatting instructions not supported by the RTF standard.

This XSL file, when uploaded to Publisher as a Subtemplate object in the **Catalog**, can be called from within an RTF Template.

## Supported Locations for Subtemplates

It's recommended that you upload subtemplates to the Publisher catalog.

The catalog is the most secure location.

For compatibility with older versions of Publisher, you can also call a subtemplate that resides in a file on the local server, or on a different server (that can be accessed by HTTP protocol). Using one of these methods requires specific import syntax and server settings to allow the communication.

## Test Subtemplates from the Desktop

If you have the Template Builder installed, you can preview the template and subtemplate combination before uploading them to the catalog.

To test from your local environment, you must alter the import template syntax to enable the processor to locate the subtemplate file on a local directory. To test, enter the import template syntax as follows:

```
<?import:file:{local_template_path}?>
```

For example:

```
<?import:file:C:///Template_Directory/subtemplate_file.rtf?>
```

or for an XSL subtemplate file:

```
<?import:file:C:///Template_Directory/subtemplate_file.xsl?>
```

You can then select the **Preview** option in the Template Builder and the processor can locate the subtemplate and render it from your local environment.

Note that before you upload the primary template to the catalog, you must change the import syntax to point to the appropriate location in the catalog.

## Upload a Subtemplate

You can upload one or more sub templates for use with Publisher.

To upload a subtemplate file:

1. On the global header click **New** and then click **Sub Template**. This launches an untitled Sub Template page.
2. In the **Templates** region, click **Upload**.
3. In the Upload Template File dialog, select the subtemplate file for upload.
  - **Type**: Select rtf for RTF subtemplate files or xsl for XSL subtemplate files.
  - **Locale**: Select the appropriate locale for the subtemplate file.

4. Click **Upload**.

The subtemplate file is displayed in the **Templates** region as the locale name that you selected (for example: English).

5. Click **Save**. In the Save As dialog choose the catalog folder in which to save the Sub Template. Enter the **Name** and click **Save**.

6. (RTF Sub Templates only) If you are uploading multiple localized files, then select the file that is to be used as the default. For more information on localization of template files, see [Add Translations to an RTF Subtemplate](#).

You may upload only one RTF file per locale to a Sub Template definition. If you upload additional template files to this Sub Template, each file is automatically named as the locale regardless of the name that you give the file before upload.

Translations are not supported for XSL Sub Templates.

Note that the Sub Template object is saved with the extension ".xsb". You use the Name that you choose here with the .xsb extension when you import the Sub Template object (for example: MySubtemplate.xsb).

## Call a Subtemplate from an External Source

You can call a subtemplate that resides outside the catalog.

These instructions are provided for backward compatibility only. It's recommended that you place subtemplates in the catalog.

Note that localization isn't supported for subtemplates that are maintained outside the catalog.

## Import a Subtemplate Outside the Catalog over HTTP or FTP

Use a standard protocol, such as http or ftp and enter the import statement as shown here.

```
<?import:http://myhost:8080/subtemplate.rtf?>
```

## Import Subtemplates Outside the Catalog on the Same Server

If the subtemplate is located on the server, but not in the Publisher catalog, then enter this.

```
<?import:file://{template_path}?>
```

where

*template\_path* is the path to the subtemplate file on the server

For example:

```
<?import:file://c:/Folder/mySubtemplate.rtf?>
```

## Required Settings To Run Sub Templates Stored Outside the Catalog

To run sub templates outside the catalog you must configure the disable external references property.

Using sub templates requires the following FO processing configuration property setting for the report:

Disable external references: Must be set to False

## Design RTF Subtemplates

This topic describes how to use RTF subtemplates to create and reuse functionality across multiple reports.

### Topics:

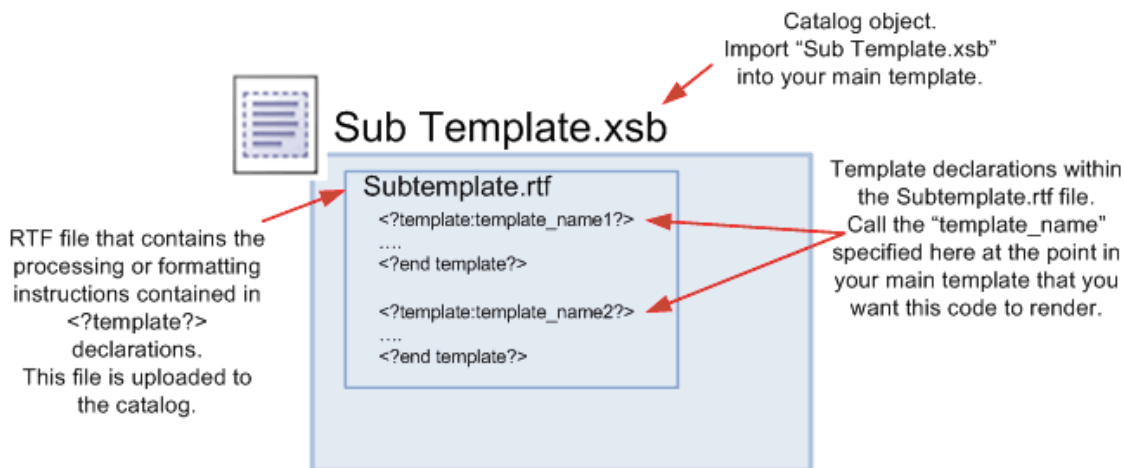
- [Understand RTF Subtemplates](#)
- [Process Overview for Creating and Implementing RTF Sub Templates](#)
- [Create an RTF Subtemplate File](#)
- [Call a Subtemplate from a Main Template](#)
- [When to Use RTF Subtemplates](#)
- [Add Translations to an RTF Subtemplate](#)

## Understand RTF Subtemplates

An RTF subtemplate is an RTF file that consists of one or more `<?template:?>` definitions, each containing a block of formatting or commands.

This RTF file, when uploaded to Publisher as a Sub Template object in the Catalog, can be called from other RTF templates.

The following graphic illustrates the composition of an RTF Sub Template.



## Process Overview for Creating and Implementing RTF Sub Templates

You must follow this process to work with RTF sub templates.

Using a sub template consists of the following steps (described in the following sections):

1. Create the RTF file that contains the common components or processing instructions that you want to include in other templates.
2. Create the calling or "main" layout and include the following two commands:
  - import - to import the sub template file to the main layout template.
  - call-template - to execute or render the sub template contents in the main layout.
3. Test the template and sub template.

✓ **Tip**

You can use the Publisher Desktop Template Viewer to test the main layout plus sub template before loading them to the catalog. To do so, you must alter the import template syntax to point to the location of the sub template in the local environment. See [Test Subtemplates from the Desktop](#).

4. Upload the main template to the report definition and create the Sub Template object in the catalog. See [Upload a Subtemplate](#).

## Create an RTF Subtemplate File

You can create an RTF subtemplate file.

To create an RTF subtemplate file:

1. Enter the components or instructions in an RTF file.
2. Define the instructions as a subtemplate by enclosing the contents in the tags as shown below.

```
<?template:template_name?>
    ..subtemplate contents...
<?end template?>
```

where `template_name` is the name you choose for the subtemplate. In a single RTF file, you can have multiple entries, to mark different subtemplates or segments to include in other files.

```
<?template:template_name?>
<?end template?>
```

For example, the following figure shows a sample RTF file that contains two subtemplates, one named `commonHeader` and one named `commonFooter`.

<?template:commonHeader?>		
ORACLE®		Report Date: 17 August 2009
<?end template?>		
<?template:commonFooter?>		
Oracle Corporation 600 Oracle Parkway Redwood Shores CA 94065		Page 1 of 1
<?end template?>		

## Call a Subtemplate from a Main Template

There're two entries that you must make to call a subtemplate from a main template.

To implement the subtemplate in a main template, you must make two entries in the main template:

First, import the subtemplate file to the main template. The import syntax tells the Publisher engine where to find the Sub Template in the catalog.

Second, enter a call command to render the contents of the subtemplate at the position desired.

### Import the Subtemplate to the Main Template

Enter the import command anywhere in the main template prior to the call template command.

If you do not require a locale, enter the following:

```
<?import:xdoxsl:///path to subtemplate.xsb?>
```

where

*path to subtemplate.xsb* is the path to the subtemplate .xsb object in the catalog.

For example:

```
<?import:xdoxsl:///Executive/HR_Reports/mySubtemplate.xsb?>
```

If the subtemplate resides in a personal folder under My Folders, the command to import the subtemplate is:

```
<?import:xdoxsl:///~username/path to subtemplate.xsb?>
```

where *username* is your user name.

For example, if user *myuser* uploads a subtemplate called Template1 to a folder called Subtemplates under My Folders, the correct import statement is:

```
<?import:xdoxsl:///~myuser/Subtemplates/Template1.xsb?>
```

## Call the Subtemplate to Render Its Contents

You can also enter a call command to render the contents of the subtemplate at the position that you desire.

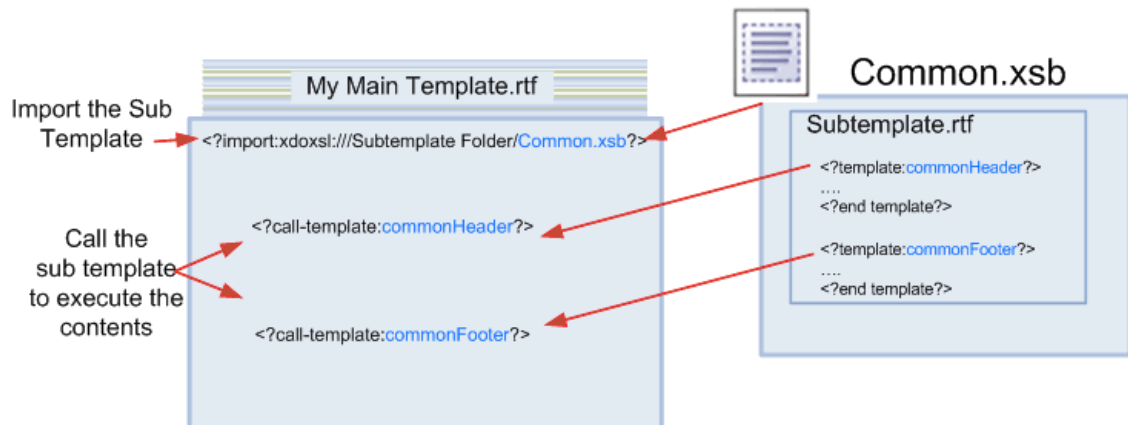
- In the position in the main template where you want the subtemplate to render, enter the call-template command, as follows:

```
<?call-template:template_name?>
```

where

*template\_name* is the name you assigned to the contents in the template declaration statement within the subtemplate file (that is, the `<?template:template_name?>` statement).

The following figure illustrates the entries required in a main template:



## Import a Localized Subtemplate

To designate the locale of the imported subtemplate, append the locale to the import statement as shown here.

```
<?import:xdoxsl:///path to subtemplate.xsb?loc={locale_name}?>
```

where

*path to subtemplate.xsb* is the path to the subtemplate .xsb object in the catalog

and

*locale\_name* is the language-territory combination which comprises the locale. The locale designation is optional.



For example:

```
<?import:xdoxsl:///Executive/HR_Reports/mySubtemplate.xsb?loc=en-US?>
```

Note that you can also use `$_XDOLOCALE` to import a localized subtemplate based on the runtime user locale. For example:

```
<?import:xdoxsl:///Executive/HR_Reports/mySubtemplate.xsb?loc=$_XDOLOCALE?>
```

## Example

In this example, your company address is a fixed string that is displayed in all your templates. Rather than reproduce the string in all the templates, you can place it in one subtemplate and reference it from all the others.

To place the string in a subtemplate and reference it:

1. In an RTF file enter the following template declaration:

```
<?template:MyAddress?>  
My Company  
500 Main Street  
Any City, CA 98765  
<?end template?>
```

2. Create a Sub Template in the catalog in the following location: Customer Reports/Templates.
3. Upload this file to the Sub Template and save it as "Common Components" (Publisher assigns the object the .xsb extension).
4. In the main template, enter the following import statement in a form field or directly in the template:

```
<?import:xdoxsl:///Customer Reports/Templates/Common Components.xsb?>
```

5. In the main template, in the location you want the address to appear, enter:

```
<?call-template:MyAddress?>
```

At runtime the contents of the MyAddress subtemplate are fetched and rendered in the layout of the main template.

This functionality isn't limited to just strings, you can insert any valid RTF template functionality in a subtemplate, and even pass parameters from one to the other. For examples, see [When to Use RTF Subtemplates](#).

## When to Use RTF Subtemplates

RTF subtemplates can be used in various scenarios.

Following are several common use-cases for RTF subtemplates.

### Reuse a Common Layout

Frequently multiple reports require the same header and footer content.

By using an RTF subtemplate to contain this content, any global changes are simplified and require updating only the subtemplate instead of each individual layout.

## Conditionally Display a Layout Based on a Value in the Data

Subtemplates can also be used to apply conditional layouts based on a value in the report data.

By using the RTF template "choose" command, you can instruct Publisher to apply a different `<?template?>` defined in the subtemplate file.

You cannot conditionalize the import statement for the subtemplate file. Instead, you import one subtemplate file and conditionalize the call statement. You define the multiple `<?template?>` options in the single subtemplate file.

### Example

Assume you have a report that is sent to customers in India and the United States. You must apply a different address layout depending on the country code (COUNTRY\_CODE) supplied in the data. This example uses the RTF templates if statement functionality to call the subtemplate with the appropriate address format.

The subtemplate file may look as follows:

```
<?template:US_Address?>
  <?US_Address_Field1?>
  <?US_Address_Field2?>
  <?US_Address_Field3?>
<?end template?>

<?template:IN_Address?>
  <?IN_Address_Field1?>
  <?IN_Address_Field2?>
  <?IN_Address_Field3?>
<?end template?>
```

To call the sub template with the appropriate address format:

1. Create a Sub Template in the catalog in the following location:  
Customers/Invoice Reports  
Upload the RTF file and save the Sub Template as Addresses.
2. In the main template enter the following to import the Sub Template:

```
<?import:xdoxsl:///Customers/Invoice Reports/Addresses.xsb?>
```

3. In the location where you want the address to display, enter the following:

```
<?if:COUNTRY_CODE='USA'?>
  <?call:US_Address?>
<?end if?>
<?if:COUNTRY_CODE='IN'?>
  <?call:IN_Address?>
<?end if?>
```

When the report is run, the address format is properly applied, depending on the value of COUNTRY\_CODE in the data.

## Conditionally Display a Layout Based on a Parameter Value

This example illustrates how to display a different layout based on a user parameter value or a selection from a list of values. The parameter can be passed to the RTF template and used to call a different `<?template?>` within the subtemplate file based on the value.

You cannot conditionalize the import statement for the subtemplate file.

### Example

Assume in the report data model that you've defined a parameter named DeptName. Set up this parameter as type Menu and associate it to a list of values, enabling your user to make a selection from the list when he views the report in the Report Viewer (or when he schedules the report).

In the RTF main layout template, enter the following command to capture the value chosen by the user:

```
<?param@begin:DeptName?>
```

To display the layout based on this user selection, you can use an IF statement or a CHOOSE statement to evaluate the parameter value and call the associated subtemplate.

Use the CHOOSE statement when there're many conditional tests and a default action is expected for the rest of the values. For example, the Accounting, Sales, and Marketing departments each require a different layout. All other departments can use a default layout.

To display the layout:

1. Create an RTF file and include the following template declarations:

```
<?template:tAccounting?>
- - - Specific Accounting Layout here - - -
<?end template?>

<?template:tSales?>
- - - Specific Sales Layout here - - -
<?end template?>

<?template:tMark?>
- - - Specific Marketing Layout here - - -
<?end template?>

<?template:tDefault?>
- - - Default Layout here - - -
<?end template?>
```

2. Create a Sub Template in the catalog in the following location:

Shared Folders/Executive/Department Expenses

Upload the RTF file and save the Sub Template as DeptSubtemps.

3. In the main RTF template, include the following commands:

```
<?import:xdoxsl:///Executive/Department Expenses/DeptSubtemps.xsb?loc=en-US?>

<?param@begin:DeptName?>

<?choose:?>
  <?when:$DeptName='Accounting'?>
    <?call:tAccounting?>
  <?end when?>
  <?when:$DeptName='Sales'?>
    <?call:tSales?>
  <?end when?>
  <?when:$DeptName='Marketing'?>
    <?call:tMark?>
  <?end when?>
  <?otherwise:$>
    <?call:tDefault?>
  <?end otherwise?>
<?end choose:?>
```

When the user runs the report, the layout applied is determined based on the value of DeptName. For more information on CHOOSE statements in RTF templates, see [Insert Choose Statements](#).

## Handle Simple Calculations or Repeating Formulae

Simple calculations can also be handled using an RTF subtemplate. More complex formulae should be handled with an XSL subtemplate.

### Example

This example illustrates setting up a subtemplate to contain a formula to calculate interest.

The subtemplate performs the interest calculation on the data in this report and passes the result back to the main template. The sub template accommodates the possibility that multiple reports that call this functionality might have different tag names for the components of the formula.

Assume that you've the following XML data:

```
<LOAN_DATA>
  <LOAN_AMOUNT>6000000</LOAN_AMOUNT>
  <INTEREST_RATE>.053</INTEREST_RATE>
  <NO_OF_YEARS>30</NO_OF_YEARS>
</LOAN_DATA>
```

To set up a sub template to contain a formula for calculating interest:

1. In an RTF file, create a template declaration called calcInterest. In this sub template define a parameter for each of the elements (principal, interest rate, and years) in the formula. Note that you must set the default value for each parameter.

```
<?template:calcInterest?>
  <?param:principal;0?>
```

```

<?param:intRate;0?>
<?param:years;0?>
<?number($principal) * number($intRate) * number($years)?>
<?end template?>

```

2. Create a Sub Template in the catalog in the following location:

Shared Folders/Subtemplates

Upload the RTF file and save the Sub Template as calculations.

