Oracle® Analytics

Using Oracle Analytics Publisher in Oracle Analytics Server

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Preface

Learn to use Publisher to view, publish, and manage pixel-perfect reports.

Topics:

- Audience
- Documentation Accessibility
- Diversity and Inclusion
- Related Resources
- Conventions

Audience

This document is intended for report consumers who'll be viewing and scheduling reports in Oracle Analytics 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 customer access to and use of Oracle support services will be pursuant to the terms and conditions specified in their Oracle order for the applicable services.

Diversity and Inclusion

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

Related Resources

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

Conventions

The following text conventions are used in this document:

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

Videos and Images

Your company can use skins and styles to customize the look of the application, dashboards, reports, and other objects. It is possible that the videos and images included in the product documentation look different than the skins and styles your company uses.

Even if your skins and styles are different than those shown in the videos and images, the product behavior and techniques shown and demonstrated are the same.

1

Introduction to Pixel-Perfect Publishing

This topic introduces the features specific to viewing and scheduling pixel-perfect reports.

Topics:

- Overview of Pixel-Perfect Reporting
- Tasks for Report Consumers
- Set Your Account Preferences
- About the Catalog
- Download Desktop Tools

Overview of Pixel-Perfect Reporting

You can use Oracle Analytics Publisher, the pixel-perfect 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.

The tasks that are available to you depend on the permission that is assigned to you by your administrator. This guide describes how report consumers can view and schedule reports.

Role	Sample Tasks
Administrator	Configure security
	Configure system settings
	Set up data sources
	Configure connections to delivery servers
	Configure the scheduler
	Diagnose and monitor system processes
Application developer or integrator	Integrate Publisher into existing applications using the application programming interfaces
Data Model developer	Fetch and structure the data to use in reports
Report designer	Create report definitions and design layouts

Tasks for Report Consumers

Report consumers can run, view and schedule reports.

A report consumer performs the following tasks:

- Run and view reports in real-time from the catalog.
- Schedule reports to run at selected intervals and to various destinations such as printer, fax, or e-mail.
- View the history and the saved output of the report job.

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Set Your Account Preferences

Use the My Account dialog to set or view your account preferences and groups.

Your preferences may be inherited from another Oracle product. If this is true for your work environment, you can't update your preferences from within Publisher. If you aren't sure where to update your preferences, ask your administrator.

When Publisher is integrated with Oracle Analytics Server, the Report Locale, UI Language, and Time Zone user preferences are set in the Oracle Analytics Server application. When you update your Publisher preferences in Oracle Analytics Server, you must start a new Publisher HTTP session for these to take effect in the Publisher interface.

1. In the Publisher home page, click **My Profile *username*** and select **My Account**.

2. Set or view your account preferences in the **General** tab.

    *   **Accessibility Mode**

    *   **Email Addresses**

    *   **Default Printer**

3. View the groups assigned to you in the **My Groups** tab.

    Your user groups are the application roles to which you're assigned. You can't modify this list.

About the Catalog

The catalog stores the Publisher objects, such as reports, data models, and style templates.

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.

> **Note:**
>
> When you create folders in the catalog, don't use special characters (~, !, #, $, %, ^, &, *, +, `, |, :, ", \\, <, >, ?, ,, /) in the names of the folder.

You can use the Catalog page to perform more specialized tasks such as:

*   Setting object-level permissions

*   Downloading and uploading objects

*   Exporting and importing catalog translations

Browse the Catalog

You can browse the catalog and view the contents of a folder.

Use the Folders pane to display and navigate the content of personal, `My Folders`, and `Shared Folders`. All users can access the content in `Shared Folders`.

1. In the header, click **Catalog**.

2. Select a folder to view its contents in the display area.

Search the Catalog

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

When using Publisher as part of Oracle Analytics Server, ensure that your Administrator has configured Publisher to use the BI Search Fields; otherwise Publisher reports don't show up in the search results.

1. From the **Search** menu, select the object type and enter all or part of the object's name in the search field.

2. 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.

Download Desktop Tools

Download the Publisher desktop tools to use the Template Builder and the Template Viewer.

The Publisher desktop tools contain additional products that you can download and install. If you're designing Publisher RTF or Excel templates, select the Template Builder for Word, which downloads the Publisher Desktop installer.

