

Oracle® Fusion Middleware

User's Guide for Oracle Business Intelligence Publisher

11g Release 1 (11.1.1)

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Explains how to view, schedule, deliver, publish, and share reports created in Oracle Business Intelligence Publisher.

Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher, 11g Release 1 (11.1.1)

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Contents

Preface	vii
Audience	vii
Documentation Accessibility	vii
Related Documentation and Other Resources	vii
Conventions	viii
New Features for Oracle BI Publisher Users	ix
New Features for Oracle BI Publisher 11g Release 1 (11.1.1.6)	ix
New Features for Oracle BI Publisher 11g Release 1 (11.1.1.5)	x
New Features for Oracle BI Publisher 11g Release 1 (11.1.1.3)	xi
1 Introduction to Using Oracle Business Intelligence Publisher	
1.1 Introduction to Oracle Business Intelligence Publisher	1-1
1.1.1 Overview for Report Consumers	1-1
2 Getting Started	
2.1 Accessing Oracle Business Intelligence Publisher	2-1
2.1.1 Logging in with Credentials	2-1
2.1.2 Logging in as Guest	2-2
2.2 Setting My Account Preferences and Viewing My Groups	2-3
2.2.1 To Access the My Account dialog:	2-3
2.2.2 Setting General Preferences	2-3
2.2.2.1 Report Locale	2-4
2.2.2.2 UI Language	2-4
2.2.2.3 Time Zone	2-4
2.2.2.4 Accessibility Mode	2-4
2.2.3 Changing Your Password	2-4
2.2.4 Viewing Your User Groups	2-4
2.3 About the Home Page	2-5
2.3.1 Create	2-5
2.3.2 Browse/Manage	2-6
2.3.3 Get Started	2-6
2.3.4 Recent	2-7
2.3.5 Favorites	2-7
2.4 About the Catalog	2-7

2.4.1	Browsing the Catalog	2-8
2.4.2	Using the Location Bar to Find Your Place and Navigate Back.....	2-8
2.5	About the Global Header.....	2-9
2.6	Searching the Catalog.....	2-9
2.7	For Oracle E-Business Suite Users: Switching Responsibilities and Reporting Organization	2-10

3 Viewing a Report

3.1	About Viewing Reports in BI Publisher	3-1
3.2	Viewing a Report	3-1
3.3	Using the Report Viewer Options	3-2
3.3.1	Parameters	3-3
3.3.1.1	The Parameter Search Dialog.....	3-4
3.3.2	Layouts	3-4
3.3.3	View Report and Choose Other Output Types	3-5
3.3.4	Actions.....	3-7
3.4	Creating an Ad Hoc Pivot Table with the Analyzer	3-8
3.4.1	Limitations of the Online Analyzer.....	3-9
3.4.2	Accessing the Online Analyzer.....	3-9
3.4.3	About the Online Analyzer Toolbar	3-9
3.5	Creating an Interactive Pivot Table.....	3-9
3.6	Saving the Interactive Pivot Table as a Layout.....	3-12
3.7	Using the Analyzer for Excel.....	3-13
3.7.1	Features	3-13
3.7.2	Launching the Analyzer for Excel.....	3-14
3.8	Using the BI Publisher Menu	3-14
3.9	About the Open Template Dialog	3-15
3.10	Logging in Through Excel	3-16

4 Creating Report Jobs

4.1	Navigating to the Schedule Report Job Page	4-1
4.2	Setting General Options	4-1
4.3	Setting Output Options.....	4-2
4.3.1	Adding Outputs	4-3
4.3.2	Adding Destinations	4-4
4.3.2.1	Email.....	4-5
4.3.2.2	Printer.....	4-5
4.3.2.3	Fax.....	4-5
4.3.2.4	FTP	4-5
4.3.2.5	Web Folder	4-5
4.4	Defining the Schedule for a Job	4-6
4.4.1	Defining a Recurrence Pattern	4-6
4.4.1.1	Once.....	4-6
4.4.1.2	Hourly/Minute.....	4-6
4.4.1.3	Daily	4-6
4.4.1.4	Weekly.....	4-6
4.4.1.5	Monthly.....	4-7

4.4.1.6	Annually	4-7
4.4.1.7	Specific Dates	4-7
4.4.2	Enabling a Schedule Trigger	4-7
4.5	Configuring Notifications	4-8
4.5.1	Adding Notifications.....	4-8
4.5.1.1	Email.....	4-9
4.5.1.2	HTTP	4-9
4.6	Submitting and Monitoring a Job	4-9
4.7	Create a Job from an Existing Job	4-9
4.8	Creating a Bursting Job	4-10
4.9	Advanced Topics.....	4-10
4.9.1	Incrementing Date Parameters	4-10
4.9.2	Defining a Destination File Name Dynamically Using a Date Expression	4-11
4.9.2.1	Examples.....	4-12

5 Viewing and Managing Report Jobs

5.1	About the Manage Report Jobs Page	5-1
5.2	Viewing Jobs for a Specific Report	5-2
5.3	Searching for Report Jobs	5-2
5.4	Setting the Time Zone for Viewing Jobs.....	5-3
5.5	Viewing Job Details	5-3
5.6	Pausing Jobs.....	5-3
5.7	Resuming Jobs	5-3
5.8	Deleting Jobs.....	5-4
5.9	Editing Jobs.....	5-4
5.10	Refreshing the Manage Report Jobs Page	5-4

6 Viewing and Managing Report History

6.1	Viewing Report Job History and Saved Output.....	6-1
6.2	Viewing Job History for a Specific Report	6-2
6.3	Searching for Report Job History.....	6-3
6.4	Viewing Details of a Job History	6-3
6.5	Downloading Data from a Report Job	6-4
6.6	Republishing a Report from History.....	6-5
6.7	Sending an Output to a New Destination	6-5
6.8	Monitoring Running Jobs	6-6
6.9	Canceling a Running Job.....	6-7
6.10	Getting Error and Warning Information for Reports	6-8
6.11	Deleting a Job History	6-8
6.12	Refreshing the Report Job History Page.....	6-9

7 Managing Objects in the BI Publisher Catalog

7.1	Overview of the Catalog	7-1
7.2	Objects Stored in the Catalog	7-2
7.3	Creating a Folder or Subfolder	7-2
7.4	Performing Tasks on Catalog Objects.....	7-3

7.5	Downloading and Uploading Catalog Objects.....	7-4
7.6	Understanding the Impact of Taking Actions on Objects Referenced by Reports.....	7-4
7.7	Exporting and Importing Catalog Translation Files.....	7-5

Index

Preface

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

Audience

This document is intended for report consumers who will be viewing and scheduling reports in Oracle BI Publisher.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit

<http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Related Documentation and Other Resources

See the Oracle Business Intelligence documentation library for a list of related Oracle Business Intelligence documents.

In addition, go to the Oracle Learning Library for Oracle Business Intelligence-related online training resources.

System Requirements and Certification

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

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

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

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

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<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.

New Features for Oracle BI Publisher Users

This preface describes changes to Oracle BI Publisher report viewing and scheduling features for Oracle Business Intelligence Publisher 11g Release 1 (11.1.1). The following information describes the differences in features, tools, and procedures between releases.

This preface contains the following topics:

- [New Features for Oracle BI Publisher 11g Release 1 \(11.1.1.6\)](#)
- [New Features for Oracle BI Publisher 11g Release 1 \(11.1.1.5\)](#)
- [New Features for Oracle BI Publisher 11g Release 1 \(11.1.1.3\)](#)

New Features for Oracle BI Publisher 11g Release 1 (11.1.1.6)

New features for report consumers in Oracle BI Publisher 11g Release 1 (11.1.1.6) include:

- [Edit Scheduled Jobs](#)
- [Event-Driven Schedules](#)
- [Enhancements to Parameter Display Options](#)
- [Favorites Region](#)

Edit Scheduled Jobs

You can now edit scheduled report jobs. After editing a job you can either save the changes to the job or save the changes as a new job. This enables the creation of new jobs from existing jobs. Edit scheduled jobs from the Manage Report Jobs page. For more information, see [Section 5.9, "Editing Jobs."](#)

Event-Driven Schedules

The execution of a scheduled report job can now be conditionalized based on an event. A report data model can now include a Schedule Trigger that you enable in the report job definition. When the report job is scheduled to run, the trigger is executed. If no data is returned from the trigger, the job instance is skipped. If data is returned, the job instance runs as scheduled. See [Section 4.4.2, "Enabling a Schedule Trigger"](#) for more information.

New Job Status: Skipped

In support of the event-driven schedule feature, a new job status is introduced in this release. If the schedule trigger returns no data, the job instance is "skipped." The skipped status can be seen in the **Report Job History** page.

Enhancements to Parameter Display Options

Enhancements to parameter display options include:

- Support for radio button and check box display of values
Parameters that are defined as a menu in the data model can now be configured to display the menu options as a list of radio buttons or check boxes. Parameters configured to support one value support the option to display as radio buttons. Parameters configured to support multiple values support the option to display as check boxes.
- New options for placement of parameters in the report viewer
Previously the report viewer always displayed the parameters in a horizontal region across the top of the viewer. In this release the display of the parameter region can also be configured in one of the following ways:
 - In a vertical region along the right side of the viewer
 - As a dialog
 - As a separate full page
- New report viewer action button to show or hide parameters
This release adds an action button to the report viewer to enable users to hide or show the parameter region. This enhancement complements the new parameter display options. When report parameters are configured to display as a dialog or in a separate full page, the parameter display region is dismissed when the viewer displays the report. Use the **Parameters** button to redisplay the parameter region to make new selections.
- Search added to menus
All parameter menus having more than a specified number of options provide a Search option. For more information, see [Section 3.3.1.1, "The Parameter Search Dialog."](#)
- Option to remove the **Apply** button
Reports can now be configured to remove the parameter **Apply** button. In these reports the action of selecting a new parameter value automatically reruns the report.

Favorites Region

A new **Favorites** region on the Home page enables you to create bookmarks to the items to which you want quick access. From the Favorites region you can view, schedule, configure, or edit reports and other objects. The Manage Favorites tool enables you to drag and drop items from the catalog to the region, or you can use an object's **More** link in the catalog to add it to Favorites. For more information, see [Section 2.3.5, "Favorites."](#)

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

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

- [Access Report History from the Manage Report Jobs Page](#)
- [Monitor Running Report Jobs](#)
- [Cancel Running Jobs](#)
- [Excel 2007 Output Type](#)

Access Report History from the Manage Report Jobs Page

The Manage Report Jobs page now includes a History link for each job to enable you to quickly view the completed runs of a job. For more information, see [Section 5.1, "About the Manage Report Jobs Page."](#)

Monitor Running Report Jobs

While a scheduled report job is in running status, you can now monitor the stages of the report processing in the Report Job History page. For more information, see [Section 6.8, "Monitoring Running Jobs."](#)

Cancel Running Jobs

When a scheduled report job is in running status, you can now cancel the running job from the Report Job History page. For more information, see [Section 6.9, "Canceling a Running Job."](#)

Excel 2007 Output Type

Excel 2007 is a new output type available for reports. When selected, BI Publisher generates the output in Excel XML format (.xlsx). If you have Excel 2007 or later installed, this option provides the best preservation of layout and formatting. For more information see [Section 3.3, "Using the Report Viewer Options."](#)

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

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

- [Major User Interface Improvements](#)
- [Shared Oracle BI Presentation Catalog](#)
- [Interactive Viewer](#)
- [Enhanced Scheduling Options](#)

Major User Interface Improvements

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

Shared Oracle BI Presentation Catalog

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

Interactive Viewer

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

Enhanced Scheduling Options

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

Introduction to Using Oracle Business Intelligence Publisher

This chapter introduces Oracle BI Publisher for report consumers and describes the features specific to viewing and scheduling reports.

This chapter includes the following section:

- [Section 1.1, "Introduction to Oracle Business Intelligence Publisher"](#)

1.1 Introduction to Oracle Business Intelligence Publisher

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

Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher describes how report consumers use BI Publisher to view and schedule reports. See the other guides that are listed in [Table 1-1](#) for information about using the product for other business roles.

Table 1-1 Other BI Publisher Guides

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

1.1.1 Overview for Report Consumers

A report consumer performs the following tasks:

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

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

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

- [Section 2.4.1, "Browsing the Catalog"](#)
- [Section 3.1, "About Viewing Reports in BI Publisher"](#)
- [Section 3.4, "Creating an Ad Hoc Pivot Table with the Analyzer"](#)
- [Section 3.7, "Using the Analyzer for Excel"](#)
- [Section 4.1, "Navigating to the Schedule Report Job Page"](#)
- [Section 4.8, "Creating a Bursting Job"](#)
- [Section 5.1, "About the Manage Report Jobs Page"](#)
- [Section 6.1, "Viewing Report Job History and Saved Output"](#)

Getting Started

This chapter describes basic features of the BI Publisher application including setting preferences, navigating the catalog, and accessing task menus.

This chapter includes the following sections:

- [Section 2.1, "Accessing Oracle Business Intelligence Publisher"](#)
- [Section 2.2, "Setting My Account Preferences and Viewing My Groups"](#)
- [Section 2.3, "About the Home Page"](#)
- [Section 2.4, "About the Catalog"](#)
- [Section 2.5, "About the Global Header"](#)
- [Section 2.6, "Searching the Catalog"](#)
- [Section 2.7, "For Oracle E-Business Suite Users: Switching Responsibilities and Reporting Organization"](#)

Note: If your implementation of BI Publisher is integrated with Oracle Business Intelligence Enterprise Edition (BI EE), you will most likely access BI Publisher through the Oracle BI EE application. See "Introducing Oracle Business Intelligence Enterprise Edition" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition* for information about the BI Publisher features in the Oracle BI EE interface.