3. In the main template, enter the following to import the sub template:

```

<?import:xdoxsl:///Subtemplates/calculations.xsb?>

```

4. In the location where you want the results of the calculation to display, enter the following in a Publisher field:

```

<?call@inlines:calcInterest?>
<?with-param:principal;/LOAN_AMOUNT?>
<?with-param:intRate;/INTEREST_RATE?>
<?with-param:years;/NO_OF_YEARS?>
<?end call?>

```

Note the use of the @inlines command here. This is optional. The @inlines command forces the results to be rendered inline at the location in the template where the call to the sub template is made. Use this feature, for example, if you want to keep the results on the same line as a string of text that precedes the call.

## Add Translations to an RTF Subtemplate

RTF subtemplates offer the same support for translations as RTF template files.

You can upload multiple translated RTF files under a single Subtemplate definition and assign the appropriate locale. These are displayed in the **Templates** region, as shown in the following figure.

Or you can generate an XLIFF (.xlf) file of the translatable strings, translate the strings, and upload the translated file. These are displayed in the **Translations** region.

At runtime, the appropriate subtemplate localization is applied based on the user's account **Preference** setting for Report Locale for reports viewed online; or, for scheduled reports, based on the user's selection for Report Locale for the scheduled report.

The XLIFF files for subtemplates can be generated individually, then translated, and uploaded individually. Or, if you perform a catalog translation that includes the Sub Template folders, the strings from the subtemplate files are extracted and included in the larger catalog translation file. When the catalog translation file is uploaded to Publisher, the appropriate translations from the catalog file are displayed in the **Translations** region of the Sub Template definition.

## Design XSL Subtemplates

This topic describes how to create XSL subtemplates to create reusable advanced functionality for your RTF templates.

### Topics:

- [Understand XSL Subtemplates](#)
- [Process Overview for Creating and Implementing XSL Sub Templates](#)
- [Create an XSL Subtemplate File](#)
- [Call an XSL Subtemplate from the Main Template](#)
- [Create the Sub Template Object in the Catalog](#)
- [Example Uses of XSL Subtemplates](#)

## Understand XSL Subtemplates

An XSL subtemplate is an XSL file that consists of one or more <xsl:template> definitions, each containing a block of formatting or processing commands.

When uploaded to Publisher as a Sub Template object in the Catalog, this XSL file can be called from other RTF templates to execute the formatting or processing commands.

XSL subtemplates can handle complex data and layout requirements. Use XSL subtemplates to transform the data structure for a section of a report (for example, for a chart) or to create a style sheet to manage a complex layout.

## Where to Put XSL Code in the RTF Main Template

When you call the XSL subtemplate within a main RTF subtemplate, you use XSL commands.

You must put this code inside a Publisher field (or Microsoft Word form field). You cannot enter XSL code directly in the body of the RTF template.

For more information on inserting form fields in an RTF template see [Insert a Field](#).

## Process Overview for Creating and Implementing XSL Sub Templates

You must follow this process when working with XSL sub templates.

Creating and implementing an XSL sub template consists of the following steps:

1. Create the XSL file that contains the common components or processing instructions to include in other templates.

An XSL sub template consists of one or more XSL template definitions. These templates contain rules to apply when a specified node is matched.

2. Create the calling or "main" layout that includes a command to "import" the sub template to the main template and a command to apply the XSL sub template to the appropriate data element.
3. Upload the main template to the report definition and create the Sub Template object in the catalog.

## Create an XSL Subtemplate File

Enter the instructions in an editor that enables you to save the file as type ".xsl". An XSL subtemplate consists of one or more XSL template definitions. These templates contain rules to apply when a specified node is matched.

The syntax of the subtemplate definition is as follows:

```
<xsl:template
  name="name"
  match="pattern"
  mode="mode"
  priority="number">
  <!--Content:(<xsl:param>*,template) -->
</xsl:template>
```

The following table describes the components of the template declaration.

Component	Description
xsl:template	The xsl:template element is used to define a template that can be applied to a node to produce a desired output display.
name="name"	Optional. Specifies a name for the template. If this attribute is omitted, a match attribute is required.
match="pattern"	Optional. The match pattern for the template. If this attribute is omitted, a name attribute is required.
priority="number"	Optional. A number which indicates the numeric priority of the template. More than one template can be applied to a node. The highest priority value template is always chosen. The value ranges from -9.0 to 9.0.

Example:

```
<xsl:template match="P|p">
  <fo:block white-space-collapse="false" padding-bottom="3pt" linefeed-treatment="preserve">
    <xsl:apply-templates select="text()|*|@"/*"/>
  </fo:block>
</xsl:template>

<xsl:template match="STRONG|B|b">
  <fo:inline font-weight="bold">
    <xsl:apply-templates/>
  </fo:inline>
</xsl:template>
```

## Call an XSL Subtemplate from the Main Template

To implement the subtemplate in the main template, make two entries in the main template.

First, import the subtemplate file to the main template. The import syntax tells the Publisher engine where to find the Sub Template in the catalog.

Second, enter a call command to render the contents of the subtemplate at the position desired.

### Import the Subtemplate

Enter the import command anywhere in the main template prior to the call template command as shown here.

```
<?import:xsl:/{path to subtemplate.xsb}?>
```

where

*path to subtemplate.xsb* is the path to the subtemplate .xsb object in the catalog.

For example:

```
<?import:xsl:///Executive/Financial Reports/mySubtemplate.xsb?>
```

### Call the Subtemplate

The template statements that you defined within the XSL subtemplate file are applied to data elements. There are two ways you can call a template defined in the imported XSL subtemplate.

- By matching the data content with the match criteria:

```
<xsl:apply-templates select="data_element"/>
```

This method applies all the templates that are defined in the XSL subtemplate to the `data_element` specified. Based on the data content of `data_element`, appropriate functions in those templates are applied. See the following use case for a detailed example: [Handle XML Data with HTML Formatting](#).

- By calling a template by name:

```
<xsl:call-template name="templateName"/>
```

This method calls the template by name and the template executes, similar to a function call. Here also parameters can be passed to the template call, similarly to an RTF subtemplate. See [Pass Parameters to an XSL Subtemplate](#).

See the following use case for a detailed example: [Dynamically Apply Formatting to a Portion of Data](#).



## Pass Parameters to an XSL Subtemplate

Declare the parameter in the <xsl:template> definition.

To pass parameters to the XSL subtemplate:

1. Declare the parameter in the <xsl:template> definition, as follows:

```
<xsl:template name="templateName" match="/">
  <xsl:param name="name" />
</xsl:template>
```

2. Then call this template using the following syntax:

```
<xsl:call-template name="templateName">
  <xsl:with-param name="name" select="expression">
    <!-- Content:template -->
  </xsl:with-param>
</xsl:call-template>
```

## Create the Sub Template Object in the Catalog

Follow these steps to upload the sub template file.

**To upload the sub template file:**

1. On the global header click **New** and then click **Sub Template**. This launches an untitled Sub Template page.
2. In the **Templates** region, click **Upload** to launch the Upload Template File dialog.
3. Browse for and select the sub template file.
  - **Type:** Select xsl for an XSL sub template file.
  - **Locale:** Select the appropriate locale for the sub template file.
4. Click **Upload**.

The sub template file is displayed in the **Templates** region as the locale name that you selected (for example: en\_US).

5. Click **Save**. In the Save As dialog choose the catalog folder in which to save the Sub Template. Enter the **Name** and click **Save**.

The Sub Template object is saved with the extension ".xsb". Use the Name that you choose here with the .xsb extension when you import the Sub Template to the report (for example: MySubtemplate.xsb).

Translations are not supported for XSL Sub Templates.

## Example Uses of XSL Subtemplates

These are examples of formatting that can be achieved in a report by using XSL subtemplates.

- [Handle XML Data with HTML Formatting](#)
- [Dynamically Apply Formatting to a Portion of Data](#)

## Handle XML Data with HTML Formatting

If you have XML data that already contains HTML formatting and you want to preserve that formatting in the report, then you can preserve that formatting by using an XSL subtemplate to map the HTML formatting commands to XSL equivalents that can be handled by Publisher.

Note that the HTML must be in XHTML format. This means that all HTML tags must have start and end tags in the data. For example, if the data uses a simple `<BR>` for a break, then you must add the closing `</BR>` before you can use this solution.

Following is some sample data with HTML formatting:

```
<DATA>
<ROW>
  <PROJECT_NAME>Project Management</PROJECT_NAME>
  <PROJECT_SCOPE>
    <p>Develop an application to produce <i>executive-level summaries</i> and detailed project reports. The
application will allow users to: </p>
    <p>Import existing MS Project files </p>
    <p>Allow the user to map file-specific resources to a central database entities (i.e., people) and projects; </p>
    <p>Provide structured output that can be viewed by staff and executives. </p>
  </PROJECT_SCOPE>
  <PROJECT_DEFINITION><b>Information about current projects is not readily available to executives.</b>
Providing this information creates a reporting burden for IT staff, who may already maintain this information in
Microsoft Project files. </PROJECT_DEFINITION>
</ROW>
</DATA>
```

Assume a report requirement to display this to retain the formatting supplied by these tags as shown in the following figure:

Project Name	Project Management
Project Scope	Develop an application to produce <i>executive-level summaries</i> and detailed project reports. The application will allow users to: Import existing MS Project files Allow the user to map file-specific resources to a central database entities (i.e., people) and projects; Provide structured output that can be viewed by staff and executives.
Project Definition	<b>Information about current projects is not readily available to executives.</b> Providing this information creates a reporting burden for IT staff, who may already maintain this information in Microsoft Project files.

The following subtemplate uses XSL syntax to match the three HTML tags in the XML data. The template then replaces the matched HTML string with its XSLFO equivalent.

```
<xsl:template match="P|p">
  <fo:block white-space-collapse="false" padding-bottom="3pt" linefeed-treatment="preserve">
    <xsl:apply-templates select="text()|*|@*" />
  </fo:block>
</xsl:template>

<xsl:template match="STRONG|B|b">
```

```

        <fo:inline font-weight="bold">
            <xsl:apply-templates/>
        </fo:inline>
    </xsl:template>

    <xsl:template match="EM|i">
        <fo:inline font-style="italic">
            <xsl:apply-templates/>
        </fo:inline>
    </xsl:template>

```

To use an XSL syntax:

1. Upload the XSL subtemplate file to the Publisher catalog location: Shared Folders/Projects. Save this subtemplate file as `htmlmarkup.xsb`.
2. In the main template enter the following to import the subtemplate file:
 

```
<?import:xsl:///Projects/htmlmarkup.xsb?>
```
3. For each field that has HTML markup, call the `xsl:apply-template` command. In this example, there're two fields:

```

<xsl:apply-templates select="PROJECT_SCOPE"/>
<xsl:apply-templates select="PROJECT_DEFINITION"/>

```

The command tells the processor to apply all templates to the value of the element `PROJECT_SCOPE` and `PROJECT_DEFINITION`. It then cycles through the subtemplate functions looking for a match.

## Dynamically Apply Formatting to a Portion of Data

This application of subtemplates is useful for documents that require chemical formulae, mathematical calculations, or superscripts and subscripts.

For example, in the sample XML data below `CO2` is expected to display as `CO2` and `H2O` is expected to display as `H2O`.

```

<ROWSET>
  <ROW>
    <FORMULA>CO2</FORMULA>
  </ROW>
  <ROW>
    <FORMULA>H2O</FORMULA>
  </ROW>
</ROWSET>

```

This can be achieved by using an XSL subtemplate. Using XSL syntax you can define a template with any name, for example, `"chemical_formatter"` that accepts the `FORMULA` field as a parameter, and then reads one character at a time. It compares the character with 0 - 9 digits, and if there's a match, then that character is subscripted using the following XSL FO syntax:

```
<fo:inline baseline-shift="sub" font-size="75%">
```

Here is sample code for the XSL template statement:

```
<xsl:template name="chemical_formatter">
<!-- accepts a parameter e.g. H2O -->
<xsl:param name="formula"/>
<!-- Takes the first character of the string and tests it to see if it is a number between 0-9 -->
<xsl:variable
name="each_char"
select="substring($formula,1,1)"/>
<xsl:choose>
  <xsl:when test="$each_char='1' or $each_char='2'
or $each_char='3' or $each_char='4' or $each_char='5'
or $each_char='6' or $each_char='7' or $each_char='8'
or $each_char='9' or $each_char='0'">
    <!-- if it is numeric it sets the FO subscripting properties -->
    <fo:inline baseline-shift="sub" font-size="75%">
      <xsl:value-of select="$each_char"/>
    </fo:inline>
  </xsl:when>
  <xsl:otherwise>
    <!-- otherwise the character is left as is -->
    <fo:inline baseline-shift="normal">
      <xsl:value-of select="$each_char"/>
    </fo:inline>
  </xsl:otherwise>
</xsl:choose>
<!-- test if there are other chars in the string, if so then recall the template -->
<xsl:if test="substring-after($formula,$each_char) != ''">
  <xsl:call-template name="chemical_formatter">
    <xsl:with-param name="formula">
      <xsl:value-of select="substring-after($formula,$each_char)"/>
    </xsl:with-param>
  </xsl:call-template>
</xsl:if>
</xsl:template>
```

To use this XSL template statement:

1. Save this file as chemical.xsl.
2. Follow the instructions in [Upload a Subtemplate](#). Assume that you name the Sub Template "Chemical" (it's saved as Chemical.xsb) and place it in the following location: Shared Folders/Subtemplates.
3. In the main RTF template enter the import syntax:

```
<?import:xdoxsl:///Subtemplates/Chemical.xsb?>
```

4. To render the XSL code in the report, create a loop over the data and in the VALUE field use:

```
<xsl:call-template name="chemical_formatter">
  <xsl:with-param name="formula" select="VALUE"/>
</xsl:call-template>
```

This calls the formatting template with the FORMULA value that is, H2O. Once rendered, the formulae are shown as expected: H<sub>2</sub>O.

# Part IV

## Translate Objects in Pixel-Perfect Reports

This part provides information about translating reports and catalog objects.

### Topics:

- [Translation Support Overview and Concepts](#)
- [Translate Individual Templates](#)
- [Translate Catalog Objects, Data Models, and Templates](#)

# Translation Support Overview and Concepts

This topic provides an overview of concepts related to report and catalog translation in Publisher.

## Topics:

- [What Can I Translate in Publisher?](#)
- [Work with Translation Files](#)
- [Locale Selection Logic](#)

## What Can I Translate in Publisher?

You can translate reports and objects in the catalog in Publisher, as described in these sections:

- [What Languages Does Publisher Support?](#)
- [Can I Translate Objects in the Catalog?](#)
- [Can I Translate Templates?](#)

## Can I Translate Objects in the Catalog?

Yes, you can translate objects in the catalog. You can extract the translatable strings from all objects contained in a selected folder in the catalog into a separate file.

If Publisher is integrated with Oracle Business Intelligence Enterprise Edition, Publisher catalog translation (folder and report, data model, style template and sub template names) is ignored. The Oracle BI Enterprise Edition catalog translation mechanism is applied instead.

You can translate the separate string file, upload the translated file back to the system, and assign it the appropriate language code. When you extract the strings from the report layouts, you also extract the user-interface strings that are displayed such as descriptions of catalog objects and names of report parameters and data displays.

Users viewing the catalog see the item translations that are appropriate for the user interface language that they selected in their My Account preferences. Users see report translations that are appropriate for the Report Locale that they selected in their My Account preferences.

## Can I Translate Templates?

Yes, you can translate templates by extracting the translatable strings from a single RTF-based template (including sub templates and style templates) or a single Publisher layout template (.xpt) file.

Translate a template when you need only the final report documents translated. For example, you must generate translated invoices to send to German and Japanese customers.

## What Languages Does Publisher Support?

Publisher supports the languages supported by the JRE in use.

See [JDK and JRE Supported Languages](#).

## Work with Translation Files

When you extract the translatable strings for a catalog or template translation, Publisher creates an XLIFF file that contains the strings.

You can translate these strings within your organization or send the file to a localization provider. You then upload the translated XLIFF file back to the catalog or the individual layout and assign it the appropriate locale.

This section describes how to work with an XLIFF file. It contains the following topics:

- [What is an XLIFF?](#)
- [What is the Structure of an XLIFF File?](#)

## What is an XLIFF?

XLIFF is the XML Localization Interchange File Format.

It's the standard format used by localization providers. For more information about the XLIFF specification, see <http://www.oasis-open.org/committees/xliff/documents/xliff-specification.htm>

## What is the Structure of an XLIFF File?

XLIFF files must follow a specific structure that's shown in the following example:

```
<xliff>
  <file>
    <header>
    <body>
      <trans-unit>
        <source>
        <target>
        <note>
```

The following illustration shows an excerpt from an untranslated XLIFF file.

```

<?xml version = '1.0' encoding = 'utf-8' ?>
<xliff version="1.0">
  <file source-language="en-US" target-language="en-US" datatype="XDO" original="orphan">
    <header/>
    <body>
      <trans-unit id="d678c24b" maxbytes="4000" maxwidth="90" size-unit="char" translatable="yes">
        <source>Italian Purchase VAT Register - [&1;]</source>
        <target>Italian Purchase VAT Register - [&1;]</target>
        <note>Text located: header/table, token &1;:anonymous placeholder(s)</note>
      </trans-unit>
      <trans-unit id="4d3eb24" maxbytes="4000" maxwidth="15" size-unit="char" translatable="yes">
        <source>Total</source>
        <target>Total</target>
        <note>Text located: body/table</note>
      </trans-unit>
      <trans-unit id="aeccc17e" maxbytes="4000" maxwidth="37" size-unit="char" translatable="yes">
        <source>Non-Recoverable</source>
        <target>Non-Recoverable</target>
        <note>Text located: body/table</note>
      </trans-unit>
      .
      .
      .
    </body>
  </file>
</xliff>

```

## Source-language and Target-language Attributes

The `<file>` element includes the source-language and target-language attributes.