Choose the latest version of the Oracle Analytics Publisher Desktop tool based on your version of Microsoft Office - 32-bit or 64-bit.

Download the Publisher Oracle Analytics Publisher Desktop tool directly from the Publisher Tools Downloads page or from:

* Oracle Analytics Server Home page

    Analytics Home page - From **Download Desktop Tools**, select **Template Builder for Word**, and then click **Downloads** in the Oracle Analytics Publisher page.

* Publisher **Home** page

    Navigate to Publisher help and select the option to download the Oracle Analytics Publisher Tools, and then click **Downloads** in the Oracle Analytics Publisher page.

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.

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 facilitates the design of Excel Templates.

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

2

View Pixel-Perfect Reports

This topic describes how to view pixel-perfect reports, interact with the report components, view the alternative layouts, and change the output options of the reports.

Topics:

- View a Report
- Configure Pixel-Perfect Reports Using Report Viewer

View a Report

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

The catalog displays two main reports folders:

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

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

For reports that aren't configured for online viewing, you can schedule a job to run the report.

1. Navigate to the report in the Catalog.

2. Click the report name or click the **Open** link for the report.

3. If the report requires parameter values, provide values for the parameters, and then click **Apply**.

Configure Pixel-Perfect Reports Using Report Viewer

Use the illustrated Report Viewer to configure pixel-perfect reports.

The following options are available in Report Viewer. Not all options are available for all reports.

- Specify parameters
- Select layout
- Select output type
- Perform actions

The image shows the Report Viewer options.
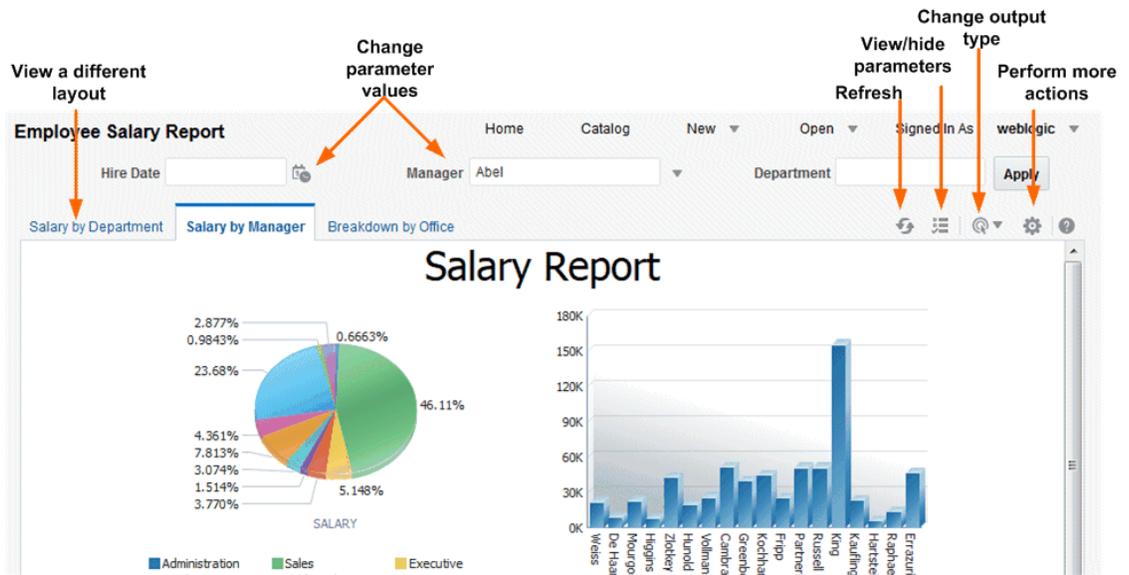
Specify Parameters

Reports that require 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. Use the report editor to configure the parameter settings specifically for each report.

1. Click **Parameters** in the upper right area of the report viewer to display or hide parameter prompts.

2. Input the parameter values.

   Depending on the report configuration, the following prompt types are available to you for providing the parameter values:

   • Calendar to select a date.

   • Text box to type a value. Separate multiple values with a comma.

   • Choice list to select a value. Some lists support multiple selections. Lists with many values support search. Click **Search** at the bottom of the scroll list to open the **Search** dialog.