2.1 Accessing Oracle Business Intelligence Publisher

You can access BI Publisher in the following ways:

- [Section 2.1.1, "Logging in with Credentials"](#)
- [Section 2.1.2, "Logging in as Guest"](#)

2.1.1 Logging in with Credentials

To log in with credentials:

1. Navigate to the URL provided by your administrator (for example: <http://example.com:9704/xmlpserver>), as shown in [Figure 2-1](#).

Figure 2–1 BI Publisher Log In Page



Oracle BI Publisher
 Copyright © 2003, 2010, Oracle and/or its affiliates. All rights reserved.

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

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

Get Started:

- To view reports, see [Section 3.1, "About Viewing Reports in BI Publisher."](#)
- To set user preferences, see [Section 2.2, "Setting My Account Preferences and Viewing My Groups."](#)
- To view reports, see [Section 3.1, "About Viewing Reports in BI Publisher."](#)
- To browse the catalog, see [Section 2.4.1, "Browsing the Catalog."](#)
- To schedule reports, see [Section 4.1, "Navigating to the Schedule Report Job Page."](#)

2.1.2 Logging in as Guest

If your administrator has enabled guest access, then a **Guest** button displays on the login page.

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

To log in as a guest:

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

2.2 Setting My Account Preferences and Viewing My Groups

Use the **My Account** dialog to:

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

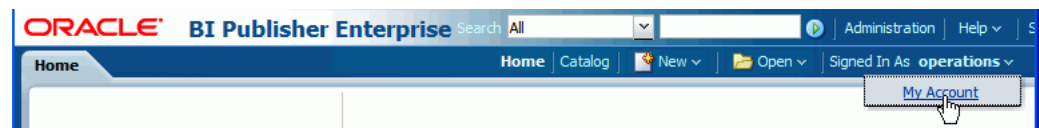
Note: Your preferences may be inherited from another Oracle product. If this is true for your work environment, you cannot update your preferences from within BI Publisher. If you are not sure where to update your preferences, ask your administrator.

When BI Publisher is integrated with Oracle Business Intelligence Enterprise Edition (BI EE), the Report Locale, UI Language, and Time Zone user preferences are set in the Oracle BI EE application. For information, see "Setting Preferences" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*. When you update your BI Publisher preferences in Oracle BI EE, you must start a new BI Publisher HTTP session for these to take effect in the BI Publisher interface.

2.2.1 To Access the My Account dialog:

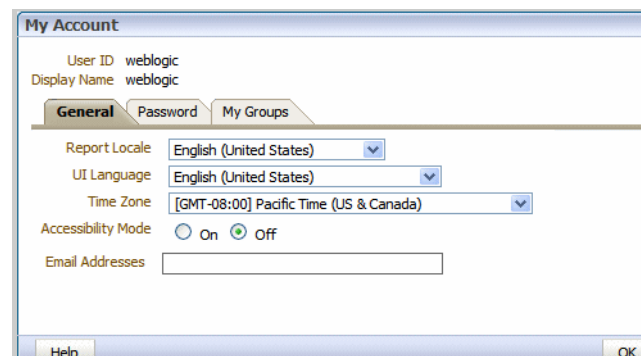
1. In the global header, click your user name displayed after **Signed In As** and then select **My Account** as shown in [Figure 2–2](#).

Figure 2–2 Accessing My Account



The **My Account** dialog is shown in [Figure 2–3](#).

Figure 2–3 My Account Dialog



2.2.2 Setting General Preferences

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

- [Report Locale](#)

- [UI Language](#)
- [Time Zone](#)
- [Accessibility Mode](#)

Note: The **Email Addresses** field is reserved for future use and is not functional in this release.

2.2.2.1 Report Locale

A locale is a language and territory combination (for example, English (United States) or French (Canada)). BI Publisher uses the report locale selection to determine the following:

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

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

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

2.2.2.2 UI Language

The UI language is the language in which the user interface displays. The language that you selected at login is selected as the default. Select from the languages that are available for your installation.

2.2.2.3 Time Zone

Reports display the time according to the time zone preference selected here. You can override this setting when creating a scheduled report job, as described in [Chapter 4, "Creating Report Jobs."](#) Note that the time displayed on the user interface and reflected in report processing times is governed by the BI Publisher server time zone.

2.2.2.4 Accessibility Mode

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

2.2.3 Changing Your Password

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

If your account password settings are inherited from another application, then you cannot update your password here.

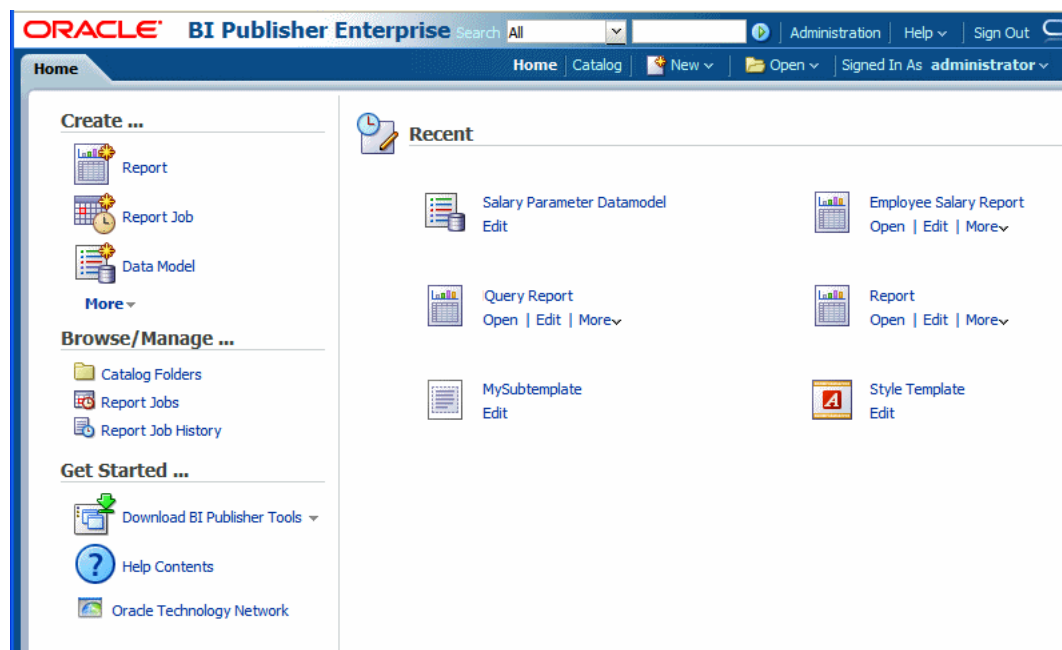
2.2.4 Viewing Your User Groups

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

2.3 About the Home Page

The Oracle BI Publisher Home page provides an intuitive, task-based entry into Oracle BI Publisher's functionalities. The Home page is divided into sections that enable you to quickly begin a specific task, locate an object, or access documentation. [Figure 2-4](#) shows the Home page.

Figure 2-4 BI Publisher Home Page



The Home page consists of the following sections:

- [Section 2.3.1, "Create"](#)
- [Section 2.3.2, "Browse/Manage"](#)
- [Section 2.3.3, "Get Started"](#)
- [Section 2.3.4, "Recent"](#)
- [Section 2.3.5, "Favorites"](#)

2.3.1 Create

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

For more information on each task, see the documents that are listed in [Table 2-1](#).

Table 2-1 Lists of Tasks and Documents

Task	More Information
Create Report	"Creating or Editing a Report" in <i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i>
Create Report Job	Chapter 4, "Creating Report Jobs"
Create Data Model	"Using the Data Model Editor" in <i>Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher</i>

Table 2–1 (Cont.) Lists of Tasks and Documents

Task	More Information
Create Style Template	"Creating and Implementing Style Templates" in <i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i>
Create Subtemplate	"Understanding Subtemplates" in <i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i>

2.3.2 Browse/Manage

The Browse/Manage section provides quick access to the catalog, where you can browse and manage reports and other catalog objects; and to the Report Jobs and the Report Jobs History pages, where you can view and manage scheduled, running, and completed report jobs.

2.3.3 Get Started

The Get Started section contains the following links:

- **Download BI Publisher Tools**

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

- BI Publisher Desktop (32 bit or 64 bit)

BI Publisher Desktop includes:

- * Template Builder for Microsoft Word
- * Template Builder for Microsoft Excel
- * Template Viewer

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

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

The Template Viewer enables the testing of most template types from your desktop.

- **Analyzer for Excel**

This add-in for Microsoft Excel enables you to manipulate the results of a report query in Excel and also to upload a spreadsheet back to BI Publisher to use as a layout. For more information, see [Section 3.7, "Using the Analyzer for Excel."](#)

- **Oracle SQL Developer**

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

SQL Developer enhances productivity and simplifies your database development tasks.

- **Help Contents**
Opens the Help table of contents.
- **Oracle Technology Network**
Accesses the Oracle Technology Network (OTN) to search for technical articles about Oracle products, participate in discussions about Oracle products, ask the user community technical questions, and search for and download Oracle products.

2.3.4 Recent

The Recent section contains the reports and other objects that you have recently viewed, created, or updated. You can take actions on these objects directly from the Recent region; for example, you can open, edit, schedule, and view jobs or job history for a report.

Note: When BI Publisher is integrated with Oracle BI Enterprise Edition, this region is updated only when the BI Publisher objects are accessed from the Oracle BI EE interface.

2.3.5 Favorites

The Favorites region enables you to create your own list of objects for quick access. From the Favorites region you can view, schedule, configure, or edit the objects that you place there (providing you also have proper permissions). There are several ways to add objects to the Favorites region:

- Locate the object in the catalog, click the **More** link, and then click **Add to Favorites**
- From the Report Viewer, click the **Actions** menu, and then click **Add to Favorites**
- Use the **Manage** link on the Home page to add reports

To add and delete reports from the Favorites region using the Manage link:

Click the **Manage** link to open the Favorites area for editing.

To add a report to Favorites:

1. Click the report in the catalog pane.
2. Drag the report to the Favorites region.

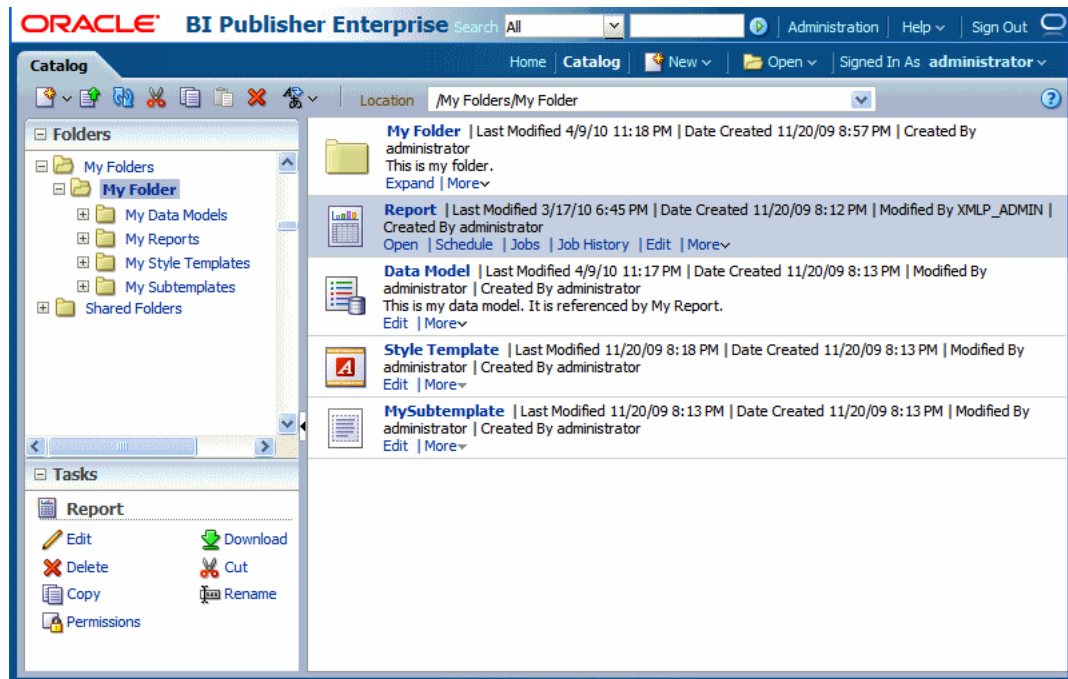
To delete an object from Favorites:

1. Locate the item and click the **More** link.
2. Click **Remove**.

2.4 About the Catalog

The catalog stores the BI Publisher objects, such as reports, data models, and style templates. [Figure 2-5](#) shows the Catalog page.