The valid value for source-language and target-language attributes is a combination of the language code and country code as follows:

- the two-letter ISO 639 language code
- the two-letter ISO 3166 country code

For more information on the International Organization for Standardization (ISO) and the code lists, see the International Organization for Standardization website.

For example, the value for English-United States is "en-US". This combination is also referred to as a *locale*.

When you edit the exported XLIFF file, you must change the target-language attribute to the appropriate locale value of the target language. The following table shows examples of source-language and target-language attribute values appropriate for the given translations.

Translation (Language/Territory)	source-language value	target-language value
From English/US To English/Canada	en-US	en-CA
From English/US To Chinese/China	en-US	zh-CN
From Japanese/Japan To French/France	ja-JP	fr-FR

## Embedded Data Fields

Some templates contain placeholders for data fields embedded in the text display strings of the report. Use token to identify the embedded data fields.



Don't edit or delete the embedded data field tokens to avoid merging of the XML data with the template.

For example, the title of the sample report is: Italian Purchase VAT Register - (year)

where (year) is a placeholder in the RTF template that is populated at runtime by data from an XML element. These fields aren't translatable, because the value comes from the data at runtime.

To identify embedded data fields, the following token is used in the XLIFF file:

[&amp;n]

where *n* represents the numbered occurrence of a data field in the template.

For example, in the preceding XLIFF sample, the first translatable string is:

```
<source>Italian Purchase VAT Register - [&amp;1]</source>
```

## <source> and <target> Elements

Each <source> element contains a translatable string from the template in the source language of the template. Refer to the illustration for information to create a translation for a source element string.

For example,

```
<source>Total</source>
```

When you initially export the XLIFF file for translation, the source and target elements are all identical. To create the translation for this template, enter the appropriate translation for each source element string in its corresponding <target> element.

Therefore if you were translating the sample template into German, you would enter the following for the Total string:

```
<source>Total</source>  
<target>Gesamtbetrag</target>
```

The following figure shows the sample XLIFF file from the previous figure updated with the Chinese translation:



## Locale Selection Logic

Publisher applies a translation based on the user's selected Report Locale.

Publisher first tries to match an RTF template named for the locale, then an XLIFF file named for the locale. If an exact match on language-territory isn't found, then Publisher tries to match on language only.

For example, if you have a report for which the base template is called EmployeeTemplate.rtf and the locale selected is French (France), then Publisher selects the translation to apply according to the following hierarchy:

EmployeeTemplate.rtf (fr\_FR)

EmployeeTemplate.xlf (fr\_FR)

EmployeeTemplate.rtf (fr)

EmployeeTemplate.xlf (fr)

EmployeeTemplate.rtf (default)

With the same set of translations, if the locale selected is French (Switzerland), then the EmployeeTemplate.rtf (fr) is applied. Now if the available translations are limited to the following set:

EmployeeTemplate.rtf (fr\_FR)

EmployeeTemplate.xlf (fr\_FR)

EmployeeTemplate.rtf (default)

and the locale selected is French (Switzerland), then the EmployeeTemplate.rtf (default) is applied. Even though there's a language match, Publisher doesn't match the different locales.

Therefore, to ensure that a French language translation is used when French is the selected language, regardless of the selected locale, you must include either an rtf or xlf file named for the language only (that is, EmployeeTemplate\_fr.rtf or EmployeeTemplate\_fr.xlf).

# Translate Individual Templates

This topic describes how to create and upload translated template files to provide translations for specific templates.

## Topics:

- [Overview](#)
- [Types of Translations](#)
- [Use the XLIFF Option](#)
- [Use the Localized Template Option](#)

## Overview

This chapter describes how to create and upload translated template files when you want to provide translations only for specific templates.

The following template types can be translated individually:

- RTF layout files
- style templates
- RTF subtemplates
- Publisher layouts (.xpt)

## Types of Translations

You can add different types of translations to templates.

There are two options for adding translations for templates:

- Create a separate RTF template that is translated (a localized template). This option is available for RTF templates only.  
Use this option if the translated template requires a different layout from the original template.
- Generate an XLIFF from the original template. At run time, the original template is applied for the layout and the XLIFF is applied for the translation.

Use this option if you require only translation of the text strings of the template layout.

## Use the XLIFF Option

The XLIFF option is used to translate files.

The following sections describe using the XLIFF option:

- [Generate the XLIFF from a Template](#)
- [Translate the XLIFF](#)

- [Upload the Translated XLIFF to Publisher](#)

## Generate the XLIFF from a Template

These sections describe the two methods for generating an XLIFF for a single template file.

- [Generate the XLIFF from the Template Builder](#) (not supported for XPT templates)
- [Generate the XLIFF from the Layout Properties Page](#)

## Generate the XLIFF from the Template Builder

Follow these steps to generate the XLIFF from the template builder.

This procedure assumes that you've installed the Publisher Template Builder for Microsoft Word.

To generate an XLIFF from the Template Builder:

1. Open the template in Microsoft Word with the Template Builder for Word installed.
2. On the **Template Builder** tab, in the Tools group, click **Translation**, and then click **Extract Text**.

Publisher extracts the translatable strings from the template and exports them to an XLIFF (.xlf file).

3. Save the XLIFF to a local directory.

## Generate the XLIFF from the Layout Properties Page

You can generate the XLIFF file for report layout templates or for style templates and subtemplates.

To generate the XLIFF file for report layout templates:

1. Navigate to the report in the catalog and click **Edit** to open it for editing.
2. From the thumbnail view of the report layouts, click the **Properties** link of the layout (RTF or XPT) to open the Layout Properties page.
3. In the Translations region, click **Extract Translation**.

Publisher extracts the translatable strings from the template and exports them to an XLIFF (.xlf) file.

4. Save the XLIFF file to a local directory.

To generate the XLIFF file for style templates and subtemplates:

1. Navigate to the style template or sub template in the catalog and click **Edit** to open the Template Manager.
2. In the Translations region, click **Extract Translation**.

Publisher extracts the translatable strings from the template and exports them to an XLIFF (.xlf) file.

3. Save the XLIFF file to a local directory.

## Translate the XLIFF

When you've downloaded the XLIFF file, it can be sent to a translation provider, or using a text editor, you can enter the translation for each string.

A "translatable string" is any text in the template that is intended for display in the published report, such as table headers and field labels. Text supplied at runtime from the data isn't translatable, nor is any text that you supply in the Microsoft Word form fields.

You can translate the template XLIFF file into as many languages as desired and associate these translations to the original template. Ensure that when you save your translated file, you save it with UTF-8 encoding.

## Upload the Translated XLIFF to Publisher

After a XLIFF file is translated, upload the XLIFF file to Publisher.

To upload the translated XLIFF:

1. Navigate to the report, subtemplate, or style template in the catalog and click **Edit** to open it for editing.

For reports only:

From the thumbnail view of the report layouts, click the **Properties** link of the layout to open the Template Manager.

2. In the **Translations** region, click the **Upload** toolbar button.
3. In the **Upload Translation File** dialog, locate the file in a local directory and select the **Locale** for this translation.
4. Click **OK** to upload the file and view it in the **Translations** table.

## Use the Localized Template Option

If you must design a different layout for the reports that you present for different localizations, then you can create a new RTF file that is designed and translated for the locale and upload this file to the Template Manager.

The localized template option isn't supported for XPT templates. The following sections describe using the localized template option:

- [Design the Localized Template File](#)
- [Upload the Localized Template to Publisher](#)

## Design the Localized Template File

Use the same tools that you used to create the base template file, translating the strings and customizing the layout as desired for the locale.

## Upload the Localized Template to Publisher

You can upload several types of templates to Publisher.

To upload the localized template:

1. Navigate to the report, subtemplate, or style template in the catalog and click **Edit** to open it for editing.

For reports only:

From the thumbnail view of the report layouts, click the **Properties** link of the layout to open the Template Manager.

2. In the **Templates** region, click the **Upload** toolbar button.
3. In the Upload Template File dialog, locate the file in a local directory, select rtf as the **Template Type** and select the **Locale** for this template file.
4. Click **OK** to upload the file and view it in the **Templates** table.

# Translate Catalog Objects, Data Models, and Templates

This topic describes translating the catalog objects, data models, and templates using the Export XLIFF function that is available at the catalog level.

## Topics:

- [Overview](#)
- [What Can Be Translated?](#)
- [Export the XLIFF File](#)
- [Identify and Update the Object Tags](#)
- [Import the XLIFF File](#)

## Overview

This chapter describes how to use the Export XLIFF function that is available at the catalog level.

When you select a folder and choose this option, a single XLIFF file is generated that contains the translatable strings from the catalog objects contained in the folder; and the RTF and XPT templates contained in the folder. See the following section for the detailed list of what is translatable.

The target strings in the generated XLIFF file can be translated into the desired language. The XLIFF can then be uploaded back to the repository and assigned the appropriate locale. The translated strings from the XLIFF are displayed when a user selects the target language as their UI language (for catalog object strings) or selects the target language as their Report Locale (for report template strings).

If Publisher is integrated with Oracle Business Intelligence Enterprise Edition, then Publisher catalog object string translation (folder and report, data model, style template and sub template names) is ignored. The Oracle BI Enterprise Edition catalog translation mechanism is applied instead.

## What Can Be Translated?

Specific strings can be translated into different languages.

The following table shows what strings can be translated.

Object	What Can Be Translated	Preference That Determines Translation Displayed
Folder	Name Description	UI Language (applies to all)
Data Model	Name Description Data Display Name	UI Language (applies to all)



Object	What Can Be Translated	Preference That Determines Translation Displayed
Report	Name Description Layout Names Data Model Reference Parameter Name	UI Language (applies to all)
Style Template	Name Static text in the template	UI Language Report Locale
Sub Template	Name Static text in the template	UI Language Report Locale
Publisher Layouts (.xpt)	Static text in the layout	Report Locale
RTF Layouts	Static text in the layout	Report Locale

## About Source Language Limitations

Translation of Publisher catalog objects using the Export XLIFF function is available at the catalog level.

For catalog translation, the source language is limited to "en". You must create catalog and data model objects in English locale to be able to translate them.

## Export the XLIFF File

Follow these steps to export an XLIFF file for a catalog folder.

1. Select the folder in the catalog.
2. Click the **Translation** toolbar button and then click **Export XLIFF**.

Publisher extracts the translatable strings from the catalog folder objects and exports them to an XLIFF (.xlf file).

3. Save the XLIFF file to a local directory.

## Identify and Update the Object Tags

In the XLIFF file generated for a catalog object, the source-language and target-language attributes contain values for the two-letter language code.

For information on how to manually update the XLIFF files with translation strings, see [What is an XLIFF?](#)

## Import the XLIFF File

When the target tags have been translated you are ready to import the XLIFF file back to Publisher.

To import an XLIFF file:

1. Navigate to the folder from which the XLIFF file was generated.
2. From the toolbar, click the **Translation** button and select **Import XLIFF**.
3. In the Upload dialog click **Browse** to locate the translated file and then select the appropriate locale from the list.
4. Click **Upload**.

# Part V

## Reference Information

This part provides reference information for pixel-perfect reports.

### Topics:

- [Techniques for Handling Large Output Files](#)
- [Extended Function Support in RTF Templates](#)
- [Design Accessible Reports](#)
- [Supported XSL-FO Elements](#)
- [Generate PDF/A and PDF/X Output](#)
- [Generate Accessible PDF Output](#)
- [Generate CSV Output](#)
- [PDF Version Support](#)
- [Test Templates with Template Viewer](#)
- [Frequently Asked Questions for Publisher Data Models and Reports](#)

# Techniques for Handling Large Output Files

This topic describes techniques that are available to improve performance when the report generates very large PDF output files.

## Topics:

- [Reuse Static Content](#)
- [Generate Zipped PDF Output](#)
- [Implement PDF Splitting for an RTF Template](#)
- [Implement PDF Splitting for a PDF Template](#)

## Reuse Static Content

This section describes how to reuse static, repeating content in a PDF report output to reduce the overall PDF file size.

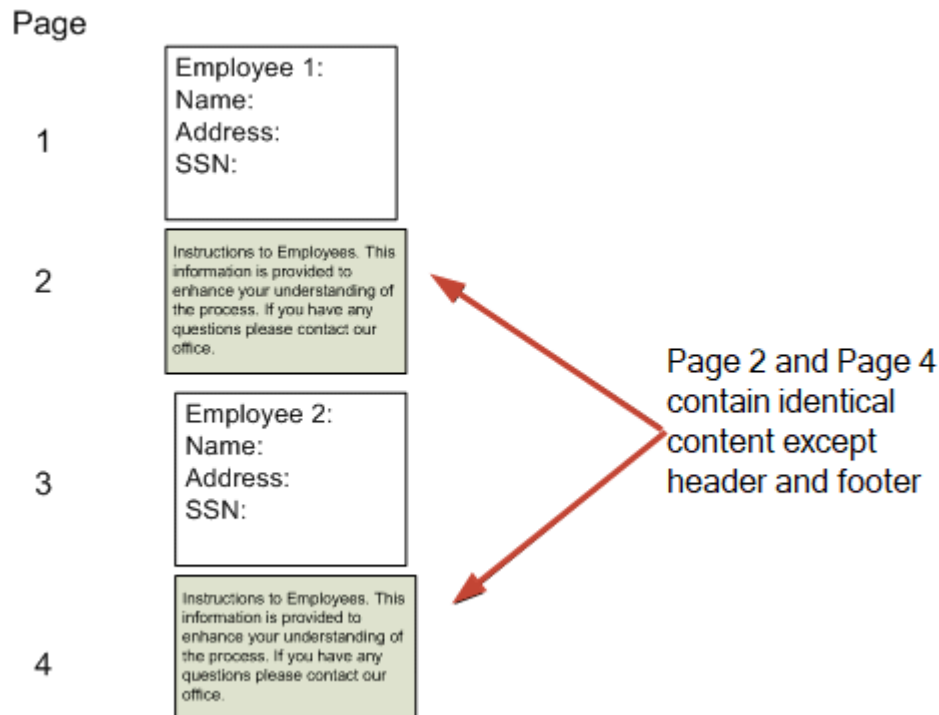
This section contains the following topics:

- [What is Static Content Reuse?](#)
- [Limitations of this Feature](#)
- [Define Reusable Content in an RTF Template](#)
- [Example](#)

## What is Static Content Reuse?

If the report contains static content and the placement of that content in the report is also fixed (for example, a set of instructions on the back of a Federal W-2 form), then you can use this feature to reduce the size of the generated PDF file.

Using the W-2 form as an example, the report has the expected output shown in the following illustration.



For each employee, specific content is rendered, but the back (or second) page of each contains an identical set of instructions.

This set of instructions can be defined as reusable static content. When content is identified as reusable static content, the PDF document includes the static content only once and references it in other places when needed, thereby reducing the overall output file size.

## Limitations of this Feature

This feature has the following limitations.

- The static content to be reused in the generated report must fit onto one page of the generated PDF output.
- The contents of the report before the static content must have a fixed height. For example, the W-2 form has a fixed set of fields that occur before the static content is to be rendered. The reusable static contents are placed in the same position from the page origin for each occurrence.
- This feature can only be used with RTF templates generating PDF output.

## Define Reusable Content in an RTF Template

To define the static content to be reused, use these tags around the content in the template.

```
<?reusable-static-content:?>
```

... *static content here* ...

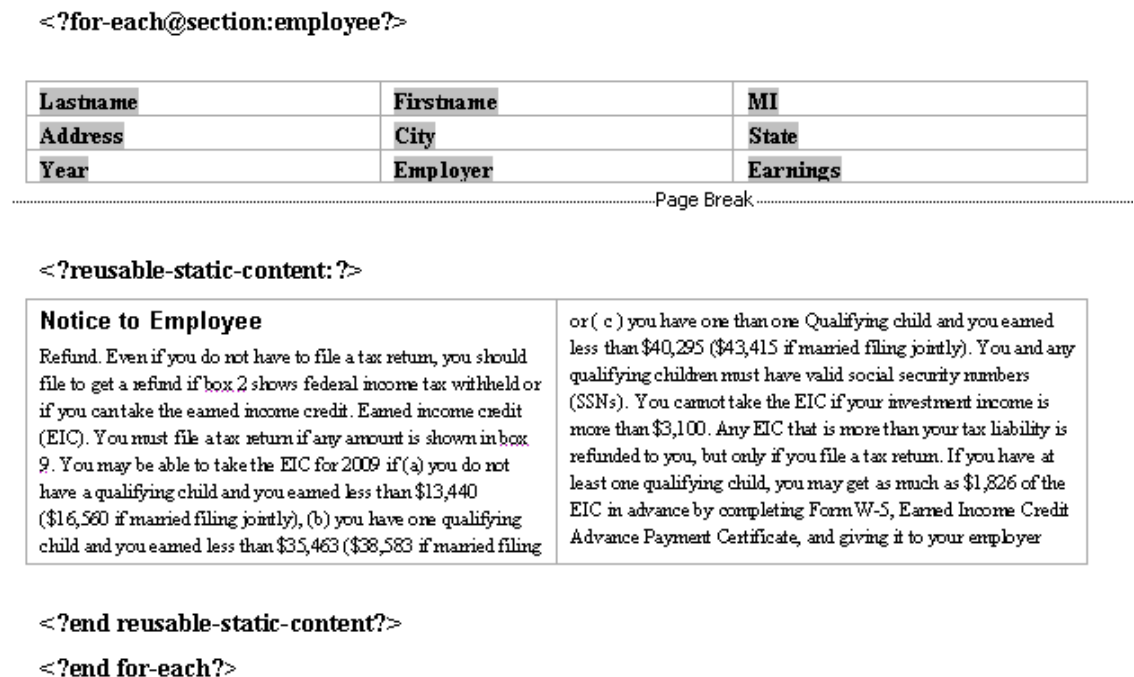
```
<?end reusable-static-content?>
```

Inserting these tags around the static content signals Publisher to include this content only once in the generated file and then reference it in the same position for each occurrence.