   • Check box to make multiple selections.

   • Radio button to make a single selection.

3. Click **Apply** to re-display the report after selecting parameters. If there's 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.

Search for a Parameter Value

Use the parameter search option to search for a parameter value in a list.

1. Click **Search** at the bottom of the parameter scroll list to launch the Search dialog.

2. Enter a search string and then choose whether the value you're looking for starts with, ends with, or contains the entered string.

   You can use percent % and underscore _ as wild cards in your search string:

   • Percent % allows you to match any string of any length, including zero length.

   • Underscore _ allows you to match on a single character.

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

Select a Layout

When multiple layouts are available, they're displayed as separate tabs in the Report Viewer page. Different layouts can have different output types.

1. Open the report in the Report Viewer.

2. Select the report layout tab you want to view.

Select an Output Type

You can select an output option from the menu in the Report Viewer.

1. Open the report in the Report Viewer .

2. Select the output option for the report from the output type menu.

   The output automatically renders either in the browser or in a spawned application.

Output Types

The View Report list contains the output types that are available for a pixel-perfect report.

Output Types

Output Type	Description
Interactive	Enables pop-up chart value displays, navigable and filterable tables, and other interactive features for a report. This output is only available for layouts designed using the Layout Editor.
HTML	Generates the report as an HTML (Hypertext Markup Language) file for browser viewing.
PDF	Generates the report as a PDF (Portable Document Format) file and opens the report in Adobe Acrobat reader. This output type is optimized for printing.
RTF	Generates the report as a RTF (Rich Text Format) file . If you've a word processing application installed, such as Microsoft Word or OpenOffice.org, then you're prompted to open the application for viewing.
Word	Generates the report as a Microsoft Word document in the .docx format.
Excel (mhtml)	Generates an MHTML file that can be opened in Excel 2003 or later. Select this output type to view the report in Excel if you've Microsoft Excel 2003. This option supports embedded images, such as charts and logos.

Output Type	Description
Excel (html)	Generates an HTML file that can be opened in Excel. Select this output type only if you're running the earlier versions of Microsoft Excel 2000 or 2002. This option doesn't support embedded images.
Excel (*.xlsx)	Generates the report as an Excel.xlsx (Excel XML format) file. If you've Excel 2007 or later installed, this option provides the best preservation of layout and formatting.
	For output format Excel 2007, that uses the xlsx file extension, Publisher doesn't apply any formatting for number and date. Publisher saves the formatting mask and the actual value (date or number) into the XLSX output file. The formatting is handled by Microsoft Excel. For example:
	• 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 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 output file are formatted in fr-FR locale.
PowerPoint (mhtml)	Generates a PowerPoint file compatible with Microsoft PowerPoint 2003. Microsoft PowerPoint 2010 doesn't support this output type. Choose PowerPoint (*.pptx) instead.
PowerPoint (*.pptx)	Generates a PowerPoint file in Microsoft Office Open XML format. This output type supports Microsoft PowerPoint 2007 and later.
MHTML	Generates a MHTML (Mime HyperText Markup Language) file. This option 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.
PDF/A	Generates a PDF file, which has 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	Generates a PDF file, which supports pre-press graphics exchange. PDF/X is a specialized subset of the PDF standard that streamlines documents for high-quality print production output and restricts content that doesn't serve the print production, such as signatures, comments, and embedded multimedia.
Zipped PDFs	Generates a zip file containing the report PDF output and index files. This option is only available for reports that have been designed to enable zipped PDF output.
FO Formatted XML	Generates an XML file with the XSL-FO information.
Data (XML)	Generates the XML data. 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.

Output Type	Description
Data (CSV)	Generates the data in comma separated value format. The data must be in a simple `<rowset>/<row>` structure.

Perform Actions

The Actions menu provides more commands and operations that you can perform on a report.

1. Open the report in the Report Viewer.
2. Select the action from the **Actions** menu.

Actions

The options available to you in the Actions menu depend on your user privileges and properties set for the report.