Figure 2–5 Catalog Page



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

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

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

For more information about the functions you can perform in the catalog, see [Section 7.1, "Overview of the Catalog"](#)

2.4.1 Browsing the Catalog

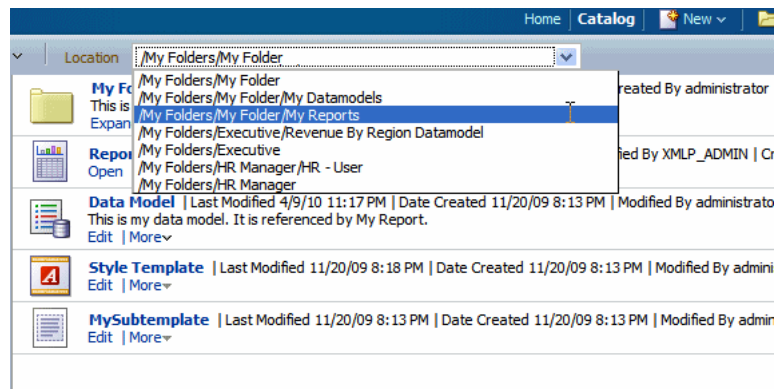
Use the Folders pane of the Catalog page to display and navigate the content of personal (My Folders) and shared folders that all users can access. Select a folder to view its contents in the display area.

2.4.2 Using the Location Bar to Find Your Place and Navigate Back

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

To navigate back to a folder you previously visited in this session, click the arrow on the **Location** bar to open the list of locations as shown in [Figure 2–6](#).

Figure 2–6 Viewing List of Locations



2.5 About the Global Header

The global header, shown in Figure 2–7, contains links and options that enable you to quickly begin a task or locate a specific object within BI Publisher. Many of the options that are available from the global header are also available within the Home page.

Figure 2–7 Global Header



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

The **Signed In As** area enables you to access the **My Account** dialog, where you can specify your preferences. For more information, see [Section 2.2, "Setting My Account Preferences and Viewing My Groups."](#)

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

2.6 Searching the Catalog

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

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

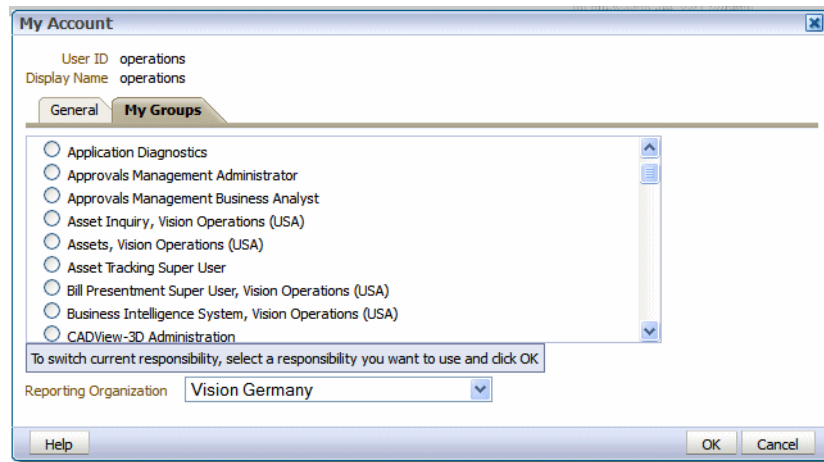
From the results page you can select and perform an action on an object from the results, filter the search results, or start a new search.

2.7 For Oracle E-Business Suite Users: Switching Responsibilities and Reporting Organization

If BI Publisher is integrated with Oracle E-Business Suite security, you can switch responsibilities as follows:

1. In the global header, click your user name displayed after **Signed In As** and then select **My Account**.
2. Click **My Groups** to view the list of responsibilities and your reporting organization, as shown in [Figure 2–8](#).

Figure 2–8 Viewing E-Business Suite Responsibilities and Reporting Groups



3. To change your current responsibility, select a new responsibility from the list. To change your reporting organization, select it from the **Reporting Organization** menu and click **OK**.

Viewing a Report

This chapter describes viewing reports in BI Publisher, including interacting with report components, viewing alternative layouts, changing output options, and creating interactive pivot tables.

This chapter includes the following sections:

- [Section 3.1, "About Viewing Reports in BI Publisher"](#)
- [Section 3.2, "Viewing a Report"](#)
- [Section 3.3, "Using the Report Viewer Options"](#)
- [Section 3.4, "Creating an Ad Hoc Pivot Table with the Analyzer"](#)
- [Section 3.5, "Creating an Interactive Pivot Table"](#)
- [Section 3.6, "Saving the Interactive Pivot Table as a Layout"](#)
- [Section 3.7, "Using the Analyzer for Excel"](#)
- [Section 3.8, "Using the BI Publisher Menu"](#)
- [Section 3.9, "About the Open Template Dialog"](#)
- [Section 3.10, "Logging in Through Excel"](#)

3.1 About Viewing Reports in BI Publisher

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

3.2 Viewing a Report

All reports reside in the catalog. The Home page displays recently viewed and your favorite reports for quick access.

To view a report:

1. Navigate to the report.

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

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

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

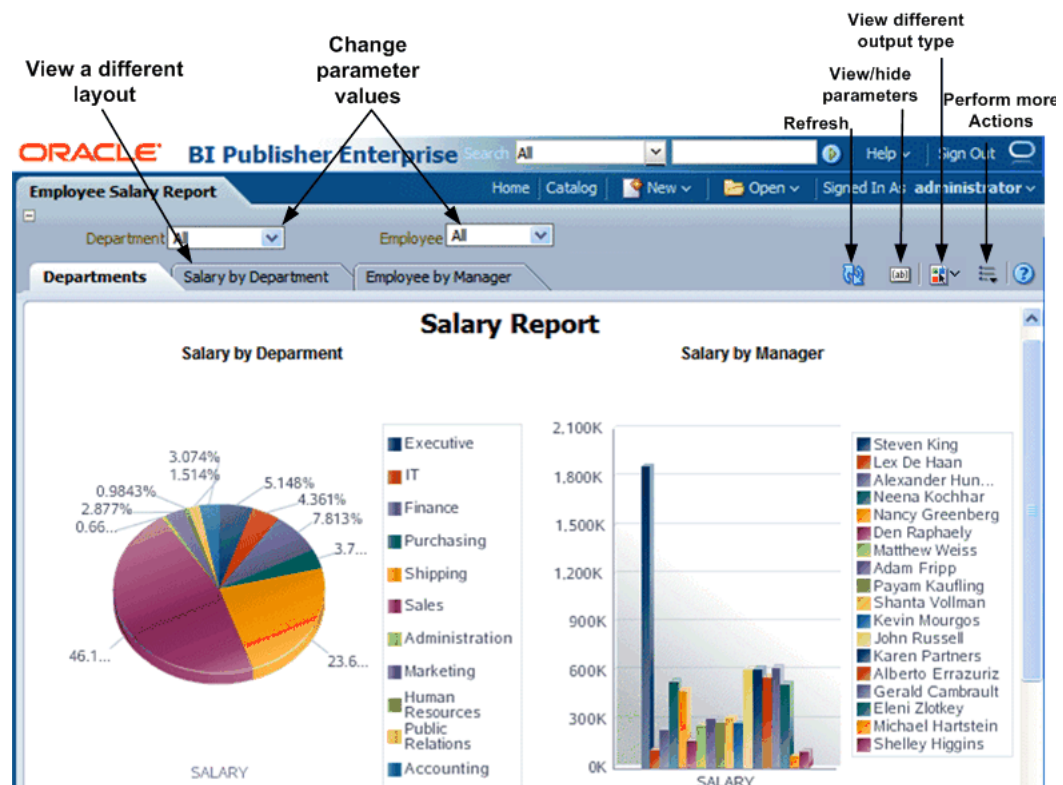
Note: Some reports are not configured for online viewing. For these reports, the **Open** link does not display. Select **Schedule** to schedule a report job. See [Section 4.1, "Navigating to the Schedule Report Job Page."](#)

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

3.3 Using the Report Viewer Options

Figure 3–1 shows the report viewer:

Figure 3–1 Report Viewer



The following are options available in the report viewer. Not all options are available for all reports. See each section for more details:

- [Section 3.3.1, "Parameters"](#)
- [Section 3.3.2, "Layouts"](#)
- [Section 3.3.3, "View Report and Choose Other Output Types"](#)
- [Section 3.3.4, "Actions"](#)

3.3.1 Parameters

Reports that enable parameter value input present the parameter selection prompts in the report viewer. The presentation of the prompts varies according to the report configuration. Parameters can be presented on the top of the report viewing area, to the left side of the report viewing area, as a pop-up dialog, or as prompts on the page before the report is displayed.

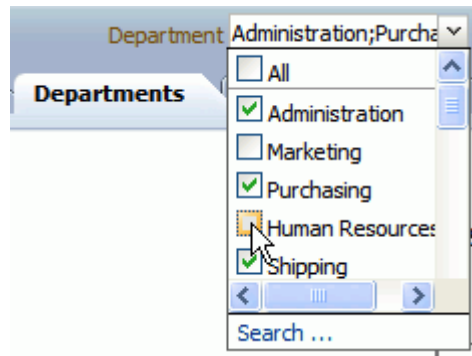
The parameter prompts can be hidden or displayed by clicking the **Parameters** action button in the upper right area of the report viewer.

Some reports include an **Apply** button that you must click to redisplay the report after making parameter selections. If there is no **Apply** button, the report is regenerated automatically after you make a new value selection. The display of the **Apply** button is a parameter property setting. For information about setting this property, see "Configuring Parameter Settings for the Report" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

Parameter prompts may be one of the following types:

- A list from which you can make a selection.
 - A list may be displayed as a menu or all values of the list may be displayed in a series. Some lists support multiple selections. A multi-select list displays a check box next to each item. Click the box to select the item. Click the box again to deselect the item, as shown in [Figure 3-2](#).

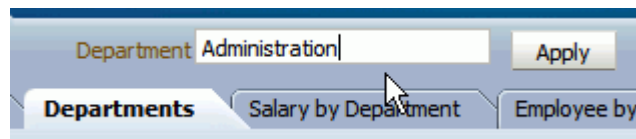
Figure 3-2 Multi-Select List Displayed as a Menu



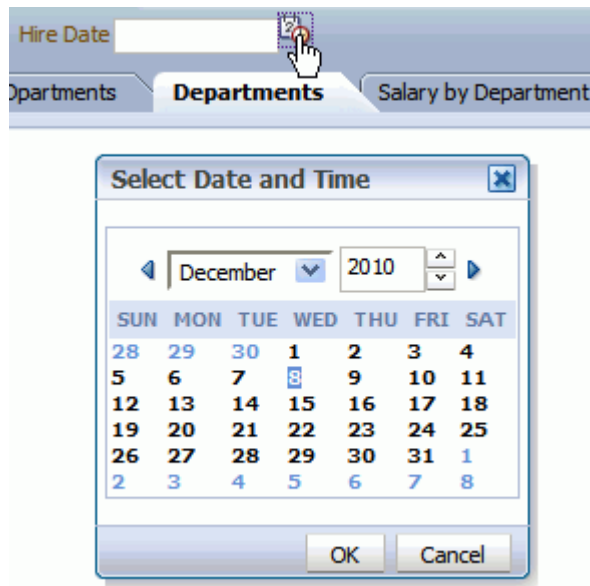
Lists with many values support search. Click **Search** at the bottom of the scroll list to open the **Search** dialog. See [Section 3.3.1.1, "The Parameter Search Dialog"](#).

- A text box into which you can type a value, as shown in [Figure 3-3](#).

Figure 3-3 Text Box

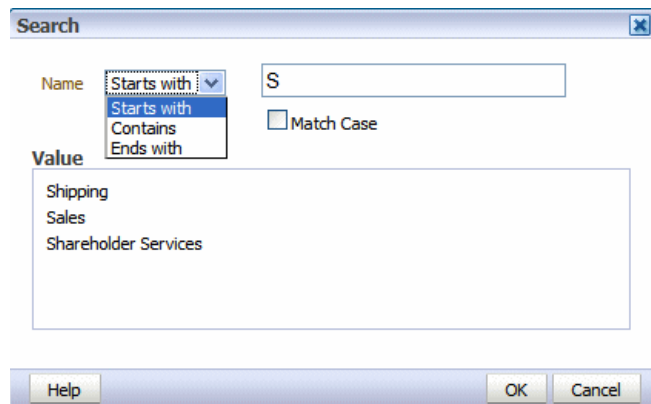


- A date editor that launches a calendar from which to select the date, as shown in [Figure 3-4](#).

Figure 3–4 Date Editor

3.3.1.1 The Parameter Search Dialog

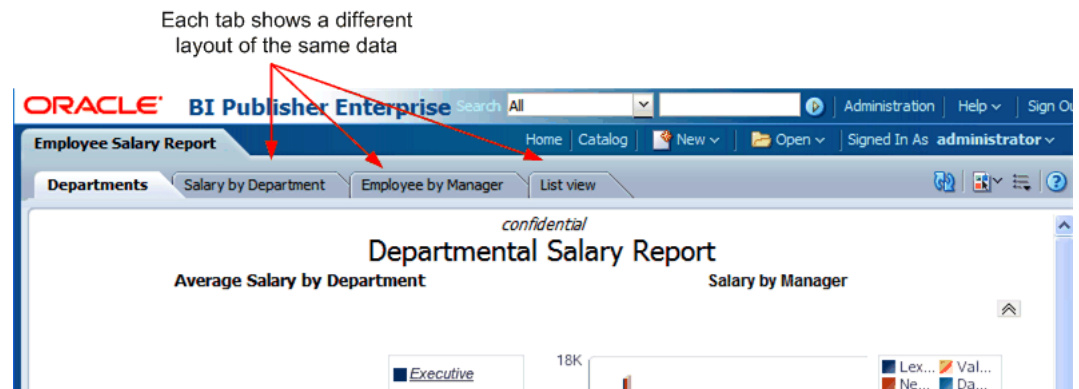
To search for a parameter value in a list, click **Search** at the bottom of the parameter scroll list to launch the **Search** dialog. Enter a search string and then choose whether the value you are looking for starts with, ends with, or contains the entered string. You can also use the "%" as a wild card in your search string.