## Example

This example illustrates an implementation of this feature. The sample report generates one occurrence per employee. The generated report has employee-specific information on the front page of each occurrence, and static instructions that print on the back of each occurrence. A section break occurs after each employee to reset page numbering.

The following figure illustrates the template structure:



## Generate Zipped PDF Output

When generating PDF output, Publisher doesn't limit the size of the output file. However, when the size of the file approaches 2 GB, Adobe Acrobat Reader may no longer be able to open or handle the file. Publisher provides a feature to split a large PDF output file into smaller, more manageable files, while still maintaining the integrity of the report as one logical unit.

When PDF output splitting is enabled for a report, the report is split into multiple files generated in one zip file. The output type is PDFZ. For easy access to the component files, Publisher also generates an index file that specifies from and to elements contained in each component PDF file.

To enable this feature, the report designer must set up the report using the methods described in this section.

## Limitations and Prerequisites

Perform these steps before using this feature, and be aware of its functional limitations.

- This feature is supported only for PDF output that is generated from an RTF template or a PDF template.
- Dataset input to the report must be flat XML data (that is, ROWSET/ROW). The dataset cannot be hierarchical or concatenated.
- The dataset must be sorted by the element designated as the "repeat" element (as described below).

## Design Time Considerations

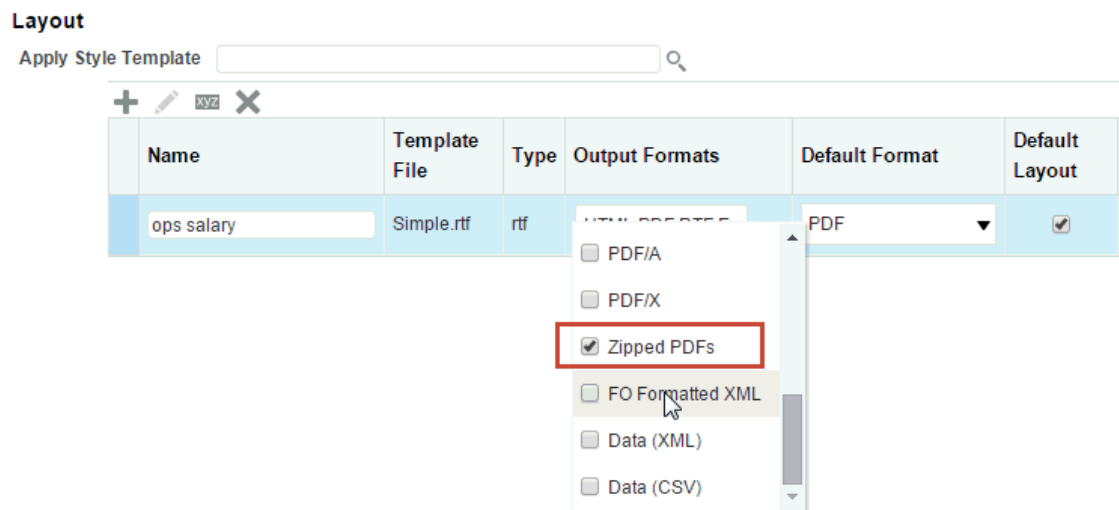
To enable report splitting, the report designer must determine these steps.

- Select a *repeat* element to serve as the counter.
- Determine how many instances of the repeat element occur per PDF file.
- Select which data elements to include in the generated index file.

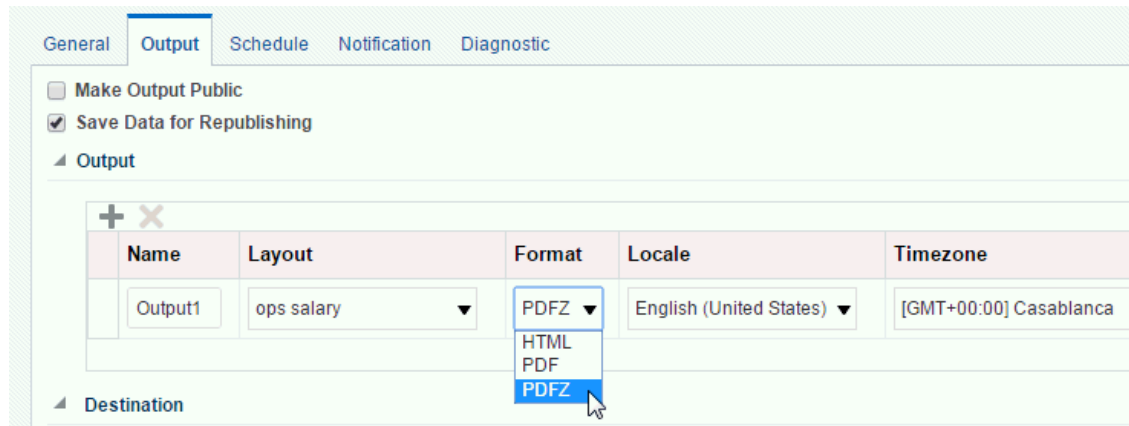
## Select the Output Type

After uploading the template to the report definition, enable Zipped PDFs as an output type.

The output type menu is shown in the following illustration.



When scheduling the report, select PDFZ as the output type, as shown in the following illustration.



## Implement PDF Splitting for an RTF Template

This section describes how to enable PDF splitting for reports generated from RTF templates.

This section includes the following topics:

- [Enter the Commands in an RTF Template](#)
- [Example - split by each department](#)

### Enter the Commands in an RTF Template

When you design a template to use this feature, you must add commands to specify these queries.

- What element in the data is repeated (using the simple for-each command)
- How many occurrences of the element are included in each PDF file
- What information (data elements) to include in the index file

To achieve this, the following two commands must be entered in the template within the for-each loop of the element by which you want the document to split:

- `<?catalog-index-info:name;element_name?>`

where

*name* is the name that you choose that is used in the index file to identify the from and to records included in each document.

*element\_name* is the XML tag name of the element that provides the value for name that you identify above.

The catalog-index-info command defines the construction of the index file that is created.

- `<?if:position() mod n = 0?><?document-split:?><?end if?>`

where

*n* is the number of records you want included per PDF file.

This command must be placed within the for-each loop of the element being counted. This command instructs Publisher to split the document after the next page break when the number of records equals the *n* value.

Each time the document-split is performed, the name-value pairs defined in the catalog-index-info command are written to the index files.

## Example - split by each department

This example is based on the XML data given here.

This example is based on the following XML data:

```
<DATA_DS>
<G_EMP>
  <DEPARTMENT_NAME>Sales</DEPARTMENT_NAME>
  <FIRST_NAME>Ellen</FIRST_NAME>
  <LAST_NAME>Abel</LAST_NAME>
  <HIRE_DATE>1996-05-11T00:00:00.000-07:00</HIRE_DATE>
  <SALARY>11000</SALARY>
</G_EMP>
<G_EMP>
  <DEPARTMENT_NAME>Sales</DEPARTMENT_NAME>
  <FIRST_NAME>Sundar</FIRST_NAME>
  <LAST_NAME>Ande</LAST_NAME>
  <HIRE_DATE>2000-03-24T00:00:00.000-08:00</HIRE_DATE>
  <SALARY>6400</SALARY>
</G_EMP>
<G_EMP>
  <DEPARTMENT_NAME>Shipping</DEPARTMENT_NAME>
  <FIRST_NAME>Mozhe</FIRST_NAME>
  <LAST_NAME>Atkinson</LAST_NAME>
  <HIRE_DATE>1997-10-30T00:00:00.000-08:00</HIRE_DATE>
  <SALARY>2800</SALARY>
</G_EMP>
<G_EMP>
  <DEPARTMENT_NAME>IT</DEPARTMENT_NAME>
  <FIRST_NAME>David</FIRST_NAME>
  <LAST_NAME>Austin</LAST_NAME>
  <HIRE_DATE>1997-06-25T00:00:00.000-07:00</HIRE_DATE>
  <SALARY>4800</SALARY>
</G_EMP>
...
</DATA_DS>
```

In this example, the output PDF report includes a document for each employee. You want a new PDF file generated for each department. You want the index to list the FIRST\_NAME and LAST\_NAME from each record that is included in the PDF file.

To achieve this output, enter the following in the template:

```
<?for-each-group:ROW;./DEPARTMENT_NAME?>
<?for-each:current-group()?>
  <?catalog-index-info:'First Name';FIRST_NAME?>
  <?catalog-index-info:'Last Name';LAST_NAME?>
...
<?end for-each?>
```



```
<?document-split:?>  
<?end for-each-group?>
```

## Implement PDF Splitting for a PDF Template

This section describes the commands required in a PDF template to split the output into multiple PDF files.

### Enter the Commands in the PDF Template

To enable this feature for a PDF template, enter the three form fields listed in this table here in the template with the specified commands in the **Tooltip** field.

Form Field Name	Tooltip Command
REPEAT-ELEMENT	<code>&lt;?repeat-element:element_name?&gt;</code> , where <code>element_name</code> is the XML tag name of the repeating element that is counted. Example: <code>&lt;?repeat-element:emp_id?&gt;</code>
CATALOG-INDEX-INFO	<code>&lt;?catalog-index-info:'Name';element_name?&gt;</code> , where <code>Name</code> is the label that appears in the index file for the <code>element_name</code> that you specify. The index generates a <i>From</i> and <i>To</i> listing for each file in the zipped set. Example: <code>&lt;?catalog-index-info:'Last Name';LAST_NAME?&gt;</code> You can include multiple occurrences of the <code>catalog-index-info</code> command to include multiple data elements in the index file.
SPLIT-COUNT	<code>&lt;?split-count:n?&gt;</code> , where <code>n</code> is the number of occurrences of the repeat-element that triggers the creation of a new file. Example: <code>&lt;?split-count:10000?&gt;</code>

# Extended Function Support in RTF Templates

This topic describes SQL and XSL functions extended by Publisher for use in RTF templates.

## Topics:

- [Extended SQL and XSL Functions](#)
- [XSL Equivalents](#)
- [Use FO Elements](#)

## Extended SQL and XSL Functions

Publisher has extended a set of SQL and XSL functions for use in RTF templates.

The syntax for these extended functions is

`<?xdofx:expression?>`

for extended SQL functions or

`<?xdoxslt:expression?>`

for extended XSL functions.

You can't mix `xdofx` statements with XSL expressions in the same context. For example, assume that you had two elements, `FIRST_NAME` and `LAST_NAME` to concatenate into a 30-character field and right pad the field with the character "x". You couldn't use the following:

`<?xdofx:rpadd(concat(FIRST_NAME, LAST_NAME), 30, 'x')?>`

because `concat` is an XSL expression. Instead, you could use the following:

`<?xdofx:rpadd(FIRST_NAME||LAST_NAME), 30, 'x')?>`

The supported functions are shown in the following table:

SQL Statement or XSL Expression	Usage	Description
2+3	<code>&lt;?xdofx:2+3?&gt;</code>	Addition
2-3	<code>&lt;?xdofx:2-3?&gt;</code>	Subtraction
2*3	<code>&lt;?xdofx:2*3?&gt;</code>	Multiplication
2 div 3	<code>&lt;?xdofx:2 div 3?&gt;</code>	Division
2**3	<code>&lt;?xdofx:2**3?&gt;</code>	Exponential
3  2	<code>&lt;?xdofx:3  2?&gt;</code>	Concatenation

SQL Statement or XSL Expression	Usage	Description
sdiv()	<?xdoxslt:sdiv(num1,num2, string)?>	Returns a specified value if the result of the function is not a number (NaN). In the syntax shown, num1 is the dividend; num2 is the divisor and string is the value to be returned if NaN is returned.  Examples: <?xdoxslt:sdiv(10,0, '0')?> would yield '0' <?xdoxslt:sdiv(10,0, 'None')?> would yield 'None'.
lpad()	<?xdofx:lpad('aaa',10,'.')?>	Pads the left side of a string with a specific set of characters. The syntax for the lpad function is: <i>lpad(string1,padded_length,[pad_string])</i> <i>string1</i> is the string to pad characters to (the left-hand side). <i>padded_length</i> is the number of characters to return. <i>pad_string</i> is the string that is padded to the left-hand side of <i>string1</i> .
rpadd()	<?xdofx:rpadd('aaa',10,'.')?>	Pads the right side of a string with a specific set of characters. The syntax for the rpadd function is: <i>rpadd(string1,padded_length,[pad_string])</i> . <i>string1</i> is the string to pad characters to (the right-hand side). <i>padded_length</i> is the number of characters to return. <i>pad_string</i> is the string that is padded to the right-hand side of <i>string1</i> .
trim()	<?xdoxslt:trim(' a ')?>	Removes spaces in a string. Enter the text to be trimmed, the function returns the trimmed text.
ltrim()	<?xdoxslt:ltrim(' a ')?>	Removes the leading white spaces in a string.
rtrim()	<?xdoxslt:rtrim(' a ')?>	Removes the trailing white spaces in a string.
truncate()	<?xdoxslt:truncate ( <i>number</i> [, <i>integer</i> ] )?>	Returns <i>number</i> truncated to <i>integer</i> places right of the decimal point. If <i>integer</i> is omitted, then <i>number</i> is truncated to the whole integer value. <i>integer</i> can be negative to truncate values left of the decimal point. <i>integer</i> must be an integer. Example: <?xdoxslt:truncate(-2.3333)?> returns -2 Example: <?xdoxslt:truncate(2.7777, 2)?> returns 2.77 Example: <?xdoxslt:truncate(27.7777, -1)?> returns 20
replicate()	<?xdoxslt:replicate('string', <i>integer</i> )?>	Replicates the specified string the specified number of times. Example: <?xdoxslt:replicate('oracle', 3)?> returns oracleoracleoracle
decode()	<?xdofx:decode('xxx','bbb','ccc','xxx','ddd')?>	Uses the functionality of an IF-THEN-ELSE statement. The syntax for the decode function is: <i>decode(expression, search, result [,search, result]...[, default])</i> <i>expression</i> is the value to compare. <i>search</i> is the value that is compared against expression. <i>result</i> is the value returned, if expression is equal to search. <i>default</i> is returned if no matches are found.

SQL Statement or XSL Expression	Usage	Description
instr()	<?xdoxf:instr('abcabcabc','a',2)?>	Returns the location of a substring in a string. The syntax for the instr function is: instr(string1,string2,[start_position],[nth_appearance]) <i>string1</i> is the string to search. <i>string2</i> is the substring to search for in <i>string1</i> . <i>start_position</i> is the position in <i>string1</i> where the search starts. The first position in the string is 1. If the <i>start_position</i> is negative, the function counts back <i>start_position</i> number of characters from the end of <i>string1</i> and then searches towards the beginning of <i>string1</i> . <i>nth_appearance</i> is the <i>nth</i> appearance of <i>string2</i> .
substr()	<?xdoxf:substr('abcdefg',2,3)?>	Extracts a substring from a string. The syntax for the substr function is: substr(string, start_position, length) <i>string</i> is the source string. <i>start_position</i> is the position for extraction. The first position in the string is always 1. <i>length</i> is the number of characters to extract.
left()	<?xdoxslt:left('abcdefg', 3)?>	Extracts the specified number of characters from a string, starting from the left. The syntax is left(string, Numchars) For example, <?xdoxslt:left('abcdefg', 3)?> returns abc
right()	<?xdoxslt:right('abcdefg', 3)?>	Extracts the specified number of characters from a string, starting from the right. The syntax is right(string, Numchars) For example, <?xdoxslt:right('abcdefg', 3)?> returns efg
replace()	<?xdoxf:replace(name,'John','Jon')?>	Replaces a sequence of characters in a string with another set of characters. The syntax for the replace function is: replace(string1,string_to_replace,[replacement_string]) <i>string1</i> is the string to replace a sequence of characters with another set of characters. <i>string_to_replace</i> is the string that is searched for in <i>string1</i> . <i>replacement_string</i> is optional. All occurrences of <i>string_to_replace</i> are replaced with <i>replacement_string</i> in <i>string1</i> .
to_number()	<?xdoxf:to_number('12345')?>	Converts char, a value of CHAR, VARCHAR2, NCHAR, or NVARCHAR2 datatype that contains a number in the format that is specified by the optional format model <i>fmt</i> , to a value of NUMBER datatype.
format_number()	<?xdoxslt:format_number(12345, n, \$_XDOLOCALE)?>	Converts a number to a string and formats the number according to the locale specified in <i>\$_XDOLOCALE</i> and to the number of decimal positions specified in <i>n</i> using Java's default symbols. For example: <?xdoxslt:format_number(-12345, 2, 'fr-FR')?> returns -12 345,00
format_number()	<?xdoxslt:format_number(12345, n, s1, s2,\$_XDOLOCALE)?>	Converts a number to a string and uses the specified separators: <i>s1</i> for the thousand separator and <i>s2</i> for the decimal separator. For example: <?xdoxslt:format_number(12345, 2, 'g', 'd', \$_XDOLOCALE)?> returns 12g345d00
pat_format_number()	<?xdoxslt:pat_format_number(12345, '##,##0.00', \$_XDOLOCALE)?>	Returns a number formatted with the specified pattern. For example: <?xdoxslt:pat_format_number(12345, '##,##0.00', \$_XDOLOCALE)?> returns 12,345.00