Menu Option	Description
Add to My Favorite	Adds the 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.
Edit Layout	Enables you to update the layout you're viewing. When the layout was created using the Publisher **Layout Editor**, the Layout Editor launches in the browser. If the layout is based on another supported template type such as RTF, PDF, or Excel then you're 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 can't send a report in Interactive mode. You must 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.
Jobs	Enables you to view and manage currently scheduled jobs for this report.
Job History	Enables you to view completed and running report jobs.
Republish from History	Enables you to select a previously scheduled, completed job and specific output for viewing in the report viewer.

Menu Option	Description
Share Report Link	Enables you to generate a link that you can copy and reuse, based on the report that you're 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 Publisher logo, tabs, or navigation path.
	• **No Parameters** displays the current report without the header or any parameter selections. The **Actions**, **Export**, and **View Report** menus are still available.
	• **Document Only** displays the URL to the current report document only. Displays no other page information or options.

3

Create Pixel-Perfect Report Jobs

This topic describes how to create and monitor pixel-perfect report jobs. You can schedule report jobs to run at defined intervals and deliver reports to multiple destinations.

Topics:

Navigate to the Schedule Report Job Page

Navigate to the Schedule Report Job page to schedule a report job.

1. Navigate to the Report Job page from the Home page, the catalog, or the Report Viewer.

    - From the Home page, under **Create**, 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**.

2. Use the Schedule Report Job tabs to define the options for your report job.

Set General Options

Use the **General** tab to enter the general information in the table for a report job.

Before you a schedule a report job, make sure you have designed the data model and the layout for the report. If the you have defined parameters in the data model, specify the parameter values for the report job.

1. Select the **General** tab.

2. Enter the following information for the report job.

    - **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. For parameters that allow text entry, separate multiple values with a comma. For date parameters, you can use an expression to increment the date for each run.

Set Output Options

Each scheduled job can have multiple output files with distinct characteristics. Each output file can have multiple destinations.

The **Output** tab has two regions: **Output** and **Destination**.

1. Select the **Output** tab.

2. Select the output options required for the job.

   - Select **Use Bursting Definition to Determine Output and Delivery Destination** to use the report bursting definition for output and delivery. If you select this option, all other fields on this page are disabled for selection. This option is only available when bursting is enabled for the report.

   - Select **Use XML Data Chunking** to chunk XML data for processing large reports. If you select this option, the job can have only one output. This option is available only if you've enabled XML data chunking for the report.

   - Select **Enable XML Pruning** to prune large non-binary datasets. This setting isn't affected by the setting to prune XML data in the data model.
     XML data pruning isn't supported for:

     – XPT template

     – Bursting reports

     – Chunking XML data

   - Select **Make Output Public** 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.

   - Select **Save Data for Republishing** to save the XML data that is generated for this job. Access the saved data from the Report Job History page where you can republish it, selecting a new layout and output options.

   - Select **Compress output prior to delivery** to compress each report (all report formats except HTML) before delivery. The format for the file name of each compressed report is *Name_Output Format*.zip. For example, if the delivery destination is email for Order.pdf and Invoice.xlsx reports, the order_PDF.zip and Invoice_XLSX.zip reports are attached to the email.
     Supports email, HTTP, Content Server, and Documents Cloud Service (Oracle Content Management) delivery channels.

     In the Report Job History page, if you view the details of a job that was configured with the **Compress output prior to delivery** option, and then click **Send** in the Output & Delivery section, the delivered output isn't compressed.

Add Destination Types to Report Output

Enter delivery details in the report's Destination region to deliver a report to multiple destinations.

Administrator must set up the delivery servers in the Administration page.

1. From an existing report in the Report Viewer, select **Actions**, and then select **Schedule**.

2. In Schedule Report Job, click the **Output** tab.

3. In the **Output** tab, open Destinations, and from the **Destination Type** list, choose a destination type.

   Only those destination types set up by your administrator are displayed in the **Destination Type** list.

4. For each destination, from the **Output** list, select the documents to send to the destination.

5. Click **Add Destination** to deliver a report document to multiple destinations.

6. Select **Save Output** to view the output from the Report Job History page.

Report Output Destination Types

Select and define the destination types for your report's output in the Schedule Report Job page.

Only the destination types configured by the administrator are available for selection. You can add multiple destinations for the report's output.