Figure 3–5 Parameter Search Dialog

For parameters that support multiple value selections, the search dialog includes a shuttle interface to select multiple returned values.

3.3.2 Layouts

When multiple layouts are available, they are displayed as separate tabs in the report viewer page, as shown in [Figure 3–6](#). To view the report displayed in a different layout, click its tab. Note that different layouts may have different output types enabled.

Figure 3–6 Multiple Layout Tabs

3.3.3 View Report and Choose Other Output Types

The **View Report** list contains other output types that are available for this report. When you select an option from the menu, the output automatically renders either in the browser or in a spawned application.

Figure 3–7 View Report List

Possible output options are:

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

- **Excel 2000** - select this output type only if you are running the earlier versions of Microsoft Excel 2000 or 2002. This option generates HTML that can be opened in Excel. It does not support embedded images.
- **Excel 2007** - select this option to generate the report in Excel.xlsx (Excel XML format). If you have Excel 2007 or later installed, this option provides the best preservation of layout and formatting.

Note: For output format Excel 2007 (file extension xlsx), BI Publisher does not apply any formatting for number and date. BI 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 Excel 2007 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 Excel 2007 output file are formatted in fr-FR locale.
-
-

- **PowerPoint** - select this output type to generate a PowerPoint file compatible with Microsoft PowerPoint 2003.
- **PowerPoint 2007** - select this output type to generate a PowerPoint 2007 file (.pptx).
- **PDF/A** - is an archiving standard to support reports that require long-term preservation. 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** - is 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 does not serve the print production, such as signatures, comments, and embedded multimedia.
- **Flash** - displays output for templates designed using Adobe Flash. You must have the Adobe Flash Player Plug-in installed for your Web browser.
- **CSV** - displays the data in comma separated value format. The data must be in a simple <rowset>/<row> structure.
- **Data** - displays the report XML data.

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

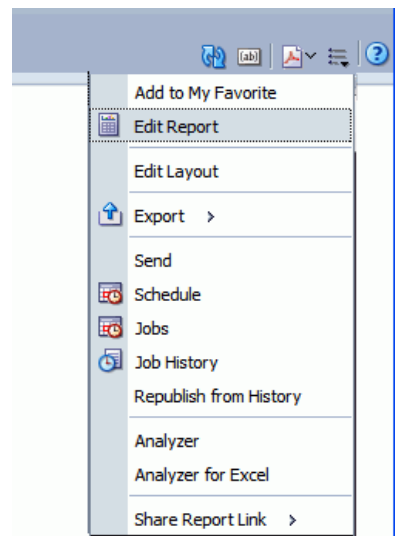
- **MHTML** - (Mime HyperText Markup Language) format enables you to save a Web page and its resources as a single MHTML file (.mht), in which all images and linked files are saved as a single entity. Use this option to send or save HTML output and retain the embedded images and stylesheet formatting.

- **PDFZ** - (Zipped PDF) - this option is only available for reports that have been designed to enable zipped PDF output. BI Publisher generates a zip file containing the report PDF output and index files. For information on designing a report to generate a zipped PDF, see "Generating Zipped PDF" Output in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.
- **FO** - generates an XML file with the XSL-FO information.

3.3.4 Actions

The **Actions** menu provides more actions that you can take on the report. The complete list of possible options follows. The options that are available to you depend on your user privileges and properties set for the report. The full list of options is shown in [Figure 3-8](#).

Figure 3-8 Action Menu Options



- **Add to My Favorite** adds this report to your **My Favorites** list on your home page.
- **Edit Report** enables you to update the report definition. For example, you can add or create new layouts, update the report properties, or change the default parameter values. See the "When Creating a New Report" section in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher* for information on using the report editor.
- **Edit Layout** enables you to update the layout you are viewing. If the layout was created using BI Publisher's **Layout Editor**, then the Layout Editor launches in the browser. See the "Creating BI Publisher Layout Templates" section in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*. If the layout is based on another supported template type (such as RTF, PDF, or Excel) then you are prompted to save the template file. You can then open it in the appropriate application.
- **Export** exports the report to the default application for the output type you select (for example: Adobe Acrobat for PDF output or Microsoft Excel for Excel output).
- **Send** enables you to schedule the report for immediate delivery to an e-mail address, printer, or other destination.

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

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

- **Schedule** creates a job to run and distribute the report. See [Section 4.1, "Navigating to the Schedule Report Job Page."](#)
- **Jobs** enables you to view and manage currently scheduled jobs for this report. See [Section 5.1, "About the Manage Report Jobs Page."](#)
- **Job History** enables you to view completed and running report jobs. See [Section 6.1, "Viewing Report Job History and Saved Output."](#)
- **Republish from History** enables you to select a previously scheduled, completed job and specific output for viewing in the report viewer.
- **Analyzer** enables you to create ad hoc pivot views of the data using the **Online Analyzer**. See [Section 3.4, "Creating an Ad Hoc Pivot Table with the Analyzer."](#)
- **Analyzer for Excel** exports the report data to Microsoft Excel and enables you to manipulate the report using BI Publisher's plug-in for Excel. See [Section 3.7, "Using the Analyzer for Excel."](#)
- **Share Report Link** enables you to generate a link that you can copy and reuse, based on the report that you are currently viewing. When you select an option, a dialog displays the URL to the report. You can control what the URL displays as follows:
 - **Current Page** displays the current page as shown.
 - **No Header** displays the current report without the BI Publisher logo, tabs, or navigation path.
 - **No Parameters** displays the current report without the header or any parameter selections. The Actions menu, Export, and View Report menus are still available.
 - **Document Only** displays the URL to the current report document only. No other page information or options are displayed.

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

3.4 Creating an Ad Hoc Pivot Table with the Analyzer

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

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

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

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

This topic contains two procedures:

- [Section 3.5, "Creating an Interactive Pivot Table"](#)
- [Section 3.6, "Saving the Interactive Pivot Table as a Layout"](#)

3.4.1 Limitations of the Online Analyzer

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

3.4.2 Accessing the Online Analyzer

To access the Online Analyzer:

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

3.4.3 About the Online Analyzer Toolbar

The Analyzer toolbar enables you to perform the following functions:

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

3.5 Creating an Interactive Pivot Table

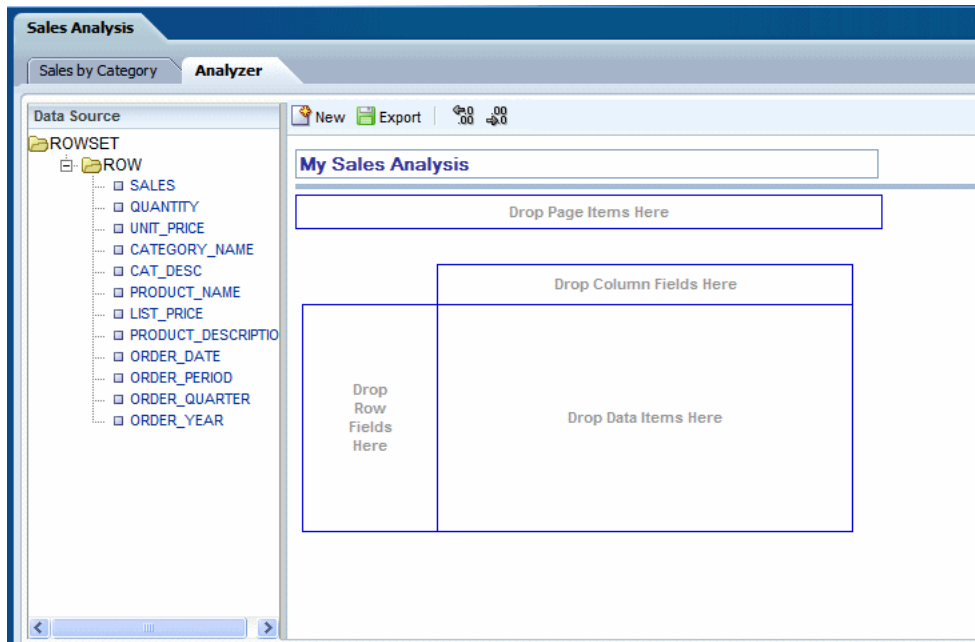
This procedure describes how to create an interactive pivot table using the Online Analyzer.

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

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

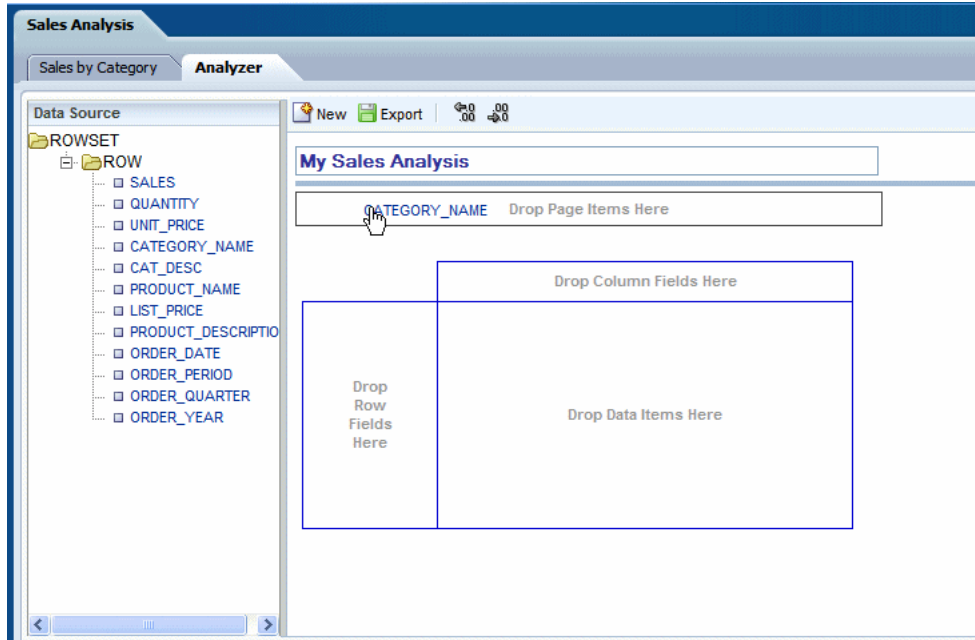
The Analyzer interface displays the list of data fields on a pane and an empty pivot table structure on the adjacent pane, as shown in [Figure 3-9](#).

Figure 3–9 Analyzer Interface



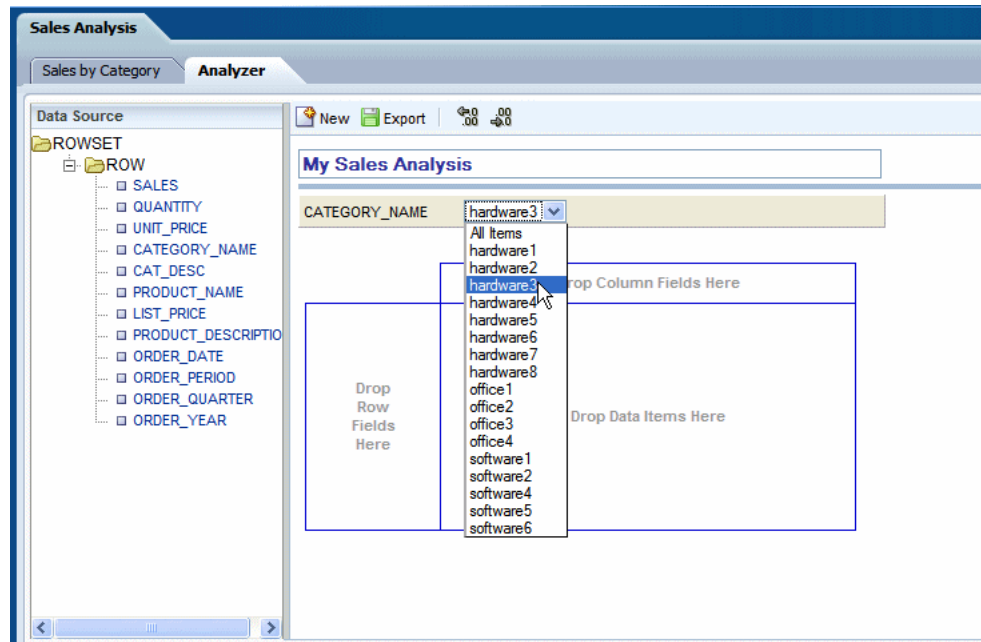
2. To filter by `CATEGORY_NAME`, drag the item to the Page Items region, as shown in [Figure 3–10](#).