SQL Statement or XSL Expression	Usage	Description
to_char()	<code>&lt;?xdoctx:to_char(value [,fmt])?&gt;</code>	<p>Converts a value (character, date, or number) to VARCHAR2 datatype, using the optional number format <i>fmt</i>.</p> <p>For example, <code>&lt;?xdoctx:to_char(emp_id)?&gt;</code> returns the employee ID in string format.</p> <p>For example, <code>&lt;?xdoctx:to_char(SYSDATE, 'dd-mm-yyyy')?&gt;</code> returns the current date in dd-mm-yyyy format.</p>
to_date()	<code>&lt;?xdoctx:to_date ( char [,fmt [, 'nlsparam']] )</code>	<p>Converts char of CHAR, VARCHAR2, NCHAR, or NVARCHAR2 datatype to a value of DATE datatype. The <i>fmt</i> is a date format specifying the format of <i>char</i>. If you omit <i>fmt</i>, then <i>char</i> must be in the default date format. If <i>fmt</i> is 'J', for Julian, then <i>char</i> must be an integer.</p>
format_date()	<code>&lt;?xdoxslt:format_date(./AnyDate,'yyyy-MM-dd','MM/dd/yyyy', \$_XDOLOCALE, \$_XDOTIMEZONE)?&gt;</code>	Reads date in one format and creates in another format.
sysdate()	<code>&lt;?xdoctx:sysdate()?&gt;</code>	<p>Returns the current date and time in XML canonical date format (for example: 1997-07-16T19:20:30.45+01:00). The datatype of the returned value is DATE. The function requires no arguments. See <a href="#">Display the System Date (sysdate) in Reports</a> for information on properly formatting the sysdate in report output.</p>
current_date()	<code>&lt;?xdoxslt:current_date(\$_XDOLOCALE, \$_XDOTIMEZONE)?&gt;</code> Example: <code>&lt;?xdoxslt:current_date('ja-JP', 'Asia/Tokyo')?&gt;</code>	Returns the current date in yyyy-MM-dd format in the given locale and timezone. This function supports only the Gregorian calendar.
current_time()	<code>&lt;?xdoxslt:current_time(\$_XDOLOCALE, \$_XDOTIMEZONE)?&gt;</code> Example: <code>&lt;?xdoxslt:current_time('ja-JP', 'Asia/Tokyo')?&gt;</code>	Returns the current time in the given locale and timezone. This function supports only the Gregorian calendar.
maximum_date()	<code>&lt;?xdoxslt:maximum_date(ELEMENT_NAME)?&gt;</code>	Returns the maximum value of the element in the set. Element should have date value in "yyyy-MM-dd" or "yyyy-MM-dd'T'HH:mm:ss" format. Return value is a number representing the milliseconds since January 1, 1970, 00:00:00 GMT. This number can be converted back to date using the <code>millis_to_date()</code> function.
minimum_date()	<code>&lt;?xdoxslt:minimum_date(ELEMENT_NAME)?&gt;</code>	Returns the minimum value of the element in the set. Element should have date value in "yyyy-MM-dd" or "yyyy-MM-dd'T'HH:mm:ss.ms" format. Return value is a number representing the milliseconds since January 1, 1970, 00:00:00 GMT. This number can be converted back to date using the <code>millis_to_date()</code> function.
millis_to_date()	<code>&lt;?xdoxslt:millis_to_date(number)?&gt;</code>	<p>Translates a date value, which is a number representing the milliseconds since January 1, 1970, 00:00:00 GMT to "yyyy-MM-dd'T'HH:mm:ss.ms+00:00" format. Using the <code>format_date()</code> function, the formatted date value can be further converted to a required date format for display on a report.</p>

SQL Statement or XSL Expression	Usage	Description
date_to_millis()	<?xdoxslt:date_to_millis(date)?>	Translates a date value in "yyyy-MM-dd" or "yyyy-MM-dd'T'HH:mm" format to a number representing the milliseconds since January 1, 1970, 00:00:00 GMT.
minimum()	<?xdoxslt:minimum(ELEMENT_NAME)?>	Returns the minimum value of the element in the set.
date_diff()	<?xdoxslt:date_diff('y', 'YYYY-MM-DD', 'YYYY-MM-DD', \$_XDOLOCALE, \$_XDOTIMEZONE)?>	<p>This function provides a method to get the difference between two dates in the given locale. The dates must be in "yyyy-MM-dd" format. This function supports only the Gregorian calendar. The syntax is as follows: &lt;?xdoxslt:date_diff('format', 'YYYY-MM-DD', 'YYYY-MM-DD', \$_XDOLOCALE, \$_XDOTIMEZONE)?&gt; where format is the time value for which the difference is to be calculated. Valid values are:</p> <ul style="list-style-type: none"> <li>y - for year</li> <li>m - for month</li> <li>w - for week</li> <li>d - for day</li> <li>h - for hour</li> <li>mi - for minute</li> <li>s - for seconds</li> <li>ms - for milliseconds</li> </ul> <p>Example: &lt;?xdoxslt:date_diff('y', '2000-04-08', '2001-05-01', \$_XDOLOCALE, \$_XDOTIMEZONE)?&gt; returns 1</p> <p>Example: &lt;?xdoxslt:date_diff('m', '2001-04-08', '2000-02-01', \$_XDOLOCALE, \$_XDOTIMEZONE)?&gt; returns -14</p> <p>Example: &lt;?xdoxslt:date_diff('d', '2006-04-08', '2006-04-01', \$_XDOLOCALE, 'America/Los_Angeles')?&gt; returns -7</p>
sec_diff()	<?xdoxslt:sec_diff('2000-04-08T20:00:00', '2000-04-08T21:00:00', \$_XDOLOCALE, \$_XDOTIMEZONE)?>	Returns the difference between two dates in seconds in the given locale. The dates must be in "yyyy-MM-dd'T'HH:mm:ss". This function supports only Gregorian calendar. Example: <?xdoxslt:sec_diff('2000-04-08T20:00:00', '2000-04-08T21:00:00', \$_XDOLOCALE, \$_XDOTIMEZONE)?> returns 3600
get_day	<?xdoxslt:get_day('2000-04-08', \$_XDOLOCALE)?>	Returns the day value of a date in yyyy-MM-dd format in the given locale. This function supports only the Gregorian calendar. Example: <?xdoxslt:get_day('2000-04-08', \$_XDOLOCALE)?> returns 8
get_month	<?xdoxslt:get_month('2000-04-08', \$_XDOLOCALE)?>	Returns the month value of a date in yyyy-MM-dd format in the given locale. This function supports only the Gregorian calendar. Example: <?xdoxslt:get_month('2000-04-08', \$_XDOLOCALE)?> returns 4
get_year	<?xdoxslt:get_year('2000-04-08', \$_XDOLOCALE)?>	Returns the year value of a date in yyyy-MM-dd format in the given locale. This function supports only the Gregorian calendar. Example: <?xdoxslt:get_year('2000-04-08', \$_XDOLOCALE)?> returns 2000

SQL Statement or XSL Expression	Usage	Description
month_name	<?xdoxslt:month_name(1, 0, \$_XDOLOCALE)?>	Returns the name of the month in the given locale. This function supports only the Gregorian calendar. The syntax for this function is: <?xdoxslt:month_name( <i>month</i> , [ <i>abbreviate</i> ?], \$_XDOLOCALE)?> where <i>month</i> is the numeric value of the month (January = 1) and [ <i>abbreviate</i> ?] is the value 0 for do not abbreviate or 1 for abbreviate. Example: <?xdoxslt:month_name(12, 1, 'fr-FR')?> returns dec. Example" <?xdoxslt:month_name(1, 0, \$_XDOLOCALE)?> returns January
maximum	<?xdoxslt:maximum(ELEMENT_NAME)?>	Returns the maximum value of the element in the set.
abs	<?xdoxslt:abs(-123.45)?>	Returns the absolute value of the number entered. Example: <?xdoxslt:abs(-123.45)?> Returns: 123.45
chr	<?xdofx:chr( <i>n</i> )?>	Returns the character having the binary equivalent to <i>n</i> in either the database character set or the national character set.
ceil()	<?xdofx:ceil( <i>n</i> )?>	Returns smallest integer greater than or equal to <i>n</i> .
floor()	<?xdofx:floor( <i>n</i> )?>	Returns largest integer equal to or less than <i>n</i> .
round (SQL function)	<?xdofx:round ( <i>number</i> [, <i>integer</i> ] )?>	Returns <i>number</i> rounded to <i>integer</i> places right of the decimal point. If <i>integer</i> is omitted, then <i>number</i> is rounded to 0 places. <i>integer</i> can be negative to round off digits left of the decimal point. <i>integer</i> must be an integer. Example: <?xdofx:round (2.777)?> returns 3 Example: <?xdofx:round (2.777, 2)?> returns 2.78
round (XSLT function)	<?xdoxslt:round ( <i>number</i> [, <i>integer</i> ] )?>	Returns <i>number</i> rounded to <i>integer</i> places right of the decimal point. If <i>integer</i> is omitted, then <i>number</i> is rounded to 0 places. <i>integer</i> can be negative to round off digits left of the decimal point. <i>integer</i> must be an integer. Example: <?xdoxslt:round (2.777)?> returns 3 Example: <?xdoxslt:round (2.777, 2)?> returns 2.78
lower()	<?xdofx:lower (char)?>	Returns <i>char</i> , with all letters lowercase. <i>char</i> can be any of the datatypes CHAR, VARCHAR2, NCHAR, NVARCHAR2, CLOB, or NCLOB. The return value is the same datatype as <i>char</i> .
upper()	<?xdofx:upper(char)?>	Returns <i>char</i> , with all letters uppercase. <i>char</i> can be any of the datatypes CHAR, VARCHAR2, NCHAR, NVARCHAR2, CLOB, or NCLOB. The return value is the same datatype as <i>char</i> .
length	<?xdofx:length(char)?>	Returns the length of <i>char</i> . LENGTH calculates length using characters as defined by the input character set.
greatest	<?xdofx:greatest ( <i>expr</i> [, <i>expr</i> ]... )?>	Returns the greatest of the list of <i>exprs</i> . All <i>exprs</i> after the first are implicitly converted to the datatype of the first <i>expr</i> before the comparison.
least	<?xdofx:least ( <i>expr</i> [, <i>expr</i> ]... )?>	Returns the least of the list of <i>exprs</i> . All <i>exprs</i> after the first are implicitly converted to the datatype of the first <i>expr</i> before the comparison.



SQL Statement or XSL Expression	Usage	Description
next_element	<code>&lt;?xdoxslt:next_element(current-group(),, '&lt;element-name&gt;')?&gt;</code>	Returns the next element in the current group. Returns the element that occurs after the element named. For example: <code>&lt;?xdoxslt:next_element(current-group(),, 'employee')?&gt;</code> returns the element that occurs in the current group after "employee".
prev_element	<code>&lt;?xdoxslt:prev_element(current-group(),,,, '&lt;element-name&gt;')?&gt;</code>	Returns the previous element in the current group. Returns the element that occurs before the element named. For example: <code>&lt;?xdoxslt:prev_element(current-group(),, 'employee')?&gt;</code> returns the element that occurs in the current group before "employee".
set_array	<code>&lt;?xdoxslt:set_array(\$_XDOCTX, '&lt;name of hash table&gt;', n, '&lt;value&gt;')?&gt;</code>	Sets a value in a hash table. Syntax is <code>&lt;?xdoxslt:set_array(\$_XDOCTX, '&lt;name of hash table&gt;', n, '&lt;value&gt;')?&gt;</code> where <code>\$_XDOCTX</code> is required to set the context, <code>&lt;name of hash table&gt;</code> is the name that you supply for your table <code>n</code> is the index of the hash table <code>&lt;value&gt;</code> is the value to set in the hash table. For example: <code>&lt;?xdoxslt:set_array(\$_XDOCTX, 'Employee', 2, 'Jones')?&gt;</code> See <code>get_array</code> below.
get_array	<code>&lt;?xdoxslt:get_array(\$_XDOCTX, '&lt;name of hash table&gt;', n)?&gt;</code>	Returns the value at the specified index of the hash table. Syntax is <code>&lt;?xdoxslt:get_array(\$_XDOCTX, '&lt;name of hash table&gt;', n)?&gt;</code> where <code>\$_XDOCTX</code> is required to set the context, <code>&lt;name of hash table&gt;</code> is the name you supplied for your table in <code>set_array</code> <code>n</code> is the index value of the element you want returned. For example, used in conjunction with the <code>set_array</code> example above, <code>&lt;?xdoxslt:get_array(\$_XDOCTX, 'Employee', 2)?&gt;</code> returns Jones
register_replace_string	<code>&lt;?xdoxslt:register_replace_string(\$_XDOCTX, '&lt;string_to_be_replaced&gt;', '&lt;replacement_string&gt;')?&gt;</code>	Registers the <code>&lt;string_to_be_replaced&gt;</code> with the <code>&lt;replacement_string&gt;</code> . After you register the <code>&lt;replacement_string&gt;</code> , use the <code>normalize_string</code> function to print the <code>&lt;replacement_string&gt;</code> .  For example, if you want to replace 'áâãäåæëèñîíóôöùúûü' string with 'aaaaeeeeiiiiiooooouuu' string and print the replacement string, first use the <code>register_replace_string</code> function and then use the <code>normalize_string</code> function.  1. Register the replacement string. <code>&lt;?xdoxslt:register_replace_string(\$_XDOCTX, 'áâãäåæëèñîíóôöùúûü', 'aaaaeeeeiiiiiooooouuu')?&gt;</code>  2. Print the replacement string. <code>&lt;?xdoxslt:normalize_string(\$_XDOCTX, 'áâãäåæëèñîíóôöùúûü')?&gt;</code>  Output: aaaaaeeeeiiiiiooooouuu

The following table shows supported combination functions.

SQL Statement	Usage
<code>(2+3/4-6*7)/8</code>	<code>&lt;?xdofx:(2+3/4-6*7)/8?&gt;</code>
<code>lpad(substr('1234567890',5,3),10,'^')</code>	<code>&lt;?xdofx:lpad(substr('1234567890',5,3),10,'^')?&gt;</code>
<code>decode('a','b','c','d','e','1')  instr('321',1,1)</code>	<code>&lt;?xdofx:decode('a','b','c','d','e','1')  instr('321',1,1)?&gt;</code>



## Number-To-Word Conversion

This function enables the conversion of numbers to words for RTF template output.

This is a common requirement for check printing.

Syntax of `to_check_number()` function:

```
<?xdo:to_check_number(amount, precisionOrCurrency, caseType, decimalStyle)?>
```

The following table describes the function attributes.

Attribute	Description	Valid Value
amount	The number to be transformed.	Any number
precisionOrCurrency	For this attribute you can specify either the precision, which is the number of digits after the decimal point; or the currency code, which governs the number of digits after the decimal point. The currency code doesn't generate a currency symbol in the output.	An integer, such as 2; or a currency code, such as 'USD'.
caseType	The case type of the output.	Valid values are: 'CASE_UPPER', 'CASE_LOWER', 'CASE_INIT_CAP'
decimalStyle	Output type of the decimal fraction area.	Valid values are: 'DECIMAL_STYLE_FRACTION1', 'DECIMAL_STYLE_FRACTION2', 'DECIMAL_STYLE_WORD'

To print the check number in Indian numbering format, use the `toCheckNumberIN` function instead of `to_check_number`.

The following table displays the example function as entered in an RTF template and the returned output.

RTF Template Entry	Returned Output
<code>&lt;?xdo:to_check_number(12345.67, 2)?&gt;</code>	Twelve thousand three hundred forty-five and 67/100
<code>&lt;?xdo:to_check_number(12345.67, 'USD')?&gt;</code>	Twelve thousand three hundred forty-five and 67/100
<code>&lt;?xdo:to_check_number(12345, 'JPY', 'CASE_UPPER')?&gt;</code>	TWELVE THOUSAND THREE HUNDRED FORTY-FIVE
<code>&lt;?xdo:to_check_number(12345.67, 'EUR', 'CASE_LOWER', 'DECIMAL_STYLE_WORDS')?&gt;</code>	twelve thousand three hundred forty-five and sixty-seven
<code>&lt;?xdo:to_check_number(43526152, 'INR', 'CASE_UPPER', 'DECIMAL_STYLE_WORDS')?&gt;</code>	FORTY-THREE MILLION FIVE HUNDRED TWENTY-SIX THOUSAND ONE HUNDRED FIFTY-TWO
<code>&lt;?xdo:toCheckNumberIN(43526152, 'INR', 'CASE_UPPER', 'DECIMAL_STYLE_WORDS')?&gt;</code>	FOUR CRORES THIRTY FIVE LAKHS TWENTY SIX THOUSAND ONE HUNDRED FIFTY TWO

## XSL Equivalents

Publisher provides syntax equivalent with XSL.

The following table lists the simplified syntax with the XSL equivalents.

Supported XSL Elements	Description	Publisher Syntax
<xsl:value-of select="name">	Placeholder syntax	<?name?>
<xsl:apply-templates select="name">	Applies a template rule to the current element's child nodes.	<?apply:name?>
<xsl:copy-of select="name">	Creates a copy of the current node.	<?copy-of:name?>
<xsl:call-template name="name">	Calls a named template to be inserted into/applied to the current template.	<?call:name?>
<xsl:sort select="name">	Sorts a group of data based on an element in the dataset.	<?sort:name?>
<xsl:for-each select="name">	Loops through the rows of data of a group, used to generate tabular output.	<?for-each:name?>
<xsl:choose>	Used in conjunction with when and otherwise to express multiple conditional tests.	<?choose?>
<xsl:when test="exp">	Used in conjunction with choose and otherwise to express multiple conditional tests	<?when:expression?>
<xsl:otherwise>	Used in conjunction with choose and when to express multiple conditional tests	<?otherwise?>
<xsl:if test="exp">	Used for conditional formatting.	<?if:expression?>
<xsl:template name="name">	Template declaration	<?template:name?>
<xsl:variable name="name">	Local or global variable declaration	<?variable:name?>
<xsl:import href="url">	Import the contents of one stylesheet into another	<?import:url?>
<xsl:include href="url">	Include one stylesheet in another	<?include:url?>
<xsl:stylesheet xmlns:x="url">	Define the root element of a stylesheet	<?namespace:x=url?>

## Use FO Elements

You can use most FO elements in an RTF template inside the Microsoft Word form fields.

The FO elements listed in the following table have been extended for use with Publisher RTF templates. The syntax can be used with either RTF template method.

The full list of FO elements supported by Publisher can be found in the [Supported XSL-FO Elements](#).