Destination Type	Description
Email	Enter multiple email addresses separated by a comma.
	Enter any message text to include with the report. To format the message text, you can use HTML 4 elements such as fonts, lists, table cells, hyperlinks, and embedded GIF images.
	Use these options to configure a notification for email receipt and email read.
	• **Request Delivery Status Notification**
	Select this option to email a notification message to the sender when the email delivery is successful, delayed, or failed.
	• **Request Read Receipt**
	Select this option to email a notification message to the sender when the recipient opens the email message.
Printer	Select the printer group and the printer, enter the number of copies, and then 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.
Fax	Enter the fax number to which to send the report.
FTP	Skip the username and password fields to use the FTP delivery settings configured by the administrator. Only if you want to override the configuration of the FTP server and use password-based authentication, enter the valid username and password credentials for the FTP server.
	Specify the following properties:
	• **Remote Directory**
	(Required) Enter the delivery directory location, for example, `/pub/`.
	To deliver the document to the user's home directory, enter **.** (period).
	• **Remote File Name**
	(Required) Enter the file name for Publisher to assign to the delivery document on the remote server, for example, myreport.pdf.
	You must include the file extension in the name, for example, .pdf .
	You can assign a file name dynamically using a date expression.

Destination Type	Description
Content Server	Select the content server and the destination folder.
	To limit access to the report on the content server, assign a Security Group and Account to the report. Publisher retrieves the Security Group and Account values configured for the content server.
Content and Experience	Select the Oracle Content Management server and the destination folder.

Content Server Destination Type Properties

Content Server is one of the destination types to deliver your report document. Select the content server where you want the report delivered.

Use the information in this table to enter appropriate values for the Content Server properties.

Property Name	Description
Security Group	(Optional) Select the Content Server security group to assign to the report.
Account	(Optional) Select an account within the Security Group to assign to the report.
	You can enter values for the following required metadata fields. If you don't enter values for these fields, the values from the default report information apply.
Author	(Optional) Enter the name of the report's author. you leave this field blank, your user ID is used for the Author metadata field on the Content Server. If the administrator selected **Use Logged in user as Author** for the Content Server, Publisher sets the logged in user as the author in the Author metadata field on the Content Server.
Title	(Optional) Enter a title for the report. If you don't enter a title, the layout name is used for the title on the Content Server.
File Name	Enter the file name to assign to the delivered document on the remote server, for example, myreport.pdf. The file name is used as the Native File Name on the Content Server. If you don't supply a file name value, the Output name is used.
Comments	(Optional) Enter a description to include with the document on the Content Server.
Include Custom Metadata	The **Include Custom Metadata** option is only available if the data model for the report includes a Custom Metadata component. When you select the Include Custom Metadata option, the delivered document includes the custom metadata fields specified in the data model.

When you can configure an embedded parameterized report to display online, the parameters display the appropriate values from an analysis or a direct connection to a subject area. When you schedule a an embedded parameterized report, the parameters from the analysis aren't passed to the report. As a result, the report displays default values of the parameters used in the analysis. For a direct connection with a scheduled report, the parameters are passed and the values are displayed correctly in the report.

Add Outputs

You can create multiple report documents for one or more layouts using a combination of output format, locale, time zone, and calendar.

1. From an existing report in the Report Viewer, select **Actions**, and then select **Schedule**.

2. In Schedule Report Job page, click the **Output** tab.

3. In the **Output** tab, click **+** to add an output.

4. In **Name**, type a name for the output.

   The length of the report job output file name must be less than 100 characters.

5. Select the options to use from the **Layout**, **Format**, **Locale**, **Timezone**, and **Calendar** lists.

   • For Output Format, specify the type of document generated such as PDF, HTML, or XLS. The available outputs are specified in the report definition.

   • For Locale, the locale defaults to the `Report Locale` defined in the user **Preferences**. If the layout doesn't have an available translation for the selected locale, Publisher applies a locale fallback logic to select the layout. The appropriate number and date formatting are applied independently of the template translation.

   • For Time Zone, the time zone defaults to the time zone defined in the user **Preferences**.

6. Click **Save Output**.

Define the Schedule for a Job

You can define a schedule for executing a report job.