Figure 3–10 Dragging Item to the Page Items region



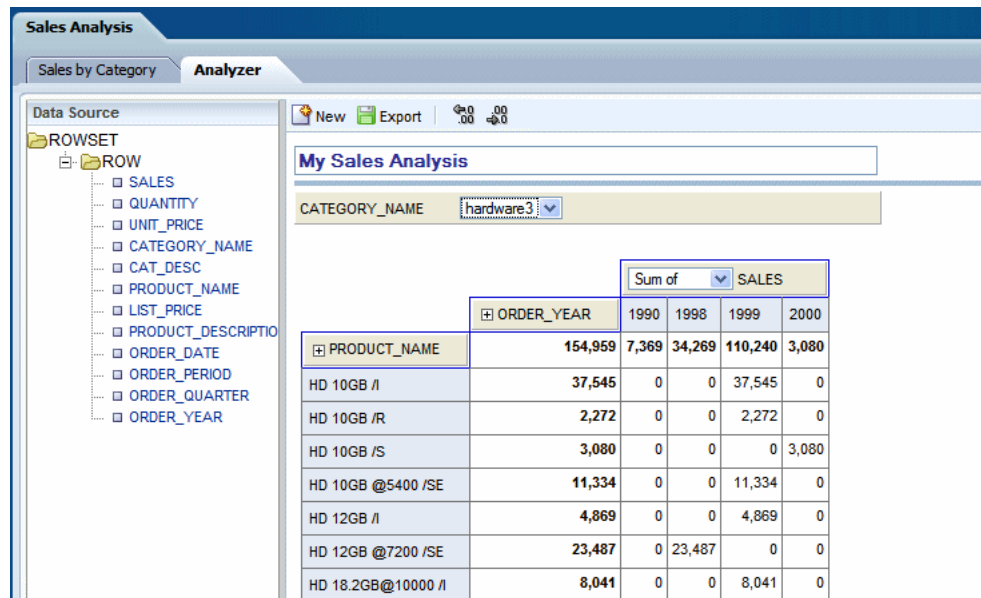
Now you can choose a value from the `CATEGORY_NAME` list to filter the page data as shown in [Figure 3–11](#).

Figure 3–11 Filtering the Page Data



3. To view product sales by year, drag `PRODUCT_NAME` into the Row Field area, and drop `ORDER_YEAR` into the Column Field area. Drop the `SALES` data into the table body area, as shown in Figure 3–12.

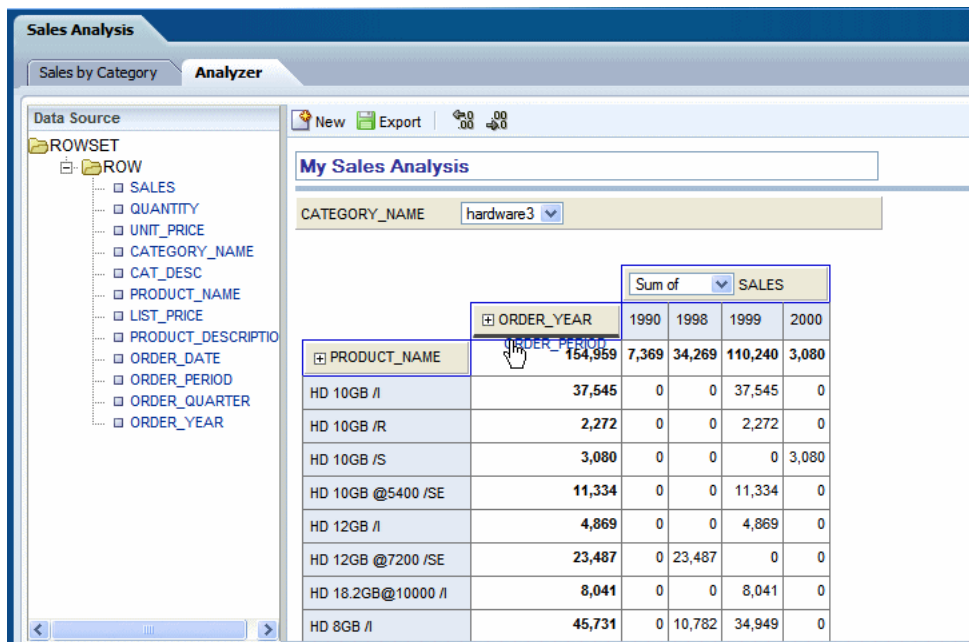
Figure 3–12 Viewing Product Sales by Year



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

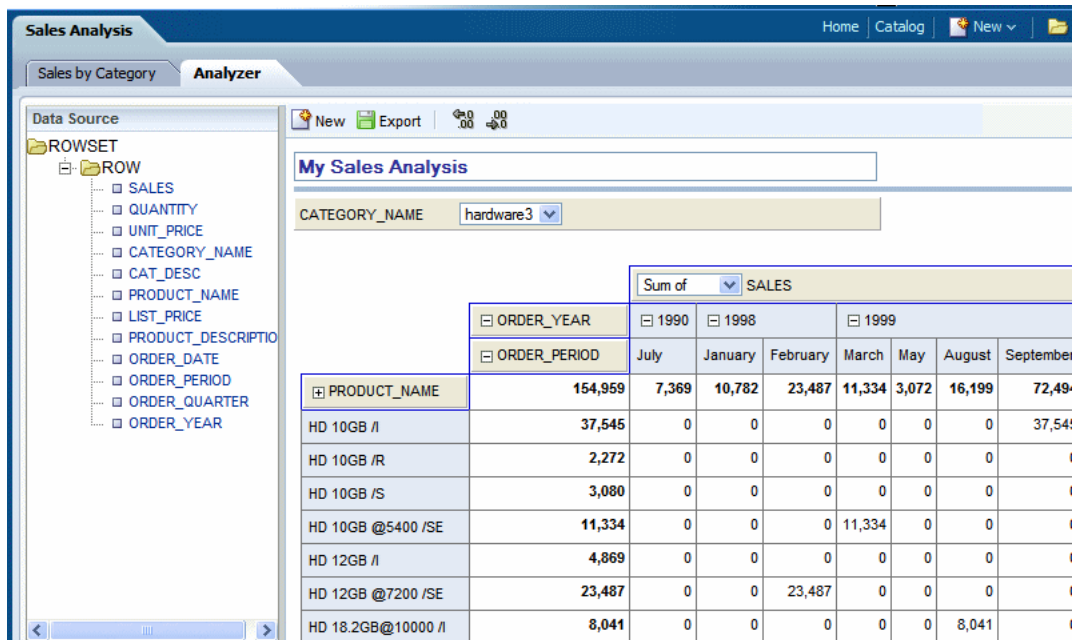
4. Add the dimension of `ORDER_PERIOD` to the table by dragging the data item over the `ORDER_YEAR` as shown in Figure 3–13.

Figure 3–13 Adding the ORDER_PERIOD



- Now you can click the ORDER_YEAR to open it up to display each ORDER_PERIOD total. Click again to close the item and view only the ORDER_YEAR total, as shown in Figure 3–14.

Figure 3–14 Viewing Totals



3.6 Saving the Interactive Pivot Table as a Layout

You can save the pivot table as a layout for your report by exporting it and saving it as a BI Publisher layout. The export command saves the pivot table as the BI Publisher layout type (.xpt). It then has all the features and properties of a BI Publisher layout.

To save the pivot table as a layout:

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

3.7 Using the Analyzer for Excel

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

You can use the Analyzer for Excel if you meet the following prerequisites:

- Install a supported version of Microsoft Excel. See "[System Requirements and Certification](#)" for the most up-to-date information on supported hardware and software.
- Download and install the Analyzer for Excel from the Home Page: In the **Get Started** region, click **Download BI Publisher Tools** and then click **Analyzer for Excel**.
- Install Microsoft .NET Framework 3.0 or later

If not installed on the computer, you are prompted to download it the first time you use the Analyzer for Excel.

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

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

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

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

3.7.1 Features

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

The Analyzer for Excel enables you to do the following:

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

3.7.2 Launching the Analyzer for Excel

To launch the Analyzer for Excel:

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

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

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

You can now manipulate the report data in Excel.

If the report has parameters, the parameter fields are displayed at the top of the worksheet, but you must log in to apply new parameter values. See the Analyzer for Excel help, or [Section 3.8, "Using the BI Publisher Menu."](#)

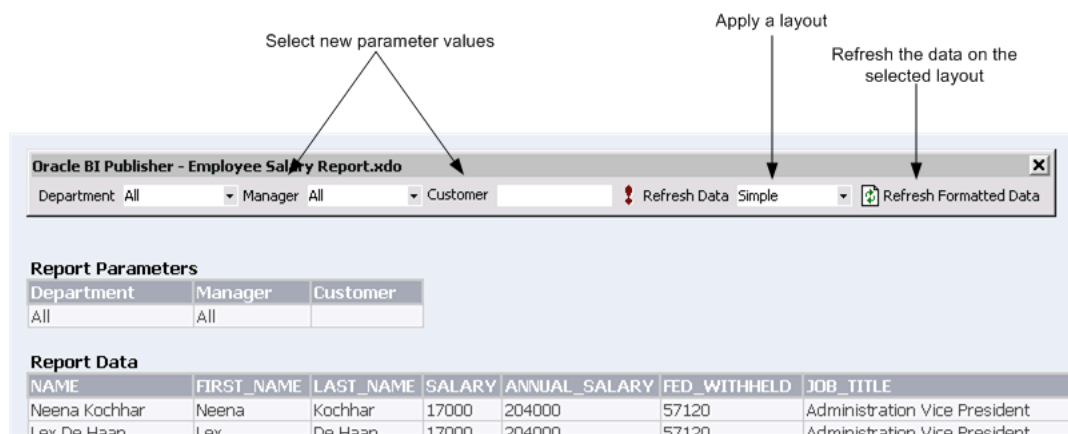
3.8 Using the BI Publisher Menu

You must log in to enable all the menu commands.

Login - enables you to log in to BI Publisher. See [Section 3.10, "Logging in Through Excel."](#)

Show Report Parameters - displays the updatable parameters and available layouts for the report in the Analyzer for Excel Toolbar, as shown in [Figure 3–15](#).

Figure 3–15 Analyzer for Excel Toolbar



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

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

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

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

Update Excel Template - If you have edited the layout and want to save the changes, then use this option to upload the updated layout to the report definition in the BI Publisher catalog.

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

Add as New Excel Template - Use this option to upload your layout and save it to the report definition.

View Report Online - Launches the report viewer page.

Browse for Reports Online - This feature enables you to select reports from the BI Publisher catalog and open them directly in Excel. You can either download the report data to Excel, or download an existing layout to update it or to use as a starting point for a new layout. See [Section 3.9, "About the Open Template Dialog."](#)

Preferences - Select the locale and proxy settings if required.

3.9 About the Open Template Dialog

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

Workspace

Select Oracle BI Publisher to browse the catalog.

Reports Pane

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

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

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

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

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

3.10 Logging in Through Excel

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

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

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

Creating Report Jobs

This chapter describes how to use the BI Publisher scheduler to create and monitor report jobs. Report jobs can be scheduled to run at defined intervals and to be delivered to multiple destinations.

This chapter includes the following sections:

- [Section 4.1, "Navigating to the Schedule Report Job Page"](#)
- [Section 4.2, "Setting General Options"](#)
- [Section 4.3, "Setting Output Options"](#)
- [Section 4.4, "Defining the Schedule for a Job"](#)
- [Section 4.5, "Configuring Notifications"](#)
- [Section 4.6, "Submitting and Monitoring a Job"](#)
- [Section 4.7, "Create a Job from an Existing Job"](#)
- [Section 4.8, "Creating a Bursting Job"](#)
- [Section 4.9, "Advanced Topics"](#)

4.1 Navigating to the Schedule Report Job Page

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

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

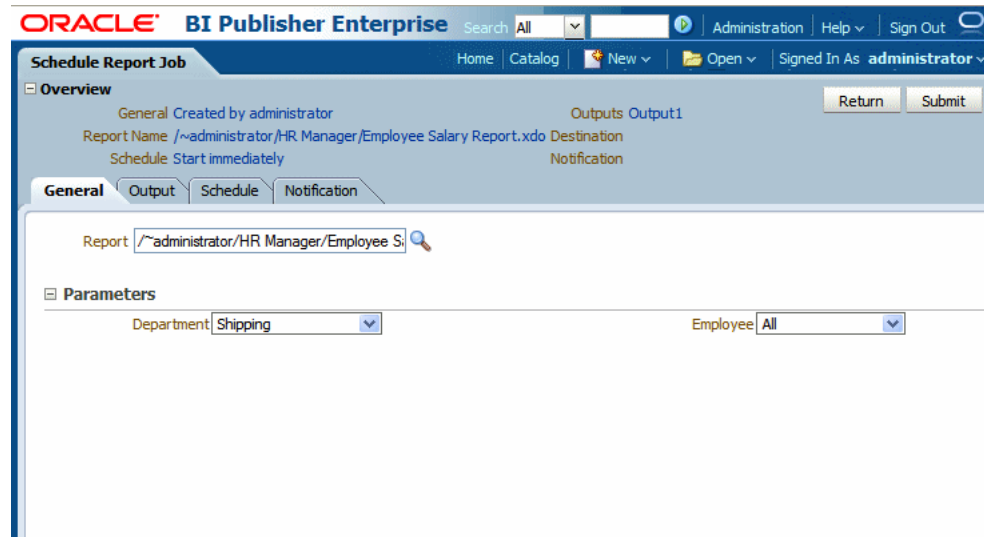
- From the Home page: From the **Create** region select **Report Job**
- From the catalog: Navigate to the report you want to schedule, then select the **Schedule** link.
- From the Report Viewer: Click **Actions** and then click **Schedule**.
- From the global header: Click **New** and then click **Report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

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

4.2 Setting General Options

The **General** tab is shown in [Figure 4-1](#).

Figure 4–1 General Tab



Enter the following general information for the report job:

Table 4–1 General Information for the Report Job

Field	Description
Report	If you accessed the schedule page from the report, this field displays the report path and name. If you accessed the schedule page from the Create region or the global header, click Choose to browse for and select the report to schedule.
Parameters	Any parameters defined for the report are displayed. Enter the values for this job. Note: For date parameters, you can use an expression to increment the date for each run. See Section 4.9.1, "Incrementing Date Parameters."