FO Element	Publisher Syntax
<fo:page-number-citation ref-id="id">	<?fo:page-number-citation:id?>
<fo:page-number>	<?fo:page-number?>
<fo:ANY NAME WITHOUT ATTRIBUTE>	<?fo:ANY NAME WITHOUT ATTRIBUTE?>



# Design Accessible Reports

This topic describes techniques for designing reports to increase accessibility of report output for users with disabilities.

## Topics:

- [Design for Accessibility](#)
- [Design Accessible Reports Using RTF Templates](#)
- [Design Accessible Reports Using Publisher Layouts](#)

## Design for Accessibility

When creating content for consumption by a wide variety of users, you must plan to provide support for users with various disabilities. Such support is a legal requirement in many locations throughout the world.

You can follow several general guidelines when designing content for consumption by a variety of people with differing abilities. These guidelines apply to any content that you create for Publisher or other applications. You must also be aware of features that are specific to Publisher that ensure that the content that you provide supports accessibility requirements.

This section contains the following topics on designing for accessibility:

- [Obtain General Information](#)
- [Avoid Common Misconceptions](#)
- [Follow General Guidelines for Accessible Content](#)
- [Use the Template Builder to Verify Report Accessibility](#)

## Obtain General Information

You can locate information about accessibility across the Information Technology industry in numerous published books.

This guide doesn't intend to duplicate those works. Various standards and legislation are documented, especially as part of the World Wide Web Consortium (W3C) and Section 508 of the United States Rehabilitation Act.

## Avoid Common Misconceptions

Many designers make assumptions about technology and accessibility. Some of the more common misconceptions are listed in this section.

- HTML content automatically equals accessible content.
- Accessible tools automatically create accessible content.
- Automated testing tools can reliably determine accessibility.

None of these assumptions is correct. Developers can create non-accessible content using HTML. A tool that can produce accessible content might not do so by default, or might allow a developer to select options that turn off the accessible features within existing accessible content. Automated testing tools do not always interact with content the same way that end users do. As a result, the tools can erroneously report accessible elements as non-accessible. Therefore, accessibility is ultimately the responsibility of the content designer. When creating content, designers must be aware of certain common practices to ensure the content is accessible to all users.

## Follow General Guidelines for Accessible Content

Always consider the fact that multiple disabilities exist and that multiple disabilities might manifest in the same individual. You must also remember that there're varying degrees of certain disabilities (such as the various types of color vision deficiency). Your designs must take all these possibilities into account.

This section contains guidelines on the following general areas of design:

- ["Color Selection"](#)
- ["Color Contrast"](#)
- ["Font Selection"](#)

### Color Selection

Many different types of color vision deficiency exist, from an inability to see the difference between one common color pair such as red-green (the most common deficiency), all the way to full color blindness where a person can see only varying shades of gray and black. Using only color to convey critical information means that certain users are not fully aware of all the pertinent information about a subject. And, of course, a blind user needs any information conveyed by color to also be present in an alternate textual format.

As a developer, you must not create any content that provides key information by color alone. One example of a non-accessible design is to denote negative numbers solely by coloring the text red. Another example is a typical "stoplight" indicator where the only context information comes from its color — green for good and red for bad.

### Use Color with Text

You can use color in designs if you also include another indication of the same information.

For example, you can include a minus sign or parentheses to denote negative numbers in tables and pivots. For stoplight displays, you can add descriptive text or different shaped icons in addition to the color. You can include text such as "Status: good." You can include green circles for "good," yellow triangles for "warning," and red octagons for "bad."

### Color Contrast

Because color vision deficiency can also manifest as an inability to distinguish between subtle shades of similar colors, overall color design of all screen elements must provide a large amount of contrast.

You should strive to achieve a minimum of a 4.5:1 color luminosity contrast ratio. For example, use black text on a white background instead of dark gray text on a light gray background.

## Font Selection

Users with low visual acuity often use screen magnification software to make the screen easier to read. The fonts that you use should be readable even when magnified by accessibility tools by as much as 20 times.

Some fonts do not display well when magnified, while others do. For example, the Tahoma font magnifies well.

## Use the Template Builder to Verify Report Accessibility

You use the Template Builder for Word to create RTF templates that can generate reports with accessibility features.

The Template Builder also provides an accessibility checker to review the template for features that enhance the accessibility of the report for report consumers who may need assistive technologies to view the report.

For more information, see [Check Accessibility](#).

## Design Accessible Reports Using RTF Templates

This section describes the following techniques for designing reports using RTF templates.

- [Avoid Nested Tables or Separated Tables](#)
- [Define a Document Title](#)
- [Define Alternative Text for an Image](#)
- [Define a Table Summary](#)
- [Define a Table Column Header](#)
- [Define a Table Row Header](#)
- [Define a Layout Table](#)
- [Sample Supported Tables](#)

## Avoid Nested Tables or Separated Tables

Avoid using nested tables in a report. For a complex report, try breaking down complex tables into several simple, straightforward tables.

The following figure shows a simple table.

Header1	Header2	Header3

The following figure shows an example of a nested table: A table is inserted inside a table-cell.

Column Header1	Column Header2	Column Header3
	Cell with inserted table	
	Nested table	

## Examples

These are examples of table structures that Publisher does and doesn't support for accessibility.

### Nested Tables

Publisher doesn't support accessibility when nested tables are used in a report.

In the following illustration, Publisher can't tell to which column data "C1R1data" belongs.

	Column header 1	Column Header2
Row Header1	C1R1data	C2R1data
	C1R2data	C2R2data

Remove the nested table as shown in the following illustration.

	Column header 1	Column Header2
Row Header1	C1R1data	C2R1data
	C1R2data	C2R2data

## Table Headers Must Not Be Separated from the Table Body

To ensure accessibility, table headers must be part of the table they belong to.

The example shown in the following illustration isn't supported because the header, table body and accessibility fields exist in three different tables.

	Column Header 1	Column Header 2	Column Header 3
UC1			
Row Header 1	C1R1Data	C2R1Data	C3R1Data
Row Header 2	C1R2Data	C2R2Data	C3R2Data
UC2			
Subtotal	Total 1	Total 2	

These three tables should be joined into one to support accessibility, as shown in the following illustration.

ACC	Column Header 1	Column Header 2	Column Header 3
UC1Row Header 1	C1R1Data	C2R1Data	C3R1Data
Row Header 2	C1R2Data	C2R2Data	C3R2DataUC2
Subtotal	Total 1	Total 2	

## Define a Document Title

You can define a document title. The procedure differs slightly depending on the version of Microsoft Word.

To define a document title in Microsoft Word 2007:

1. Click **Office** and click **Prepare**.
2. Click **Properties** and define the title.

## Define Alternative Text for an Image

You can define alternative text for an image in the template.

To define alternative text for an image:

1. Right-click the image.
2. On the menu, click **Format Picture**.
3. On the **Alt Text** tab, enter alt: followed by the alternative text and end with a semicolon.

For example,

alt:flower picture;

## Define a Table Summary

Add a table summary to a table by inserting this command.

```
<?table-summary: 'My Table Test '?>
```

in the first column and first row position of the table.

## Define a Table Column Header

You can define a table column header. The procedure differs slightly depending on the version of Microsoft Word.

To define a table column header:

1. Select the heading row or rows. The selection must include the first row of the table.
2. On the **Design** tab, in the **Table Style Options** group, select **Header Row**.



3. Right-click the table and select **Table Properties**.
4. In the Table Properties dialog, click the **Row** tab and then select Repeat as Header row at the top of each page.

## Define a Table Row Header

To define multiple row headers, use the Publisher command.

<?acc-row-header:col\_index?>

Example Usage:

<?acc-row-header:'1,2,4'?> ==> column 1, 2 and 4 will be row-headers.

<?acc-row-header:'1,4'?> ==> column 1 and 4 will be row-headers.

In the following figure, the code behind the ACC field is:

ACC Field=<?table-summary:'My Table Test '?><?acc-row-header:'1,2'?>

which defines the first two columns as row headers.

<b>ACC</b>		Column header 1a	Column header 1b	
		Column header 2a	Column header 2b	Column Header 2c
Row header 1a	Row header 2a	Data col 1 row 1	Data col 2 row 1	Data col 3 row 1
Row header 1b	Row header 2b	Data col 1 row 2	Data col 2 row 2	Data col 3 row 2
	Row header 2c	Data col 1 row 3	Data col 2 row 3	Data col 3 row 3

## Sample Supported Tables

The following illustrations display sample tables for which accessibility is supported.

<b>ACC</b>		Column header 1a	Column header 1b	
		Column header 2a	Column header 2b	Column Header 2c
Row header 1a	Row header 2a	Data col 1 row 1	Data col 2 row 1	Data col 3 row 1
Row header 1b	Row header 2b	Data col 1 row 2	Data col 2 row 2	Data col 3 row 2
	Row header 2c	Data col 1 row 3	Data col 2 row 3	Data col 3 row 3

ACC		Column header 1a	Column header 1b	Column header 1c	Column Header 1d
		Column header 2a	Column header 2b	Column header 2c	Column Header 2d
Row header 1a	Row header 2a	Data col 1 row 1	Data col 2 row 1	Data col 3 row 1	Data col 4 row 1
	Row header 2b	Data col 1 row 2	Data col 2 row 2	Data col 3 row 2	Data col 4 row 2
	Row header 2c	Data col 1 row 3	Data col 2 row 3	Data col 3 row 3	Data col 4 row 3
	Summary Sub-Total			Total 1a	Total 2a
Row header 1b	Row header 2d	Data col 1 row 1	Data col 2 row 1	Data col 3 row 1	Data col 4 row 1
	Row header 2e	Data col 1 row 2	Data col 2 row 2	Data col 3 row 2	Data col 4 row 2
	Summary Sub-Total			Total 1b	Total 2b
Grant Total				Grand-total	Grand-total

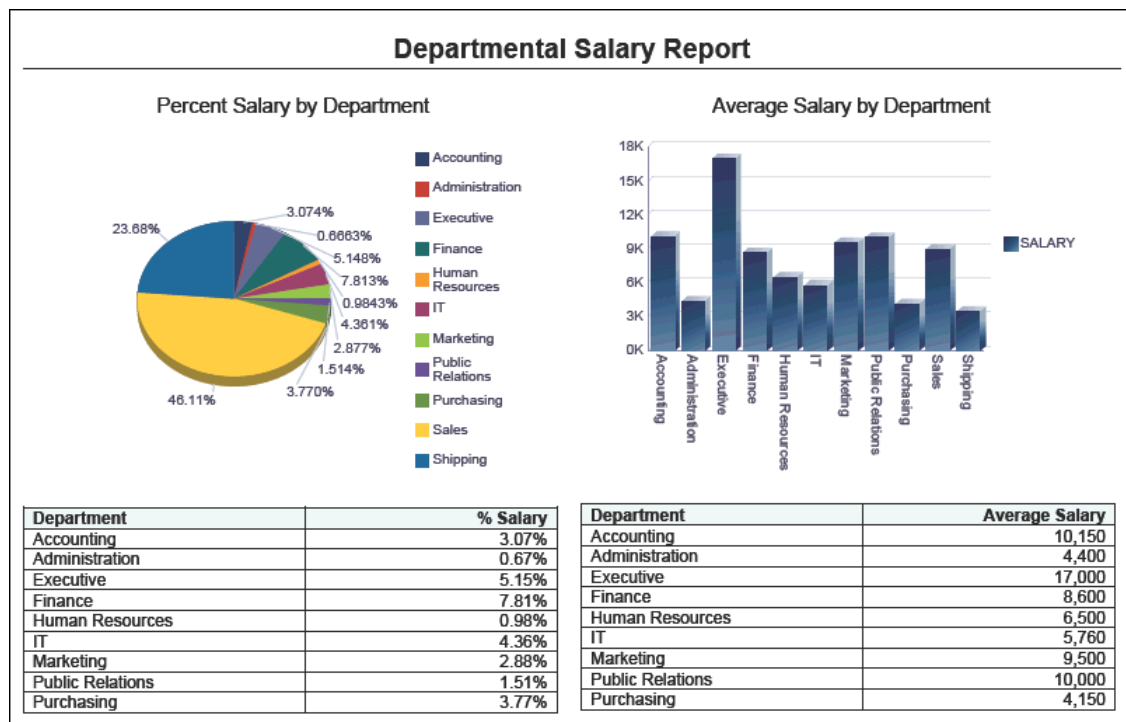
ACC Paramaters Table			
Row header 1a	Data col 1 row 1	HA	Data col 3 row 1
Row header 1b	Data col 1 row 2	HB	Data col 3 row 2
Row header 1c	Data col 1 row 3	HC	Data col 3 row 3

ACC Paramaters Table	Column header 1a		Column Header 1c
Row header 1a	Data col 1 row 1	HA	Data col 3 row 1
Row header 1b	Data col 1 row 2	HB	Data col 3 row 2
Row header 1c	Data col 1 row 3	HC	Data col 3 row 3

## Convert Charts to Tables

Charts and gauges aren't readable by the visually impaired. In order to make report output accessible for visually impaired users, create a table or cross tab that summarizes the data in the table.

The following figure shows the summarized data in the table. Avoid providing a large table of detail data that isn't summarized appropriately.



## Design Accessible Reports Using Publisher Layouts

This section describes the following techniques for designing accessible reports using the Publisher layout editor.

- [Define Document Titles](#)
- [Define Alternative Text for Images](#)
- [Define Summary Text for Tables](#)
- [Define Table Row Headers](#)
- [Define Text Header Levels](#)

### Define Document Titles

You define the title of a report at the same time as you save the report layout. You can also rename the report at a later time.

### Define Alternative Text for Images

You can define alternative text for images so that they're describable in accessibility mode.

To define alternative text for an image:

1. Select an image such as a chart.
2. On the **Properties** pane, expand **Misc**.
3. In the **Alternative Text** property, enter the alternative text for the image.

## Define Summary Text for Tables

You can define a text summary to describe a table within a report.

To define summary table text:

1. Select a table.
2. On the **Properties** pane, expand **Misc**.
3. In the **Summary** property, enter the table summary text.

## Define Table Row Headers

Table row headers summarize each row in a table. The layout editor automatically includes table row headers on all inserted tables. No further action is required.

## Define Text Header Levels

You can define text header levels to specify structures within a report.

To define text header levels:

1. Select a text item.
2. On the **Properties** pane, expand **Misc**.
3. In the **Header Level** property, select a value 1 to 6.

## Define a Layout Table

You can use layout tables to present information in columns and rows and arrange content without using headers and a table summary.

Use a layout table when you don't need column headers, row headers, IDs, table summary, and other semantics used by a data table. When you've enabled accessibility mode, if you leave the value of the summary property empty or if you set `<?table-summary:?>` in a table, Publisher sets `role="presentation"` for that table, and specifies that table as a layout table in the HTML output.

To define a layout table:

1. Select a table.
2. On the **Properties** pane, expand **Misc**.
3. In the **Summary** property, make sure the value is empty.

# Supported XSL-FO Elements

This topic lists the XSL-FO elements that are supported by Publisher in RTF templates.

- [Supported XSL-FO Elements](#)

## Supported XSL-FO Elements

The following table lists the XSL-FO elements supported in this release.

For each element the supported content elements and attributes are listed. If elements have shared supported attributes, these are noted as a group and are listed in the subsequent table, Property Groups. For example, several elements share the content element "inline." Rather than list the inline properties each time, each entry notes that "inline-properties" are supported. The list of inline-properties can then be found in the Property Groups table.

Element	Supported Content Elements	Supported Attributes
basic-link	external-graphic	inline-properties
	inline	external-destination
	leader	internal-destination
	page-number	
	page-number-citation	
	basic-link	
	block	
	block-container	
	table	
	list-block	
	wrapper	
	marker	
	retrieve-marker	
bidi-override	bidi-override	inline-properties
	external-graphic	
	instream-foreign-object	
	inline	
	leader	
	page-number	
	page-number-citation	
	basic-link	

Element	Supported Content Elements	Supported Attributes
block	external-graphic inline page-number page-number-citation basic-link block block-container table list-block wrapper	block-properties
block-container	block block-container table list-block wrapper	block-properties
bookmark-tree	bookmark	N/A
bookmark	bookmark bookmark-title	external-destination internal-destination starting-state
bookmark-title	N/A	color font-style font-weight
conditional-page-master-reference	N/A	master-reference page-position <ul style="list-style-type: none"> <li>• first</li> <li>• last</li> <li>• rest</li> <li>• any</li> <li>• inherit</li> </ul> odd-or-even <ul style="list-style-type: none"> <li>• odd</li> <li>• even</li> <li>• any</li> <li>• inherit</li> </ul> blank-or-not-blank <ul style="list-style-type: none"> <li>• blank</li> <li>• not-blank</li> <li>• any</li> <li>• inherit</li> </ul>
external-graphic	N/A	graphic-properties src
flow	block block-container table list-block wrapper	flow-properties

Element	Supported Content Elements	Supported Attributes
inline	external-graphic inline leader page-number page-number-citation basic-link block block-container table wrapper	inline-properties
instream-foreign-object	N/A	graphic-properties
layout-master-set	page-sequence-master simple-page-master simple-page-master page-sequence-master	N/A
leader	N/A	inline-properties
list-block	list-item	block-properties
list-item	list-item-label list-item-body	block-properties
list-item-body	block block-container table list-block wrapper	block-properties
list-item-label	block block-container table list-block wrapper	block-properties
page-number	N/A	empty-inline-properties
page-number-citation	N/A	empty-inline-properties ref-id
page-sequence	static-content flow	inheritable-properties id master-reference initial-page-number <ul style="list-style-type: none"> <li>• auto</li> <li>• &lt;page-number&gt;</li> </ul> force-page-count <ul style="list-style-type: none"> <li>• auto</li> <li>• end-on-even</li> <li>• end-on-odd</li> <li>• end-on-even-layout</li> <li>• end-on-odd-layout</li> <li>• no-force</li> <li>• inherit</li> </ul> format

Element	Supported Content Elements	Supported Attributes
page-sequence-master	single-page-master-reference repeatable-page-master-reference repeatable-page-master-alternatives	master-name
region-after	N/A	side-region-properties
region-before	N/A	side-region-properties
region-body	N/A	region-properties margin-properties-CSS column-count
region-end	N/A	side-region-properties
region-start	N/A	side-region-properties
repeatable-page-master-alternatives	conditional-page-master-reference	maximum-repeats
repeatable-page-master-reference	N/A	master-reference maximum-repeats
root	bookmark-tree layout-master-set page-sequence	inheritable-properties
simple-page-master	region-body region-before region-after region-start region-end	margin-properties-CSS master-name page-height page-width reference-orientation <ul style="list-style-type: none"> <li>• 0</li> <li>• 90</li> <li>• 180</li> <li>• 270</li> <li>• -90</li> <li>• -180</li> <li>• -270</li> <li>• 0deg</li> <li>• 90deg</li> <li>• 180deg</li> <li>• 270deg</li> <li>• -90deg</li> <li>• -180deg</li> <li>• -270deg</li> <li>• inherit</li> </ul> writing-mode <ul style="list-style-type: none"> <li>• lr-tb</li> </ul>
single-page-master-reference	N/A	master-reference
static-content	block block-container table wrapper	flow-properties



Element	Supported Content Elements	Supported Attributes
table	table-column table-header table-footer table-body	block-properties
table-body	table-row	inheritable-properties id
table-cell	block block-container table list-block wrapper	block-properties number-columns-spanned number-rows-spanned
table-column	N/A	inheritable-properties column-number column-width number-columns-repeated
table-footer	table-row	inheritable-properties id
table-header	table-row	inheritable-properties id
table-row	table-cell	inheritable-properties id
wrapper	inline page-number page-number-citation basic-link block block-container table wrapper	inheritable-properties id

## Property Groups Table

These properties support XSL-FO elements.