1. From the Publisher Home page, under Create, select **Report Job**.

2. In Schedule Report Job, on the General tab, click search next to the **Report** field.

3. In Open, navigate to and select the report, and then click **Open**.

4. In Schedule Report Job, click the **Schedule** tab.

5. In the **Frequency** list, select the option to use for this report.

6. Complete the options for the specified frequency.

7. Click **Submit**.

8. Optional: In Submit, in the **Report Job Name** field, type a name, and click **OK**.

Define a Recurrence Pattern

In the Schedule Report Job page's Schedule tab, define the when the report is run from these recurrence pattern options.

Option	Description	Values
Frequency	Defines when to run the report job using the scheduler from the **Frequency** list.	NA
Frequency	**Once**	Use the **Run Now** option or use the date selector to enter the specific **Start** date and time

Option	Description	Values
Frequency	**Hourly/Minute**	Use the following values: • **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.
Frequency	**Daily**	Use the following values: • **Every** - Enter the increment in days, for example, to run the report every day enter 1, or 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 when (hour of the day) the job is run. • **End** - (Optional) Use the date selector to enter an end date and time for this job.
Frequency	**Weekly**	Use the following values: • **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, in the **Schedule** tab, select **Frequency** = Daily, **Every** =14, **Start** = first Wednesday when you want to run the report, and **End** = future end date. • **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 processed for each run. • **End** - (optional) Use the date selector to enter an end date for this job.
Frequency	**Monthly**	Use the following values: • **Every** - Select each month that the job runs. • **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 processed for each run. • **End** - (Optional) Use the date selector to enter an end date for this job.

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Option	Description	Values
Frequency	**Annually**	Use the following values: • **Every** - Enter the increment in years that the job runs. • **On** - Select either a day in a month, for example, Day 1 of January, or select a day of the week for 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 processed for each run. • **End** - (Optional) Use the date selector to enter an end date for this job.
Frequency	**Specific Dates**	Use the **Add Date** option to specify the date and time to run the job. Add multiple specific dates as needed.
Run Now	This option depends on the selection made from the **Frequency** options.	NA
Start	This option depends on the selection made from the **Frequency** options. Specifies the date and time to start the report job.	NA

Use Schedule Triggers

You can associate a job with a schedule trigger that is defined in any data model.

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

About Schedule Triggers

A schedule trigger tests for a condition which if met, runs a job.

If the trigger condition returns a result, the specified job runs. If the trigger condition isn't met, the job instance is skipped. You can also set up a repeat schedule for the trigger to keep checking for the condition. If the condition isn't met, you can set the time interval, in minutes, to wait before the trigger is processed again.

You could use a schedule trigger when:

- 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.

Set the triggers in the data model and then they're available for selection from the **Schedules** tab.

Enable a Schedule Trigger

You can enable a trigger defined in the data model.

1. Select **Use Trigger**.

2. Optional: Set the **Retry Limit** value to specify the maximum number of times to process the schedule trigger to check for the condition. The default value is 1 and only positive integer values are allowed in this field.

3. Optional: Set the **Pause Time** value to specify the number of minutes to wait before re-processing the schedule trigger. If the **Retry Limit** value is set to a value greater than 1, this field is enabled. Only positive integer values are allowed in this field.

   The retry limit and pause time should not exceed the recurrence schedule time interval. If the condition returns false when the maximum number of attempts is reached, then the job status is displayed as Skipped.

4. Select the **Data Model** that defines the schedule trigger.

5. Select an option from the **Trigger** list.

6. If the schedule trigger includes parameters, select values to use.

Configure Notifications

You can configure email and HTTP notifications.

Make sure the administrator configures the delivery email servers or HTTP servers to send the notifications.

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

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

- Select the **Notification** tab.
  - To enable email notification, perform these steps:
    1. For **Notify By**, select **Email**.
    2. Select the report completion statuses for which to send the notification.
    3. Enter a comma-separated list of addresses.
  - To enable HTTP notification, perform these steps:
    1. For **Notify By**, select **HTTP**.
    2. Specify the HTTP server to which to send the notification.
    3. Specify the user name and password for the HTTP server, if required.
    4. Select the report completion statuses for which to send the notification.

Submit and Monitor a Job

Use the Submit Job dialog to review the confirmation details of the job.