4.3 Setting Output Options

The **Output** tab has two regions: **Output** and **Destination**. Each scheduled job can have multiple output files with distinct characteristics. Each output file can have multiple destinations. The **Output** tab is shown in [Figure 4–2](#).

Figure 4–2 Output Tab

The options are described in [Table 4–2](#):

Table 4–2 Output Tab Options

Option	Description
Use Bursting Definition to Determine Output and Delivery Destination	Enable this option to use the report bursting definition for output and delivery. Once selected, all other fields on this page are disabled for selection. Note that this box is only available if the report has a bursting definition. For more information on report bursting, see Section 4.8, "Creating a Bursting Job."
Make Output Public	Enable this option to make this job output available to all users with permission to access this report. Users with access can view the report from the Report Job History page.
Save Data for Republishing	Enable this option to save the XML data that is generated for this job. Access the saved data from the Report Job History page (see Section 6.1, "Viewing Report Job History and Saved Output") where you can republish it, selecting a new layout and output options.

4.3.1 Adding Outputs

The **Output Table** enables you to create multiple report documents for one or more layouts using a combination of output format, locale, time zone, and calendar. To add outputs for this job, click the **Add** toolbar button to add an entry to the table. The fields are described in [Table 4–3](#).

Table 4–3 Output Table Fields

Field	Description
Name	Enter a name for this output.

Table 4–3 (Cont.) Output Table Fields

Field	Description
Layout	Select the layout to apply to this output.
Format	Select the document output format. Output format is the type of document that is generated, for example, PDF, HTML, or Excel. The options available here are specified in the report definition.
Locale	Select the language-territory combination for this report output. This field defaults to the Report Locale defined in the user Preferences (see Section 2.2, "Setting My Account Preferences and Viewing My Groups"). Note: If the layout does not have an available translation for the selected locale, BI Publisher applies a locale fallback logic to select the layout. For more information, see "Locale Selection Logic" in <i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i> . The appropriate number and date formatting are applied independently of the template translation.
Timezone	Select the time zone to use for this report output. The time zone defaults to the time zone defined in the user Preferences (see Section 2.2, "Setting My Account Preferences and Viewing My Groups").
Calendar	Select the calendar to use for this output.
Save Output	Select this box to save the report output. You must select this option to view your report from the Report Job History page.

4.3.2 Adding Destinations

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

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

If you do not require a destination, leave this region blank. Select **Save Output** to view the output from the **Report Job History** page. See [Section 6.1, "Viewing Report Job History and Saved Output."](#)

For each destination you add, select from the Output list which documents to send to this destination, as shown in [Figure 4–3](#).

Figure 4-3 Output list

Destination

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

Destination Type: Email Add Destination

Email

Output: All Output1 Output2

To:

Cc:

Reply to:

Subject:

Message:

Enter the appropriate fields for each destination type:

4.3.2.1 Email

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

4.3.2.2 Printer

Select the **Printer Group** and the **Printer**, enter the **Number of copies**, and select Single sided or Double sided (the printer must support duplex printing for this option to take effect). Optionally select the printer **Default Tray** from which to print the report, and the **Print Range** pages.

4.3.2.3 Fax

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

4.3.2.4 FTP

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

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

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

To assign a file name dynamically using a date expression, see [Section 4.9.2, "Defining a Destination File Name Dynamically Using a Date Expression."](#)

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

4.3.2.5 Web Folder

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

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

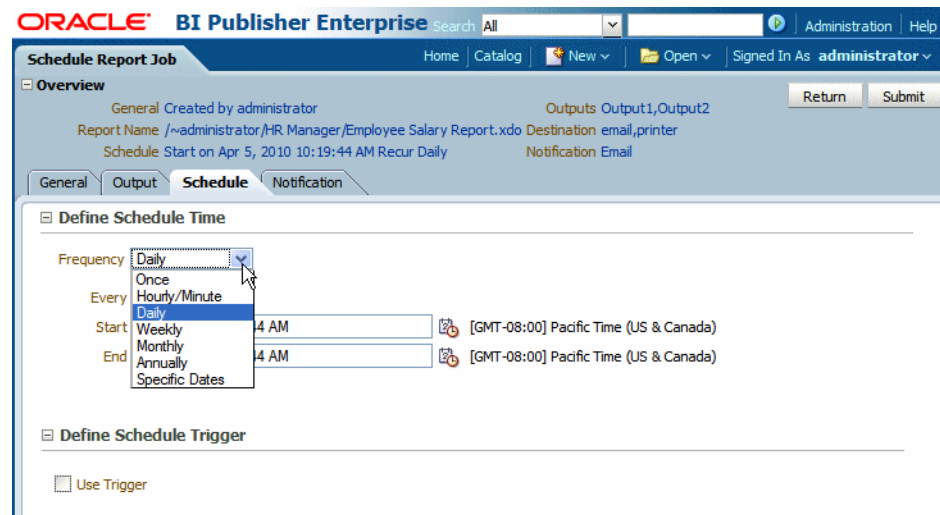
Remote File Name - enter the file name for BI Publisher to assign to the delivery document on the remote server (example: myreport.pdf).

To assign a file name dynamically using a date expression, see [Section 4.9.2, "Defining a Destination File Name Dynamically Using a Date Expression."](#)

4.4 Defining the Schedule for a Job

Use the **Schedule** tab to define when to execute the report job. The scheduler supports defining a simple recurrence pattern as well as conditionalizing the report job submission based on a condition defined in a report trigger. The **Schedule** tab is shown [Figure 4-4](#).

Figure 4-4 *Schedule Tab*



4.4.1 Defining a Recurrence Pattern

Select from the following recurrence pattern options:

4.4.1.1 Once

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

4.4.1.2 Hourly/Minute

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

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

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

4.4.1.3 Daily

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

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

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

4.4.1.4 Weekly

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

Tuesday and Thursday. To run the report every other Wednesday, enter 2, and select Wednesday.

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

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

4.4.1.5 Monthly

Every - select each month that the job executes.

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

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

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

4.4.1.6 Annually

Every - enter the increment in years that the job executes.

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

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

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

4.4.1.7 Specific Dates

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

4.4.2 Enabling a Schedule Trigger

A schedule trigger tests for a condition and if the condition returns a result, the job executes. If the trigger condition is not met, the job instance is skipped. Some examples of when you might use a schedule trigger are:

- A report job should only run after the successful completion of an extract, transfer, and load process
- Account management wants a report triggered if any of the receipts from the previous day exceed a specified amount
- Human resources needs a report only when new hires entered the system in the previous week

Triggers are set up in the data model and then they are available for selection from the **Schedules** tab. You can associate a schedule trigger that is defined in any data model; the trigger does not have to be defined in the data model of the report that is being run. One trigger per report job is supported.

For more information about setting up schedule triggers in a data model, see "Adding Event Triggers" in the *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher*.

To enable a schedule trigger:

1. Select **Use Trigger**.

2. Choose the Data Model that defines the schedule trigger. When the data model is selected, the Trigger list displays the schedule triggers defined in the data model.
3. Select the Trigger from the list.
4. If the schedule trigger includes parameters, enter values as appropriate.

Figure 4–5 shows a schedule trigger with one parameter enabled for a report job.

Figure 4–5 Schedule Trigger Enabled for a Report Job

Define Schedule Trigger

Use Trigger

A schedule trigger allows you to conditionally execute an occurrence of a job. When the schedule time occurs, the schedule trigger is checked. If the schedule trigger returns data, the job will proceed. If no data is returned the occurrence of that job is skipped.

Data Model Use Data Model specified in the report

Trigger

Parameters

Salary

4.5 Configuring Notifications

A notification is a message that a job has finished processing. BI Publisher supports the following notification statuses:

- Report completed
- Report completed with warnings
- Report failed
- Report skipped

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

Note: Configure the delivery e-mail server and HTTP server in the Administration Delivery Configuration page. For more information, see "Configuring Delivery Options" in *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

4.5.1 Adding Notifications

Use the **Notification** tab to configure notifications for a job, as shown in Figure 4–6.

Figure 4–6 Notification Tab

The screenshot shows the Oracle BI Publisher Enterprise interface for scheduling a report job. The 'Notification' tab is active, displaying configuration options for email and HTTP notifications. The email notification is selected, and the user has specified the email address and the conditions under which notifications should be sent.

4.5.1.1 Email

To enable an e-mail notification:

Select the report completion statuses for which to send the notification, and enter a comma-separated list of addresses.

4.5.1.2 HTTP

To enable an HTTP notification:

Select the report completion statuses for which to send the notification. Select the server to which to send the HTTP notification. Enter the user name and password for the server, if required.

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

4.6 Submitting and Monitoring a Job

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

To suspend, edit, or delete a job, navigate to the **Manage Report Jobs** page as follows: On the global header, click **Open** and then click **Report Jobs**. See [Section 5.1, "About the Manage Report Jobs Page."](#)

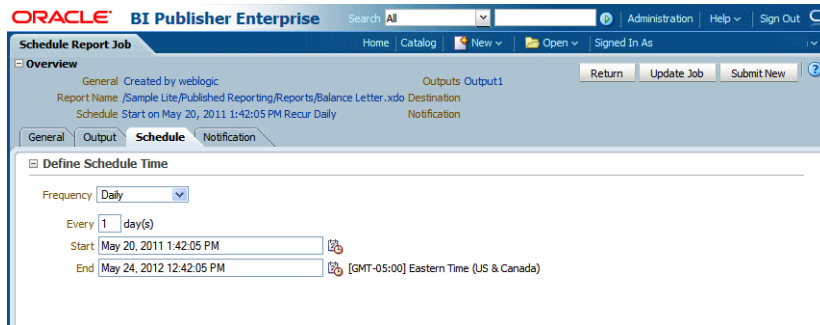
To monitor a running job or to see the results, navigate to **Report Job History** page as follows: On the global header, click **Open** and then click **Report Job History**. See [Section 6.1, "Viewing Report Job History and Saved Output."](#)

4.7 Create a Job from an Existing Job

Create a new job from an existing job in the Manage Report Jobs page:

1. Navigate to the **Manage Report Jobs** page: On the global header, click **Open** and then click **Report Jobs**.

2. Use the filter criteria to find the existing job. In the results table, click the **Edit** icon to open the job for editing.
3. Enter the details for the new job definition. When finished, click **Submit as New** as shown in the following figure:



4. Enter a name for the new job and click **Submit As**.

For more information about editing jobs in the **Manage Report Jobs** page, see [Section 5.9, "Editing Jobs."](#)

4.8 Creating a Bursting Job

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

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

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

4.9 Advanced Topics

This section includes the following topics:

- [Section 4.9.1, "Incrementing Date Parameters"](#)
- [Section 4.9.2, "Defining a Destination File Name Dynamically Using a Date Expression"](#)

4.9.1 Incrementing Date Parameters

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

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

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

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

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

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

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

For this example, to capture data from the previous week, each time the schedule runs, enter the following in the report's date parameter fields:

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

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

4.9.2 Defining a Destination File Name Dynamically Using a Date Expression

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

The supported date expressions are described in [Table 4-4](#).

Table 4-4 Supported Date Expressions

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

Table 4–4 (Cont.) Supported Date Expressions

Expression	Description
%l	Displays milliseconds in three digits: 000 - 999

4.9.2.1 Examples

Creating a File Name That Appends a Date

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

myfile_01_11_2010.pdf

Enter the following:

myfile_%d_%m_%y.pdf

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

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

01_01_2010_myfile_22_57.pdf

Enter the following:

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

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

Viewing and Managing Report Jobs

This chapter describes how to view and manage report jobs submitted to the BI Publisher scheduler.

This chapter includes the following topics:

- [Section 5.1, "About the Manage Report Jobs Page"](#)
- [Section 5.2, "Viewing Jobs for a Specific Report"](#)
- [Section 5.3, "Searching for Report Jobs"](#)
- [Section 5.4, "Setting the Time Zone for Viewing Jobs"](#)
- [Section 5.5, "Viewing Job Details"](#)
- [Section 5.6, "Pausing Jobs"](#)
- [Section 5.7, "Resuming Jobs"](#)
- [Section 5.8, "Deleting Jobs"](#)
- [Section 5.9, "Editing Jobs"](#)
- [Section 5.10, "Refreshing the Manage Report Jobs Page"](#)

5.1 About the Manage Report Jobs Page

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

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

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

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

- From the catalog: Navigate to the report in the catalog and then click **Jobs**
- From the report viewer page: Click **Actions** and then click **Jobs**

[Figure 5–1](#) shows the **Manage Report Jobs** page.

Figure 5–1 Manage Report Jobs Page

The screenshot displays the Oracle BI Publisher Enterprise interface for managing report jobs. At the top, there is a navigation bar with 'ORACLE BI Publisher Enterprise' and a search bar. Below the navigation bar, the page title is 'Manage Report Jobs'. A status bar indicates the last refresh time and the selected time zone. The main area contains a search and filter section with various criteria and a table of report jobs.