The following table lists the supported properties belonging to the attribute groups defined in [Supported XSL-FO Elements](#).

Property Group	Properties
area-properties	clip overflow (visible, hidden) reference-orientation <ul style="list-style-type: none"><li>• 0</li><li>• 90</li><li>• 180</li><li>• 270</li><li>• -90</li><li>• -180</li><li>• -270</li><li>• 0deg</li><li>• 90deg</li><li>• 180deg</li><li>• 270deg</li><li>• -90deg</li><li>• -180deg</li><li>• -270deg</li><li>• inherit</li></ul> writing-mode (lr-tb, rl-tb, lr, rl) baseline-shift (baseline, sub, super) vertical-align
block-properties	inheritable-properties id

Property Group	Properties
border-padding-background-properties	background-color background-image background-position-vertical background-position-horizontal border border-after-color border-after-style (none, dotted, dashed, solid, double) border-after-width border-before-color border-before-style (none, solid) border-before-width border-bottom border-bottom-color border-bottom-style (none, dotted, dashed, solid, double) border-bottom-width border-color border-end-color border-end-style (none, dotted, dashed, solid, double) border-end-width border-left border-left-color border-left-style (none, dotted, dashed, solid, double) border-left-width border-right border-right-color border-right-style (none, dotted, dashed, solid, double) border-right-width border-start-color border-start-style (none, dotted, dashed, solid, double) border-start-width border-top border-top-color border-top-style (none, dotted, dashed, solid, double) border-top-width border-width padding padding-after padding-before padding-bottom padding-end padding-left padding-right padding-start padding-top
box-size-properties	height width

Property Group	Properties
character-properties	font-properties text-decoration
empty-inline-properties	character-properties border-padding-background-properties id color
flow-properties	inheritable-properties id flow-name
font-properties	font-family font-size font-style (normal, italic, oblique) font-weight (normal, bold) table-omit-header-at-break (TRUE, FALSE, inherit) table-omit-footer-at-break (TRUE, FALSE, inherit)
graphic-properties	border-padding-background-properties margin-properties-inline box-size-properties font-properties keeps-and-breaks-properties-atomic id
inheritable-properties	border-padding-background-properties box-size-properties margin-properties-inline area-properties character-properties line-related-properties leader-properties keeps-and-breaks-properties-block color absolute-position <ul style="list-style-type: none"> <li>• auto</li> <li>• absolute</li> <li>• fixed</li> <li>• inherit</li> </ul>
inline-properties	inheritable-properties id
keeps-and-breaks-properties-atomic	break-after (auto, column, page) break-before (auto, column) keep-with-next keep-with-next.within-page
keeps-and-breaks-properties-block	keeps-and-breaks-properties-inline

Property Group	Properties
keeps-and-breaks-properties-inline	keeps-and-breaks-properties-atomic keep-together keep-together.within-line keep-together.within-column keep-together.within-page
leader-properties	leader-pattern (rule, dots) leader-length leader-length.optimum (dotted, dashed, solid, double) rule-thickness
line-related-properties	text-align (start, center, end, justify, left, right, inherit) text-align-last (start, center, end, justify, left, right, inherit) text-indent linefeed-treatment (ignore, preserve, treat-as-space, treat-as-zero-width-space, inherit ) white-space-treatment (ignore, preserve, ignore-if-before-linefeed, ignore-if-after-linefeed, ignore-if-surrounding-linefeed, inherit) white-space-collapse (FALSE, TRUE, inherit) wrap-option (no-wrap, wrap, inherit) direction (ltr)
margin-properties-block	margin-properties-CSS space-after space-after.optimum space-before space-before.optimum start-indent end-indent
margin-properties-CSS	margin margin-bottom margin-left margin-right margin-top
margin-properties-inline	margin-properties-block space-start space-start.optimum space-end space-end.optimum position <ul style="list-style-type: none"> <li>• static</li> <li>• relative</li> <li>• absolute</li> <li>• fixed</li> <li>• inherit</li> </ul> top left

Property Group	Properties
region-properties	border-padding-background-properties area-properties region-name
side-region-properties	region-properties extent

# Generate PDF/A and PDF/X Output

This topic describes how to generate PDF/A and PDF/X output from Publisher.

## Topics:

- [Generate PDF/A Output](#)
- [Generate PDF/X output](#)

## Generate PDF/A Output

PDF/A is a variation of PDF file format designed for the long-term archiving of electronic documents.

Some governments and standards organizations require PDF/A to ensure preservation of documents. A PDF/A file is a PDF file viewable by PDF viewers such as Adobe Reader, but the PDF/A file must follow additional requirements specified in the ISO standard. These requirements specify both required objects and features not supported for long-term archiving.

You can generate the PDF/A-1A, PDF/A-1B, PDF/A-2A, PDF/A-2B, PDF/A-3A, or PDF/A-3B variation of the PDF/A standard. In the PDF/A version property, specify the PDF/A version you want to use and then specify PDF/A output for the report.

## Requirements and Limitations

PDF/A output has specified requirements and limitations.

Limitations and requirements for generating PDF/A output:

- **Supported template types:** RTF, FO, XPT, and XSL.
- **Font requirements:** By default, all fonts in the template are replaced with Go Noto fonts in the output. To use a different font in the output, specify the font mappings in the report configuration.
- **PDF features not supported in PDF/A documents:**
  - All audio and video content, including Flash embedding
  - Transparency (transparent colors render as opaque). Use PDF/A-2B to support transparency.
  - Encryption
- **Reprocessing by utilities isn't supported:** Reprocessing PDF/A file using the PDFBookBinder, PDFDocMerger, or PDFSignature (digital signature) utilities isn't supported. The reprocessed PDF file may lose conformance to the PDF/A standard.
- **Required report configuration properties:** The report run-time properties must be set as shown in the following table.

Property	Required Setting
Enable PDF Security (pdf-security)	Must be set to false
Encryption Level (pdf-encryption-level)	Must be set to 0

Formatting properties specific to PDF/A output can be set in the Report Properties dialog. For more information, see [PDF/A Output Properties](#).

## Additional Resources

For more information about the PDF/A standard, refer to the Adobe website. Refer also to the iso.org website for articles 'Use of PDF 1.4 (PDF/A-1)' and 'Addendum Cor 1:2007'.

## Generate PDF/X output

PDF/X is a collection of ISO standards that defines methods for the exchange of digital graphic data using PDF to ensure predictable and consistent printing in a professional print environment.

A PDF/X document is a PDF file viewable by PDF readers such as Adobe Reader, but it follows an additional set of rules defined by the ISO specifications. These rules specify both required objects and features not supported for graphics exchange. The PDF/X standard follows strict rules in color management. Publisher supports the PDF/X-1a:2003 variation of the PDF/X standard.

## Prerequisites

The generation of PDF/X output requires that you obtain the International Color Consortium (ICC) profile data file and place it under `<bi publisher repository>/Admin/Configuration`.

The ICC profile is a binary file describing the color characteristics of the intended output device. For production environments, the color profile may be provided by your print vendor or by the printing company that prints the generated PDF/X file. An example of an ICC profile data file is: CoatedFOGRA27.icc.

Profile data is also available from Adobe or [colormangement.org](http://colormangement.org).

## Requirements and Limitations

PDF/X output has specified requirements and limitations.

The following lists limitations of and requirements for generating PDF/X output:

- Supported template types: The following template types support the generation of PDF/X: RTF, FO, XPT, and XSL. There're no additional template requirements to generate PDF/X.
- Color requirements: The color data in the template (text color, images, and SVG) is stored as RGB data, but at the time the PDF/X file is generated, the color data is converted to CMYK using an ICC profile that you must provide to Publisher. Specify the ICC profile using the PDF/X ICC Profile Data property. See the following table.
- PDF features not supported in PDF/X documents:
  - Transparency (transparent colors render as opaque)
  - Encryption



- Font requirements: By default, all fonts are replaced with Go Noto fonts. To use a different font in the output, specify the font mappings in the report configuration.
- Reprocessing by Publisher utilities isn't supported: Reprocessing of the PDF/X file using the Publisher utilities PDFBookBinder, PDFDocMerger, or PDFSignature isn't supported. The reprocessed file becomes a regular PDF file and may lose conformance to the PDF/X standard.
- Required report configuration properties: The report run-time properties must be set as shown in the following table.

Property	Required Setting
Enable PDF Security (pdf-security)	Must be set to false.
Encryption Level (pdf-encryption-level)	Must be set to 0.

Formatting properties specific to PDF/X output can be set in the Report Properties dialog. Of the formatting properties, the following two are required:

Property	Description	Valid Values
PDF/X ICC Profile Data	The name of the ICC profile data file placed under <Publisher repository>/Admin/Configuration.	ICC profile data file name, for example: CoatedFOGRA27.icc
PDF/X output condition identifier	The name of one of the standard printing conditions registered with ICC. The list of standard CMYK printing conditions to use with PDF/X-1a is provided on the ICC website.	A valid "Reference name," for example: FOGRA43

For more information, see [PDF/X Output Properties](#).

## Additional Resources

For more information about the PDF/X standard, refer to the Adobe website and the iso.org website.

Refer to these documents:

- Application Notes for PDF/X Standards prepared by the Committee for Graphic Arts Technologies Standards.
- ISO 15930-4:2003 Graphic technology - Prepress digital data exchange using PDF - Part 4: Complete exchange of CMYK and spot color printing data using PDF 1.4 (PDF/X-1a) published in iso.org website.

# Generate Accessible PDF Output

An accessible PDF output is a structured document that includes a document title and the PDF tags. The paragraph, link, image, table, and list elements are tagged in accessible PDF documents.

## Prerequisites

Set the property for generating accessible PDF output at the report-level for specific reports or at the global level for all PDF outputs. See [Configure Accessible PDF Output for Reports](#).

## Requirements and Limitations

Element	Requirements	Limitations
Text	Format the text using heading styles such as heading1, heading2, and heading3.	Don't justify text because screen readers might not correctly find the spaces between words when the line is justified.
Table	Tables must have headers. The PDF/UA standard recommends adding the headers. Adobe Acrobat reports a table without header as an error.  If you add a table summary, the summary will be added as a table attribute in PDF documents. However, the PDF/UA format doesn't require a summary.	Don't use a table for layout purpose. Whether a table is used as a data table or as a layout table, all tables are tagged as tables.  Don't use colspan or rowspan. The PDF/UA format allows spans, but Acrobat reports tables with spans as an error (irregular table).
Image	Add alternate text to every image.	NA
Document	Create bookmarks when you expect the output to contain more than 21 pages. The PDF/UA format doesn't require bookmarks, but Acrobat reports a large document without bookmarks as an error.  Add the document title. You can add a title in the template, or you can set the title using the pdf-document-title runtime parameter.	NA
Header and footer	Use headers and footers only for providing the pagination information.	Don't include any information apart from the page numbers in the header/footer section. The headers and footers are marked as "Artifacts" and these artifacts aren't read by the screen readers as per the ISO 14289 7.4 standard.
Static content	NA	Don't include a table, list, or link element in the static content. The entire static content area will be tagged as a single paragraph.

Element	Requirements	Limitations
Graphics	NA	Don't use the Word Shape feature of RTF in the RTF template. Some of the Word Shape objects marked as artifacts instead of figures can't be read by the screen readers.
Font	Map the Symbol font to a TrueType font to avoid the usage of the Adobe core symbol font in the output.	Don't use the Dingbat font because there's no equivalent TrueType font. The Adobe accessibility checker displays a warning message when you use fonts that don't have encoding parameters.

PDF/UA-1 (ISO 14289-1:2014) is a standard for universal accessibility. The PDF/UA format requires all the fonts used in the output to be embedded in the document. Hence, the PDF/UA formatted report output might look different from the original report and the file size of the PDF/UA formatted output might be more than the original report.

If you select PDF/UA as the output format or if you change the **Use PDF/UA format for accessible PDF output** runtime property to true, and generate PDF in accessible mode, the look and feel of the report output might be different from the PDF output from the same template, because the PDF standard fonts such as Helvetica, Courier, and Times available with PDF viewers aren't used. Publisher doesn't load the Type1 font for PDF/UA, PDF/A, and PDF/X.

## Configure Accessible PDF Output for Reports

You can configure all reports or specific reports to generate accessible PDF output.

To configure accessible PDF output for reports, choose one of these methods:

- Configure the report property to make the PDF output of a report accessible.
  1. Navigate to the report in the catalog.
  2. Click **Edit** to launch the Report Editor.
  3. Click **Properties** to open the Report Properties dialog.
  4. Click the **Formatting** tab and scroll down.
  5. Set the **Make PDF output accessible** property to true.

- Configure the output format to make the PDF output of a report accessible.
  1. Navigate to the report in the catalog.
  2. Click **Edit** to launch the Report Editor.
  3. Click **View a List** and select **PDF/UA** from the **Output Formats** list.

You can select PDF/UA output format when you view the report in Online viewer or when you schedule a report.

- Make the PDF outputs of all online reports and scheduled reports accessible.
  1. On the Administration page, under Runtime Configuration, select **Properties**.
  2. Set the **Make PDF output accessible** property to true.

# Generate CSV Output

This topic describes how to generate a CSV output for large reports.

To output a report that includes millions of rows, select to output the report only in CSV format. When you select only CSV format for the output of a large report, the data processor directly generates the CSV output without generating an XML file, which reduces the likelihood of out-of-memory issues.

## Requirements

To generate the CSV output for a large volume of data, make sure you:

- Create a dataset using SQL query.
- Set the **Enable CSV Output** property in the Data Model Properties page.
- Select only the **Data (CSV)** output format for the report.
- Deselect the **Auto Run** and **Run Report Online** options for the report.
- Deselect the **Save Data for Republishing** option in the Output tab, if you are scheduling the report.

## Limitations

The data engine cannot generate a CSV output when:

- You can't use a template to format the CSV output.  
Reports in CSV format are directly generated from the data models. The CSV output contains carriage return and line feed characters at the end of each line.
- The SQL query contains the CLOB/BLOB columns  
When a query includes CLOB columns, the data processor cannot generate the CSV output because the LOB might be XML data or non-structured data. Converting the LOB columns to flatten a CSV format doesn't scale. This type of conversion requires complex code changes that are similar to embedding a formatting engine inside the data engine.
- Data model has a complex parent-child dataset hierarchy with multiple groups  
When a data model has multiple datasets with complex parent - child links, the data engine cannot generate CSV output.
- The SQL query contains the DFF/EFF columns  
When a query includes DFF (Descriptive Flexfield) or EFF (Extensible Flexfield) columns, the data processor cannot generate a CSV output. Each DFF or EFF column is treated as a nested sub-group in the query, which results in nested XML data. You can't directly flatten nested XML data to a CSV file.
- The data model has both SQL and Non-SQL datasets  
When a data model contains a mix of SQL and Non-SQL datasets (Non-Standard datasets such as web service, HTTP, and XML), the data processor cannot generate a CSV output.
- The data model has a non-standard SQL query

When a data model has a non-standard query such as a procedure or a function that returns a reference, the data processor cannot directly generate a CSV output. The non-standard queries returning nested XML structure can't be handled inside the data engine.

- The scheduled report has multiple output formats

If you select multiple output formats for the scheduled report, the data processor doesn't generate the CSV output.

- The scheduled report uses bursting

Splitting and delivering data requires raw XML data. The data engine can't generate the CSV format for bursting reports.

## Extract a Large Volume of Data

You can use Publisher reports to extract a large volume of data and generate a CSV output.

1. Create a data model with a single SQL Query type dataset.

- a. If you have multiple queries, combine all the queries into a single query using the **WITH** clause.

For example. If you have these Q1, Q2, and Q3 datasets:

Q1 dataset : SELECT DEPARTMENT\_ID, DEPARTMENT\_NAME, LOCATION FROM DEPARTMENTS

Q2 dataset: SELECT EMPLOYEE\_ID, FIRST\_NAME, LAST\_NAME, JOB, SALARY FROM EMPLOYEES

Q3-dataset: SELECT JOB\_ID, MAX\_SALARY, MIN\_SALARY FROM JOBS

Q3 dataset: SELECT JOB\_ID, MAX\_SALARY, MIN\_SALARY FROM JOBS

Instead of linking the Q1, Q2, and Q3 datasets to form a parent-child hierarchy, create a single dataset combining the queries of Q1, Q2, and Q3 datasets as shown below:

WITH Q1 AS(SELECT DEPARTMENT\_ID, DEPARTMENT\_NAME, LOCATION FROM DEPARTMENTS),

Q2 AS (SELECT EMPLOYEE\_ID, FIRST\_NAME, JOB\_ID AS EMP\_JOB\_ID, SALARY FROM EMPLOYEES),

Q3 AS(SELECT JOB\_ID, MAX\_SALARY, MIN\_SALARY FROM JOBS)

SELECT Q1.\*, Q2.\*, Q3.\* FROM Q1, Q2, Q3

- b. Click **View Data**.
  - c. Click **Save As Sample Data**.
2. Edit the data model properties to select the **Enable CSV Output** option.
  3. Save the data model.
  4. Create a report based on the data model.
  5. Edit the report properties and deselect the **Auto Run** and **Run Report Online** options.  
If you run the report online, you might encounter performance issues while the large volume of data is processed.
  6. Click **View a list** and select only the **Data (CSV)** output format for the report.
  7. Save the report.
  8. Schedule the report.  
Make sure you deselect the **Save Data for Republishing** option in the Output tab.
  9. Submit the job to extract data.

10. After the report job completes successfully, download the output from the **Report Job History** page.

# PDF Version Support

This topic describes BI Publisher's support for PDF specification 1.7 in its processing utilities.

## Topics:

- [About PDF Version Support](#)
- [Supported Utilities](#)
- [Limitations](#)

## About PDF Version Support

The output PDF version is based on the input PDF version.

The input PDF version defines the output PDF version as follows:

- PDF version 1.4 and earlier generates PDF 1.4
- PDF version 1.5 and later generates the same output version as the input version

## Supported Utilities

Several utilities support PDF documents and templates.

The utilities that support PDF 1.7 are:

- FormProcessor – merges a PDF template with XML data to produce PDF document output.
- PDFDocMerger – provides optional processing of PDF files to merge documents, add page numbering, and set watermarks.
- PDFSignature – creates signed PDF documents by processing unsigned PDF documents with a signature field name and a password-protected Personal Information Exchange (PFX) file.

## Limitations

This section describes the limitations of Publisher's support for the PDF 1.7 standard.

It includes the following topics:

- [Limitations That Apply to All PDF Utilities](#)
- [FormProcessor Limitations](#)
- [PDFDocMerger and PDFBookBinder Limitations](#)
- [PDFSignature Limitations](#)

## Limitations That Apply to All PDF Utilities

PDF utilities have limited functionality in Publisher.

Limitations that apply to all the Publisher PDF utilities are:

- Secured PDF documents can't be used as input to any Publisher PDF utility.
- PDF documents generated by Publisher do not support most accessibility features.
- Unicode passwords are not supported.
- PDF utilities may not work properly with input PDFs that contain 3-D artwork and input PDF documents formatted as a presentation (slideshow).

## FormProcessor Limitations

Limitations that apply to the FormProcessor utility are listed in this section.

- XFA Forms (Adobe's XML Forms Architecture) isn't supported.
- Portable collection (portfolio) isn't supported.
- Tagged PDF documents will lose tags after processing.

## PDFDocMerger and PDFBookBinder Limitations

Limitations apply to the PDFDocMerger and PDFBookBinder utilities.

Limitations include:

- The output PDF document version is determined based on the first input PDF document.
- XFA Forms (Adobe's XML Forms Architecture) isn't supported.
- Portable collection (portfolio) isn't supported.
- Tagged PDF documents will lose tags after merging.
- The following objects are preserved in the output, but the navigation panel shows only objects contained in the first input PDF document.
  - Bookmark
  - Attachment
  - Layer
  - Print characteristics (such as paper selection, handling, page range, copies, and scaling)

## PDFSignature Limitations

Limitations apply to the PDFSignature utility.

Limitations include:

- Object signature isn't supported.
- Selective encryption of embedded files isn't supported.
- AES (Advanced Encryption Standard) isn't supported.



- PDFSignature might not work correctly with the digital signature constraints and certificate constraints described in Section 1.2.5 of the PDF 1.7 specification. For more information about the PDF 1.7 specification, see the Adobe website.

# Test Templates with Template Viewer

This topic describes how to use the Template Viewer tool.

## Topics:

- [About Template Viewer](#)
- [Debug Templates](#)
- [Monitor Memory Usage](#)
- [Profile XSLT](#)
- [Validate XML Documents](#)
- [Test Fonts](#)

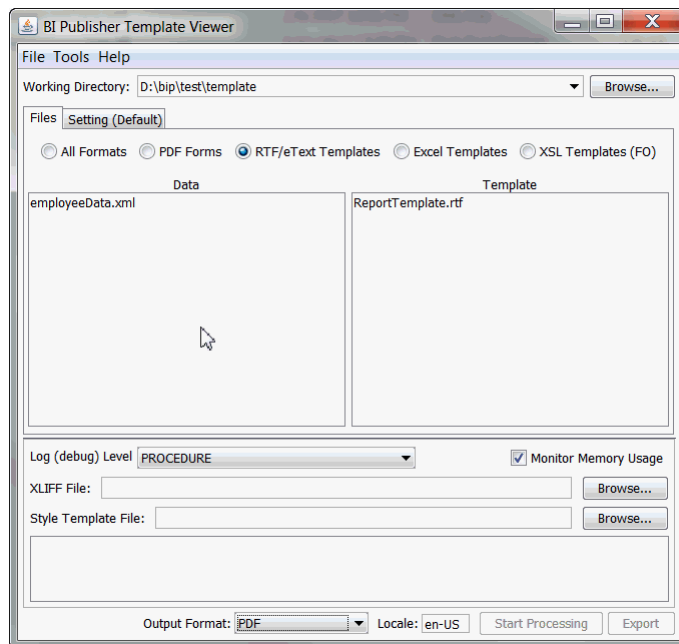
## About Template Viewer

Template Viewer is a Publisher desktop tool for testing templates.

You can download the Publisher desktop tools from the Oracle Analytics Server Home page or from the Publisher Home page. Use the Start menu to launch the Template Viewer installed on your Windows machine.

With Template Viewer desktop tool, you can:

- Debug templates and sub-templates. See [Debug Templates](#).
- Monitor memory used when a template is applied to a data file. See [Monitor Memory Usage](#).
- Profile XSLT to view the time consumed by an XSL code. See [Profile XSLT](#).
- Test the fonts used in a template. See [Test Fonts](#).
- Test translation of a template by selecting the XLIFF file related to the template.
- Export the output files to a selected location by using the **Export** option.
- Run the XSLT processor to validate XML documents. See [Validate XML Documents](#).



## Debug Templates

If you don't see the expected results in the template preview window, you can use Template Viewer to enable trace settings and view the debug messages to solve the problem.

You can also save and view the intermediate XSL file generated after the sample data and template are merged in the XSL-FO processor. If you already use XSL, you'll quickly learn the debugging features in Template Viewer.

To preview template with Template Viewer and view log messages:

1. Open Template Viewer:  
From the Windows desktop, click **Start**, then **Programs**, then **Oracle BI Publisher Desktop**, then **Template Viewer**.
2. Click **Browse** to locate the working directory that contains the sample data file and template file. The data file and template file must reside in the same folder.
3. In the **Files** tab, select the appropriate option. For example, if you're testing a .xsl template, select **Excel Templates**. The **Data** and **Template** regions display the data files and template files present in the directory
4. Click the appropriate data and template files to select them.
5. Select the log (debug) level.
6. If you want to test a style template, browse and specify the style template in the **Style Template File** field.
7. If required, set the report parameters in the **Setting (Default)** tab.
8. From the **Output Format** list, select the output format. For example, Excel.
9. Click **Start Processing**.

The Template Viewer merges the selected data with the selected master template and sub-template and opens the appropriate viewer. View the log messages in the message box.

10. To view the generated XSL:
  - a. Select the data and template files and choose Excel output.
  - b. Select **Tools**, then **Generate XSL file from**, then **Excel Template**.
  - c. At the prompt, save the generated XSL file.
  - d. Navigate to the saved location and open the XSL file in an appropriate viewer.

## Generate Reports in PDF/A, PDF/X, and PDF/UA Formats

You can generate reports in PDF/A, PDF/X, and PDF/UA formats in Template Viewer.

To generate reports in PDF/A, PDF/X, and PDF/UA formats in Template Viewer:

1. Set the font directory to embed fonts in the document.
2. Configure the PDF/A output by setting the properties. Add the key and value pairs for PDF/A output.
3. Add the optional property settings for PDF/A and PDF/X outputs.

### Set the Font Directory

You must set the font directory for Template Viewer.

1. Navigate to the c:\Program Files\Oracle\BI Publisher\BI Publisher Desktop\TemplateViewer directory.
2. Run the following command:

```
java -jar -DXDO_FONT_DIR="..\Template Builder for Word\fonts" tmlviewer.jar
```

### Add Key and Value Pairs for PDF/A Output

Add the key and value pairs for PDF/A output

To add the key and value pairs for PDF/A output:

1. Open Template Viewer.
2. From the Windows desktop, click **Start, Programs**, Oracle Analytics Publisher Desktop, and then **Template Viewer**.
3. Navigate to the **Setting (Default)** tab.
4. Optional: Load the xdo.cfg configuration file containing the font mapping.

If you don't specify the font mapping, the default font is TrueType.

5. Add the following key and value pairs:
  - pdfx-dest-output-profile-data:*File path of the ICC profile data file*  
For PDF/X, ICC profile data file must be CMYK. For example, Coated Fogra 39.
  - pdfx-output-condition-identifier:*Name of one of the standard printing conditions registered with ICC*  
For example, FOGRA39.

## Add the Optional Property Settings for PDF/A and PDF/X Outputs

Add the optional property settings for PDF/A and PDF/X outputs.

To add the optional property settings for PDF/A and PDF/X outputs:

1. Open Template Viewer.
2. From the Windows desktop, click **Start, Programs, Oracle BI Publisher Desktop**, and then **Template Viewer**.
3. Navigate to the **Setting (Default)** tab.
4. Optional: Load the xdo.cfg configuration file containing the font mapping.

If you don't specify the font mapping, the default font is TrueType.

5. For a PDF/A output, add the required optional property settings.

Add the key and value pairs for the PDF/A properties you want to set. For the key, use the internal names of the PDF/A properties mentioned in the documentation for configuring the runtime property for PDF/A output.

6. For a PDF/X output, add the required optional property settings.

Add the key and value pairs for the PDF/X properties you want to set. For the key, use the internal names of the PDF/X properties mentioned in the documentation for configuring the runtime property for PDF/X output.

## Monitor Memory Usage

In Template Viewer, you can track the memory used when a template is applied to a data file.

To monitor the memory used by a template:

1. Select the data file and template.
2. Select the **Monitor Memory Usage** option.
3. Select the output format from the **Output Format** list.
4. Click **Start Processing**.

In the directory that you selected, Template Viewer generates a .csv file with a name that starts with MemMonLong. This log file stores information about the memory used before and after garbage collection. Memory is monitored in regular time intervals that are measured in seconds.

## Profile XSLT

You can use Template Viewer to profile XSLT. The XSL template includes time-logging commands that enable time measurements and act as a profiling tool. When you run a template, the log.csv file is generated to record the time for the running of the XSL code.

To profile XSLT in Template Viewer:

1. Open Template Viewer.  
From the Windows desktop, click **Start**, then **Programs**, then **Oracle BI Publisher Desktop**, then **Template Viewer**.
2. Browse and select the working directory.

3. Select the XML data file and RTF template file to generate XSL.
4. Select **Tools**, then **Generate XSL file from**, then **Inject Profiling into XSL**.
5. Select **RTF Template** to generate XSL.
6. Select Excel from the **Output Format** list.
7. Click **Start Processing**.
8. Open the file using Excel.
9. Note the three areas that consume the most time.

## Validate XML Documents

You can validate an XML document to ensure that it includes the proper code.

To validate an XML document by using an XSL template:

1. Open Template Viewer.  
From the Windows desktop, click **Start**, then **Programs**, then **Oracle BI Publisher Desktop**, then **Template Viewer**.
2. Browse and select the working directory.
3. Select the XML data file.
4. Select an XSL template for testing the XML document.
5. Select **Run XSLT** from the **Output Format** list.

## Test Fonts

You can test fonts to ensure that your reports are displayed correctly.

You must ensure that the required fonts are mapped correctly, to avoid issues such as Roman alphabet characters not being displayed. You must ensure that the font family name in the font mapping exactly matches the name that is used in the template.

1. Open Template Viewer.  
From the Windows desktop, click **Start**, then **Programs**, then **Oracle BI Publisher Desktop**, then **Template Viewer**.
2. Navigate to the **Setting (Default)** tab.
3. Load the xdo.cfg configuration file containing the font mapping.

For example, the Arial font is set in the xdo.cfg file as follows:

```
<font family="Arial" style="italic" weight="bold">  
  <truetype path="D:\fonts\arialbi.ttf" />  
</font>
```

4. Reload the xdo.cfg configuration file if you make any changes to it.
5. Run the report.
  - a. In the **Files** tab, select the data file and template for testing the fonts.
  - b. From the **Output Format** list, select the output format.
  - c. Click **Start Processing**

- d. View the report to verify if the fonts display correctly.

# Frequently Asked Questions for Publisher Data Models and Reports

This section provides answers to frequently asked questions for designing Publisher data models and reports.

## Topics:

- [Top FAQs for Data Model Editor \(Pixel-Perfect Reports\)](#)
  - [How do I check if the data model generates data correctly?](#)
  - [How do I chunk XML data for processing large datasets?](#)
  - [What's the SQL query size limit for bursting?](#)
  - [How do I optimize the SQL queries?](#)
- [Frequently Asked Questions for Pixel-Perfect Reports](#)
  - [What are the recommended template size limits?](#)
  - [What are the data size limitations for an Excel cell in the XLSX output?](#)
  - [How do I test fonts using template viewer?](#)
  - [What do I do when the size of the report data exceeds the maximum limit?](#)
  - [Why aren't the CSV reports formatted as specified in the templates?](#)
  - [How do I include the ID of the submitter in the report?](#)
  - [How do I specify "True" or "False" as Text instead of Boolean in an Excel template if the data file corresponding to the fields contain "True" or "False" as Text value?](#)
  - [Where are the draft Publisher objects stored?](#)
  - [What's the maximum number of fields you can add using Template Builder in an Excel template?](#)

## Top FAQs for Data Model Editor (Pixel-Perfect Reports)

The top FAQs for creating and managing data models for pixel-perfect reports are identified in this topic.

### How do I check if the data model generates data correctly?

Open the data model, click **Data**, and then click **View** to view a maximum of 200 rows of data. If you want to view the complete data, create a report, and then view the report online or schedule the report.

### How do I chunk XML data for processing large datasets?

For processing large datasets, enable XML data chunking at the instance level or at the data model level.



**What's the SQL query size limit for bursting?**

The output of an SQL query is limited to 200,000 rows.

**How do I optimize the SQL queries?**

Use the **Skip Unused Dataset Query**, **Optimize Query Execution**, and **Multithread Query Execution** data model properties to optimize SQL queries.

## Frequently Asked Questions for Pixel-Perfect Reports

This topic provides frequently asked questions about designing Publisher Reports.

**What are the recommended template size limits?**

- Publisher template limit: 50 MB
- RTF template limit: 30MB
- Microsoft Excel template limit: 50 MB and 65K rows
- PDF template limit: 10 MB

**What are the data size limitations for an Excel cell in the XLSX output?**

When you generate an XLSX output from an RTF or XPT or Excel template, Excel and Publisher limits the data in an Excel cell.

Excel limits the number of characters in an Excel cell to 32,767 characters. In addition to the Excel limit, Publisher limits the data size in a single cell to 65535 bytes when data is converted to UTF-8 because of an internal processing limit.

**How do I test fonts using template viewer?**

1. Run the template viewer and navigate to the Setting tab.
2. Load the `xdo.cfg` configuration file that contains the font mapping. Reload the `xdo.cfg` file after any change you make to it.
3. Run the report to see how the fonts look.

**What do I do when the size of the report data exceeds the maximum limit?**

Try these tips to handle large amounts of data:

- Add a filter to the report to select only the necessary columns and limit the number of rows returned.
- Enable SQL or XML pruning to remove unused data columns.
- Perform aggregations such as counts, sums, and averages within the query to complete the calculations at the database layer.
- When using the RTF template or XSL template, use xpath to improve data navigation. Follow the best practices for designing RTF templates.
- Use data chunking for large amounts of data.
- Increase the value of the **Maximum Report Data Size** and **Free memory threshold** properties, but use care not to incur a loss in performance.

**Why aren't the CSV reports formatted as specified in the templates?**

Reports in CSV format are generated directly from the data models, without generating an XML file. You can't use a template to format the CSV reports. If you want to include white spaces in the scheduled CSV reports, select the **Enable CSV Output** data model property, and deselect the **Save Data for Republishing** option.

**How do I include the ID of the submitter in the report?**

Add the `xdo_user_name` system variable as a parameter to your report data model, and then reference the parameter value in your report. See [Include User Information Stored in System Variables in Your Report Data](#). Don't use database functions such as the `SYS_CONTEXT` function in Publisher reports.

**How do I specify "True" or "False" as Text instead of Boolean in an Excel template if the data file corresponding to the fields contain "True" or "False" as Text value?**

When you enter "True" or "False" in an Excel cell, the smart Excel function formats the cell as Boolean.

If you want your XML data to consider "True" or "False" value as Text instead of Boolean, clear the cell where you have entered "True" or "False", format the cell as Text, and then enter "True" or "False".

**Where are the draft Publisher objects stored?**

All the temporary files of data models and reports are stored in the My Folders/Draft folder. Irrespective of whether the temporary files are created by a Publisher flow or saved by users explicitly in the My Folders/Draft folder, Publisher deletes files that are more than 24 hours old from the My Folders/Draft folder.

**What's the maximum number of fields you can add using Template Builder in an Excel template?**

The Template Builder for Excel limits the number of fields per Excel template to 990.