Report Job Name	Report Name	Status	Start Time	End Time	Frequency	Owner	Scope	Edit	History
Monthly Department Expenses	/Samples/Financials/Departmental Expenses.xdo	Active	Oct 30, 2011 3:35:25 PM	Nov 4, 2015 3:35:25 PM	Repeats Monthly	weblogic	Private		History
Monthly Sales Review	/Samples/Executive/Revenue By Region.xdo	Active	Oct 30, 2011 3:28:15 PM	Nov 4, 2012 3:28:15 PM	Repeats Monthly	weblogic	Private		History
Weekly Sales Review	/Samples/Executive/Revenue By Region.xdo	Paused	Oct 30, 2011 3:32:52 PM	Nov 4, 2012 3:32:52 PM	Repeats Weekly	weblogic	Private		History
Weekly Sales Review	/Samples/Executive/Revenue By Region.xdo	Active	Oct 30, 2011 3:28:15 PM	Nov 4, 2011 2:28:15 PM	Repeats Weekly	weblogic	Private		History
Quarterly Income	/Samples/Executive/Quarterly Income Statement...	Active	Oct 30, 2011 3:26:44 PM	Nov 4, 2012 6:26:44 PM	Repeats Monthly	weblogic	Private		History
Daily Updates	/Samples/Executive/Sales Dashboard with News....	Active	Oct 30, 2011 3:24:19 PM	Oct 30, 2012 6:24:19 PM	Repeats Daily	weblogic	Private		History

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

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

5.2 Viewing Jobs for a Specific Report

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

- Report Name** - the name of the report from which you launched the Manage Report Jobs page
- Owner** - equals your user ID
- Scope** - equals All (public and private jobs)
- Status** - equals All (active and suspended jobs)

Use the following procedure to further filter the results.

5.3 Searching for Report Jobs

To search for report jobs:

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

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

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

Possible status values are:

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

5.4 Setting the Time Zone for Viewing Jobs

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

To set the time zone for viewing jobs:

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

5.5 Viewing Job Details

To view job details:

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

5.6 Pausing Jobs

To pause a job:

1. Select the job by clicking anywhere in the table row that lists the job information (do not click the job name link). You can select multiple jobs by pressing Ctrl + Shift and then clicking the additional rows. Deselect a row by clicking it again.
2. Click the **Pause** button. The status of the job changes to Paused.

5.7 Resuming Jobs

To resume a job:

1. Select the job by clicking anywhere in the table row of the paused job (do not click the job name link). You can select multiple jobs by pressing Ctrl + Shift and then clicking the additional rows. Deselect a row by clicking it again.
2. Click the **Resume** button. The status of the job changes to Active.

5.8 Deleting Jobs

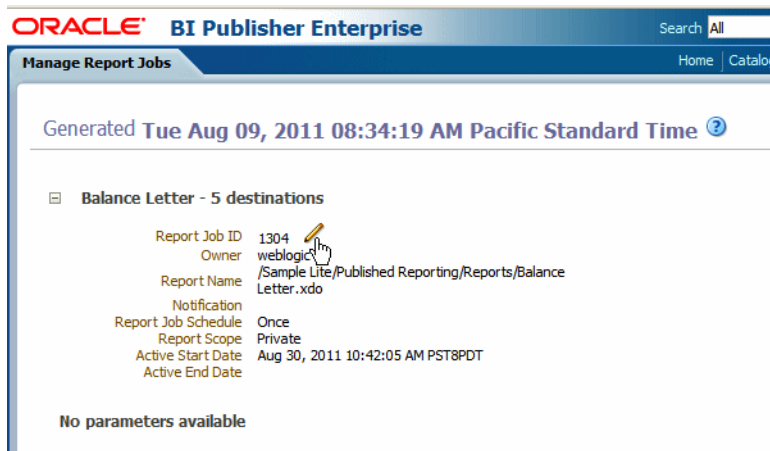
To delete a job:

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

5.9 Editing Jobs

To edit a job:

1. Click the **Edit** icon for the job in the results table; or, click the **Report Job Name** to view the detail page for the job and then click the **Edit** icon next to the job name as shown in the following figure:



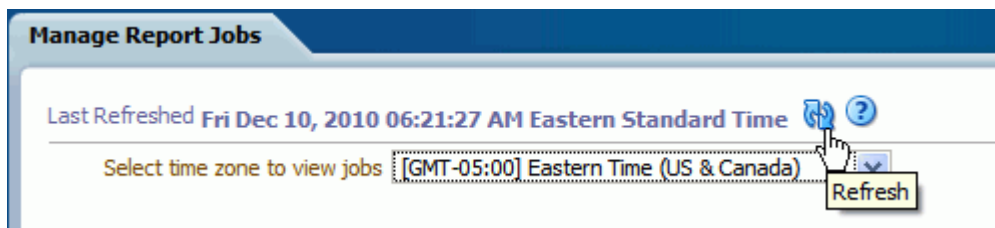
2. Edit the job details using the General, Output, Schedule, and Notification tabs.
3. Click **Update Job** to save your changes to this job; or, to save the edited job as a new job, click **Submit as New** and enter a name for the new job.

5.10 Refreshing the Manage Report Jobs Page

To refresh the Manage Report Jobs page:

1. To refresh the Manage Report Jobs page, click the **Refresh** button at the top of the page, as shown in [Figure 5-2](#).

Figure 5-2 Refreshing Manage Report Jobs Page



Viewing and Managing Report History

This chapter describes the BI Publisher job history features including republishing data from history, sending the job output to new destinations, and getting error information on report jobs that did not complete successfully.

This chapter includes the following sections:

- Section 6.1, "Viewing Report Job History and Saved Output"
- Section 6.2, "Viewing Job History for a Specific Report"
- Section 6.3, "Searching for Report Job History"
- Section 6.4, "Viewing Details of a Job History"
- Section 6.5, "Downloading Data from a Report Job"
- Section 6.6, "Republishing a Report from History"
- Section 6.7, "Sending an Output to a New Destination"
- Section 6.8, "Monitoring Running Jobs"
- Section 6.9, "Canceling a Running Job"
- Section 6.10, "Getting Error and Warning Information for Reports"
- Section 6.11, "Deleting a Job History"
- Section 6.12, "Refreshing the Report Job History Page"

6.1 Viewing Report Job History and Saved Output

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

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

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

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

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

Figure 6–1 shows the **Report Job History** page.

Figure 6–1 Report Job History Page

ORACLE BI Publisher Enterprise Search All Administration Help Sign Out

Report Job History Home Catalog New Open Signed In As administrator

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

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

Filters

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

Report Path Contains End Processing Equals Or Earlier Scope All Histories

Schedule Context Contains Status All

Search Reset

Report Job Histories [33 Report Output Fetched]

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

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

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

6.2 Viewing Job History for a Specific Report

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

- Report Path** - equals the path to the report from which you launched the Report Jobs History page
- Start Processing** - equals to or later than one week ago.
- Owner** - equals your user ID
- Scope** - equals All Histories (Possible values for scope are: Public and Private job histories)

- **Status** - equals All (Possible values for status are: Success, Failed, Running, Has output errors, Canceled, Cancelling, Has delivery errors, and Skipped)

Use the following procedure to further filter the results.

6.3 Searching for Report Job History

To search for report job history:

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

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

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

6.4 Viewing Details of a Job History

To view details of a job history:

1. Click the **Report Job Name** to view a detail page for the job, as shown in [Figure 6-2](#).

Figure 6–2 Job Detail Page

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

General Information

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

Report Parameters

Department 90
Employee All

Output & Delivery

XML Data ✔ Republish

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

- To view delivery information for each output, click the expand icon next to the output name, as shown in [Figure 6–3](#).

Figure 6–3 Delivery Information

Output & Delivery

XML Data ✔ Republish

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

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

6.5 Downloading Data from a Report Job

For the data to be available, the **Save Data for Republishing** option must be enabled when the job is created. For information on setting this option, see [Section 4.3, "Setting Output Options."](#)

To download data from a report job:

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

6.6 Republishing a Report from History

For the data to be available, the **Save Data for Republishing** option must be enabled when the job is created. For information on setting this option, see [Section 4.3, "Setting Output Options."](#)

To republish a report from history:

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

6.7 Sending an Output to a New Destination

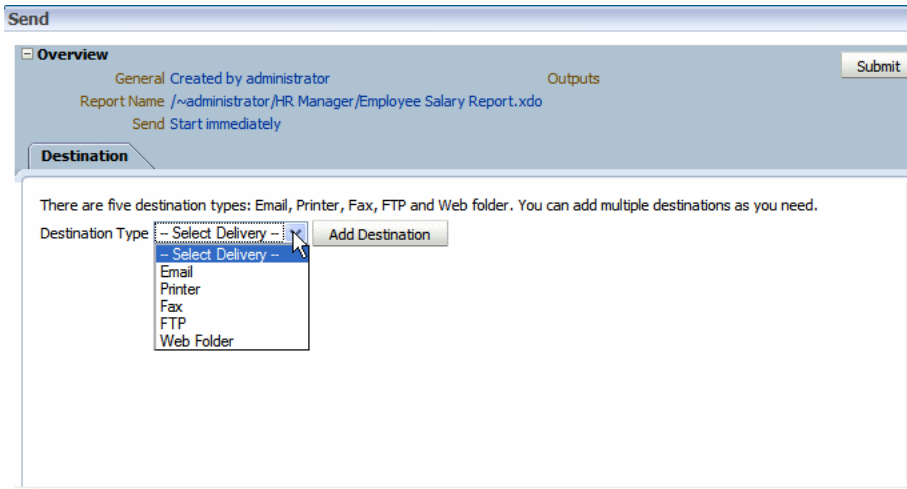
For the output to be available from the history table, the **Save Output** option must be enabled when the job is created. For information on setting this option, see [Section 4.3, "Setting Output Options."](#)

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

To send an output to a new destination:

1. Click the **Report Job Name** to view the detail page for the job.
2. From the **Output & Delivery** region, locate the output that you want to send to a new destination and click **Send**. This launches the **Send** dialog, as shown in [Figure 6-4](#).

Figure 6–4 Send Dialog

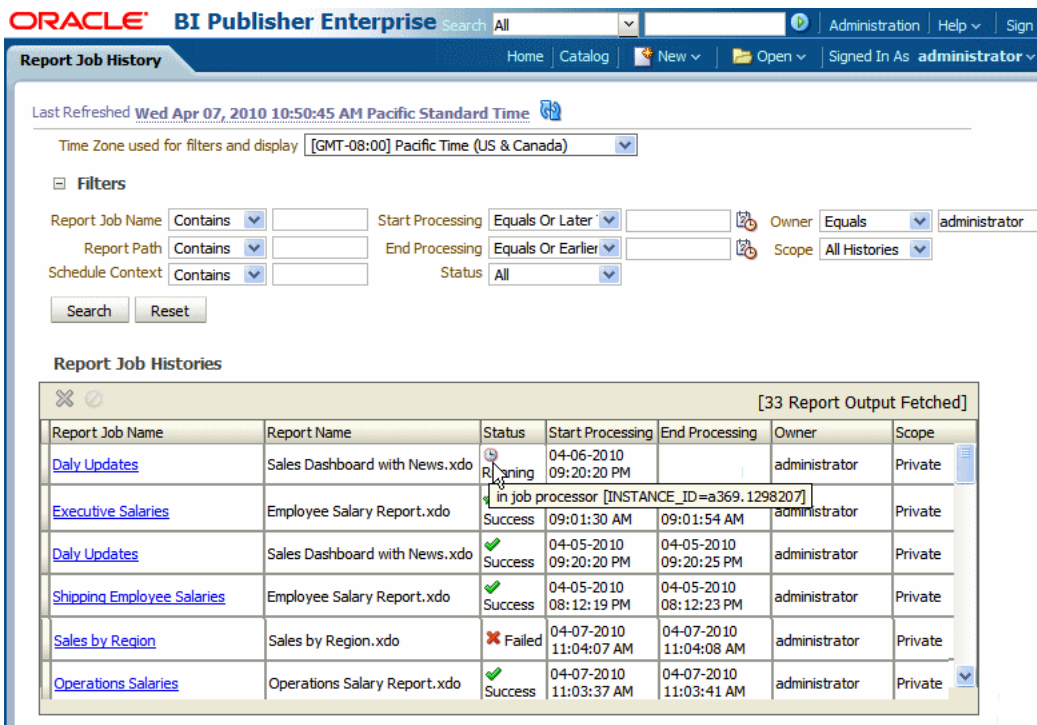


3. Select the delivery type and click **Add Destination**. Enter the appropriate fields for your delivery type.
4. When finished adding destinations, click **Submit**.

6.8 Monitoring Running Jobs

While a job is in running status, you can monitor the stages of the report processing. To view the status, rest your cursor over the Running status indicator in the results table. The status displays with the instance ID of the cluster instance handling the processing. The status is shown in [Figure 6–5](#).

Figure 6–5 Job Status



Note that the status does not automatically update while you are viewing the page. To check for updates to the status, refresh the page.

Table 6–1 lists the processing stages of a job.

Table 6–1 Processing Stages of Jobs

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

6.9 Canceling a Running Job

To cancel a running job:

1. Click anywhere within the table row for the report job to select it (except the job name link). You can select multiple jobs by pressing Ctrl + Shift and then clicking the additional rows. Deselect a row by clicking it again. Note that a job must be in **Running** status to cancel it.

- Click the **Cancel running jobs** icon at the top of the table, as shown in [Figure 6-6](#).

Figure 6-6 Canceling Running Jobs

Report Job Histories

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

- Click OK on the confirmation dialog.

6.10 Getting Error and Warning Information for Reports

If a report job fails or completes with warnings, you can view the message by resting the cursor over the error or warning status indicator in the results table. The message displayed as shown in [Figure 6-7](#)

Figure 6-7 Sample Error Message

Report Job Histories

Report Job Name	Report Name	Status	Start Processing	End Processing	Owner	Scope
Sales by Region	Sales by Region.xdo	Success	04-18-2010 09:20:19 PM	04-18-2010 09:20:21 PM	administrator	Private
Weekly Sales Report	Sales by Region.xdo	Failed	04-18-2010 09:08:53 PM	04-18-2010 09:08:54 PM	administrator	Public
Daily Updates	Sales Dashboard with News.xdc	BurstingJobprocessor.execute exception:Error getting data file or control file::Error getting bursting control xml.oracle.xdo.XDOException: oracle.xdo.XDOException: Could not get data source connection for: ABETAoracle.xdo.XDOException: Could not get data source connection for: ABETA at oracle.xdo.online.data.ClassicDataProcessor.process(ClassicDataProcessor.java:161) at oracle.xdo.servlet.ReportModelContextImpl.getReportXMLData(ReportModelContextImpl.java:161)				
Operations Salaries	Operations Salary Report.xdo	Success	04-14-2010 09:20:20 PM	04-14-2010 09:20:25 PM	administrator	Private
Executive Salaries	Employee Salary Report.xdo	Success	04-14-2010 09:20:20 PM	04-14-2010 09:20:25 PM	administrator	Private
Daily Updates	Sales Dashboard with News.xdc	Success	04-14-2010 09:20:20 PM	04-14-2010 09:20:25 PM	administrator	Private

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

For details, see the "Viewing Log Messages" section in *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

6.11 Deleting a Job History

To delete a job history:

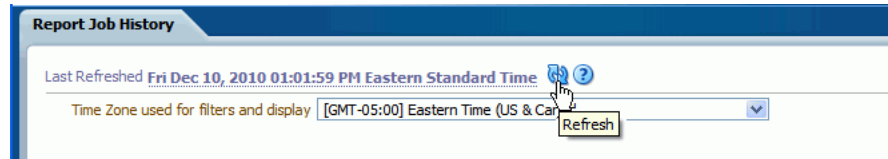
- Click anywhere within the table row for the report job to select it. You can select multiple rows.
- Click the delete icon at the top of the table.
- Click **OK** on the confirmation dialog.

6.12 Refreshing the Report Job History Page

To refresh the report job history page:

1. To refresh the **Report Job History** page, click the **Refresh** button at the top of the page, as shown in [Figure 6–8](#).

Figure 6–8 Refreshing Report Job History



Managing Objects in the BI Publisher Catalog

This chapter describes how to manage the report components in the BI Publisher catalog. It includes setting permissions, downloading and uploading reports and folders, and moving objects in the catalog.

This chapter includes the following sections:

- [Section 7.1, "Overview of the Catalog"](#)
- [Section 7.2, "Objects Stored in the Catalog"](#)
- [Section 7.3, "Creating a Folder or Subfolder"](#)
- [Section 7.4, "Performing Tasks on Catalog Objects"](#)
- [Section 7.5, "Downloading and Uploading Catalog Objects"](#)
- [Section 7.6, "Understanding the Impact of Taking Actions on Objects Referenced by Reports"](#)
- [Section 7.7, "Exporting and Importing Catalog Translation Files"](#)

7.1 Overview of the Catalog

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

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

Users can also store objects in shared folders where other users or groups can access the objects. User permissions determine which folders are available to which users. Permissions are assigned at the object-level and determine who can view, edit, and schedule objects within that folder. Your administrator creates and maintains the catalog's shared folder structure.

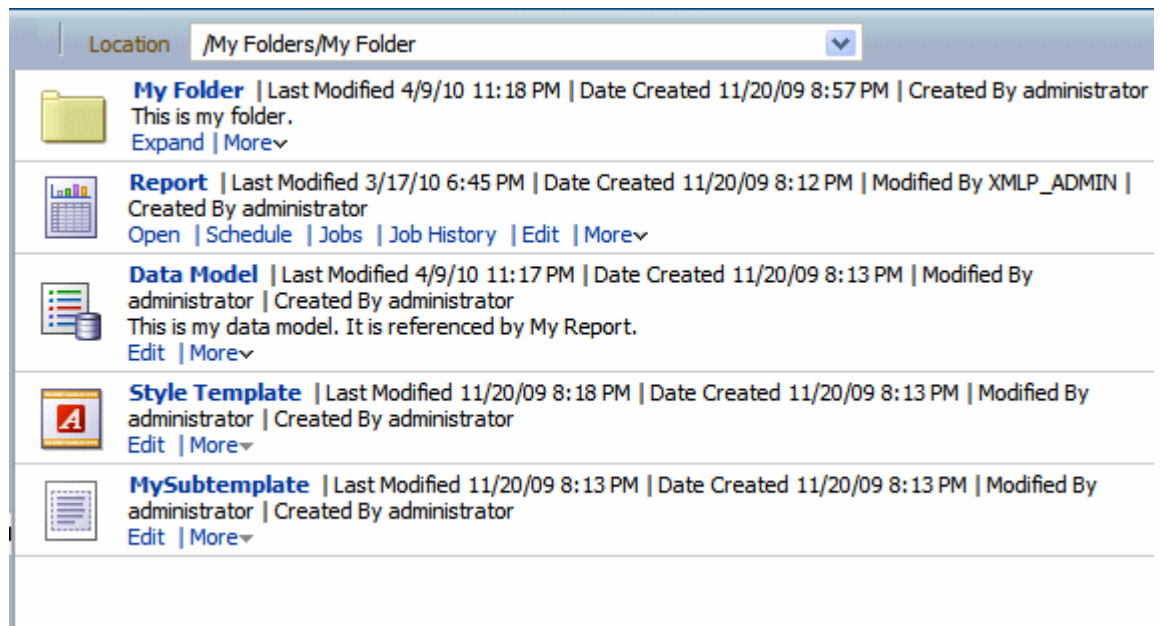
7.2 Objects Stored in the Catalog

The following objects are shown in the catalog:

- Folders
- Reports
- Data Models
- Style Templates
- Sub Templates

As shown in [Figure 7–1](#), each object has an identifying icon and lists the creation and modification information. If a description was provided for the object, that is also displayed in the catalog. Next to each object in the catalog is a list of actions you can take on the object.

Figure 7–1 *Catalog Objects and Their Icons*



See [Section 7.4, "Performing Tasks on Catalog Objects"](#) for more information.

7.3 Creating a Folder or Subfolder

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

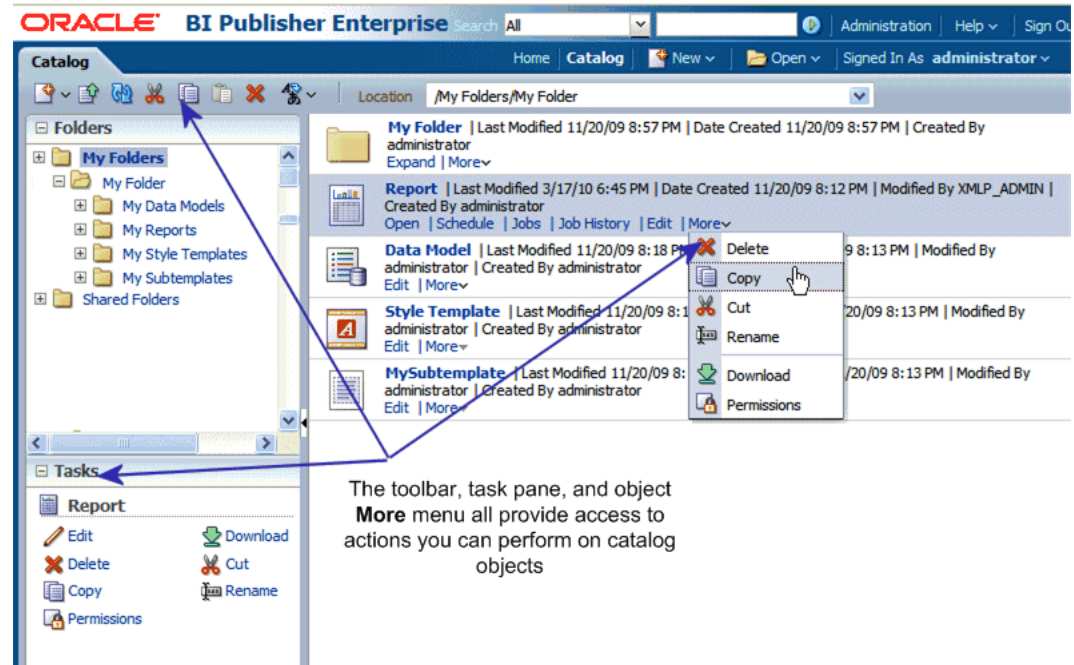
To create a folder:

1. Navigate to the desired location in the Folders pane.
2. On the catalog toolbar, click **New** and select **Folder**. The **New Folder** dialog is displayed.
3. Enter the folder name and optionally enter a description. Click **Create**.

7.4 Performing Tasks on Catalog Objects

Some tasks can be performed on objects in multiple ways: by using the links next to the object, by using the catalog toolbar, or by selecting the object and choosing the task from the Tasks region, as shown in [Figure 7-2](#):

Figure 7-2 Multiple Methods to Perform Tasks



Your access to these actions depends on the permissions granted to you by your administrator.

Task options include the following:

- **Edit** - opens the object in the appropriate editor or builder.
- **Copy** - duplicates a folder or object. To paste the object in a different folder, navigate to the folder location and click **Paste** to place the copied item in the desired folder. To paste a copy of the item into the same folder, click **Paste**. The copied object is renamed with the prefix "Copy_of_". (Note: Only one "Copy_of_" item can be pasted in the same location. Update the name before pasting additional copies of the same object.)
- **Cut** - cuts the item from the current location. To paste the object in a different folder, navigate to the folder location and click **Paste** to place the item in the desired folder.
- **Delete** - removes a folder or object that from the catalog.
- **Download** - creates an archive file of the object that you can save to a selected location. See [Section 7.5, "Downloading and Uploading Catalog Objects."](#)
- **Rename** - renames a folder or object.
- **Permissions** - sets object-level permissions. See "About Catalog Permissions" in *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher* for more information.

Folders also include the following tasks:

- **Expand** - displays the folder contents.
- **Paste** - pastes a cut or copied object into the selected folder.
- **Upload** - uploads an archived object to the folder. See [Section 7.5, "Downloading and Uploading Catalog Objects."](#)
- **Properties** - enables update of the folder description.

7.5 Downloading and Uploading Catalog Objects

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

[Table 7-1](#) lists the file extensions that BI Publisher assigns to each type of archived object when downloaded.

Table 7-1 Extensions for Archived Objects

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

Note: If BI Publisher is integrated with the Business Intelligence Enterprise Edition, then use the archive and unarchive features of the BI Presentation catalog to perform this function. See "Managing Objects in the Oracle BI Presentation Catalog" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition* for more information.

7.6 Understanding the Impact of Taking Actions on Objects Referenced by Reports

When you move, cut, rename, or delete a Data Model, a Sub Template, or a Style Template that is being used as a resource for a report, that the references to the resource are broken and the report no longer runs as expected.

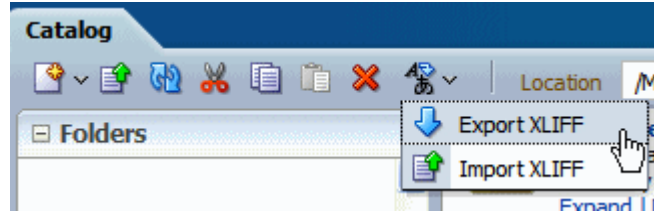
For example, if you have a report that was created with a data model that resides in a folder called My Data Models, if you move the data model to another folder, the report does not run because the report definition is expecting the data model to be in My Data Models.

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

7.7 Exporting and Importing Catalog Translation Files

For users with administrator privileges, the catalog toolbar includes the Export XLIFF and Import XLIFF function shown in [Figure 7-3](#):

Figure 7-3 Export and Import XLIFF Options



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

For more information, see the "Adding Translations for the BI Publisher Catalog and Reports" section in *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

Index

A

account settings, 2-3
Analyzer for Excel, 3-13
 downloading, 2-6
 prerequisites, 3-13

B

bar, location, 2-8
bursting
 scheduling a report to be burst, 4-10

C

catalog, 2-7
 navigation, 2-8
 searching, 2-9
changing passwords, 2-4

D

desktop tools
 Analyzer for Excel, 3-13
 downloading, 2-6
 Oracle SQL Developer, 2-6
 Template Builder for Excel, 2-6
 Template Builder for Word, 2-6
display
 setting language, 2-4

E

Excel
 installing the Analyzer for Excel, 2-6
 installing the Template Builder, 2-6
Excel Analyzer, 3-13

G

global header, 2-9
guest user, 2-2

H

header, global, 2-9
Home page, 2-5

L

language
 setting display language, 2-4
 setting report preference, 2-3
layout
 selecting a different layout when viewing a
 report, 3-4
locale, setting report preference, 2-4
location bar, 2-8

M

my folders, 3-1

O

options for report viewing, 3-2

P

parameters for report link, 3-2
passwords, changing, 2-4
preferences
 setting, 2-3
 setting display language, 2-4
 setting passwords, 2-4
 setting report locale, 2-3

R

report viewer options, 3-2
reports
 layout, 3-4
 locale, 2-4
 setting time zones, 2-4
 viewer options, 3-2
 viewing, 3-1

S

Safari browser, limitations when viewing XML, 3-6
searching the catalog, 2-9
shared folders, 3-1

T

Template Builder for Excel

 downloading, 2-6

Template Builder for Word, downloading, 2-6

time zones

 setting for reports, 2-4

U

user, guest, 2-2

V

viewer options, 3-2

X

XML viewing with Safari browser, 3-6

Z

zones, time, 2-4