1. Select **Submit** to invoke the Submit Job dialog with confirmation details for you to review.

2. Enter a name for this job and click **Submit**.

3. Optional: On the global header, click **Open** and then click **Report Jobs** to suspend, edit, or delete a job.

4. Optional: On the global header, click **Open** and then click **Report Job History** to monitor a running job or to see the results.

Create a Job from an Existing Job

You can create a job from an existing job in the Manage Report Jobs page.

1. From the Publisher Home page, under **Browse/Manage**, click **Report Jobs**.

2. In Manage Report Jobs select filter criteria to find the existing job.

3. In the results table, click **Edit** to open the job for editing.

4. Enter the details for the new job definition. When finished, click **Submit as new**.

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

Create a Bursting Job

You can create a bursting job if the report is configured for bursting.

Bursting is 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 email address.

You must configure the bursting definition for a report in the report's data model.

1. Make sure the report is enabled for bursting.

2. From the Publisher Home page, under Create, select **Report Job**.

3. Select the **Use Bursting Definition to Determine Output & Delivery Destination** box on the **Output** tab.

Advanced Topics

You can increment date parameters and dynamically define a destination file name.

Topics:

• Increment Date Parameters
• Define a Destination File Name Dynamically with a Date Expression

Increment Date Parameters

You can provide expressions in the report's date parameter fields.

If the scheduled report includes date parameters, when you enter values for the schedule dates, you can't change the date values. Every time a scheduled instance of the report is run, the same date parameters are used. If changing the date parameters is required for each run, you can enter an expression in the date parameter field of the scheduler to calculate the date each time the report job runs.

For example, if you create a schedule for a report that runs every Monday to capture data from the previous week, you need to update 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 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 aren't evaluated until the report job is processed 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: {$SYSDATE()-1$}

You can set up the date functions 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.

Define a Destination File Name Dynamically with a Date Expression

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

The date expressions are described in the following table.

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

Expression	Description
%S	Displays the number of seconds in two digits: 00 - 59
%I	Displays milliseconds in three digits: 000 - 999

Examples

Use these examples to create a file name that appends a date and a file name that prefixes a date and appends a time.

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`

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`

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*.

4

View and Manage Pixel-Perfect Report Jobs

This topic describes how to view and manage pixel-perfect report jobs submitted to Publisher.

Topics:

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.

Use the Manage Report Jobs page to:

- View the future scheduled and recurring jobs for your private, shared, and public reports.
- Select the time zone in which you want to view the job start and end time.
- Refresh the display page to display the recently submitted jobs.
- Link to the 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.

Access the Manage Report Jobs Page

You can access the Manage Report Jobs page and then search for the report jobs to manage; or, you can access this page from the context of a specific report.

1. To search for jobs to manage, navigate to the Manage Report Jobs page in one of the following ways:
   - On the Home page, select **Browse/Manage**, then **Report Jobs**.
   - On the global header, click **Open**, and then click **Report Jobs**.

2. To access the Manage Report Jobs page from the context of a specific report perform one of the following:

- From the catalog, navigate to the report in the catalog and click **Jobs**.

- From the **Report Viewer** page, click **Actions**, and then click **Jobs**.

View Jobs for a Specific Report

In the Manage Report Jobs page, you can specify the search criteria and view jobs of a specific report.

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

Following are the default filters applied:

- **Report Name** - The name of the report from which you launched the Manage Report Jobs page

- **Owner** - Your user ID

- **Scope** - All (public and private jobs)

- **Status** - All (active and suspended jobs)

1. With a report open, from the Catalog or Report Viewer, go to Manage Report Jobs.

2. Specify the search criteria to further filter the results.

3. View the reports listed under **Report Jobs**.

Search for Report Jobs

You can specify a search criteria and search for report jobs.

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

1. On the header, click **Open**, and then click **Report Jobs**.

2. In the Filters section, enter values for the **Filter** criteria to search for a specific job or group of jobs.

3. Click **Search**. The jobs that meet the filter criteria are displayed in the **Report Jobs** table.

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

    Possible status values are:

    - **Active** - The job runs when the schedule event occurs.

    - **Paused** - The job is suspended. The report job doesn't run again until it's been resumed. Paused jobs are displayed when searching for **Suspended** jobs using the filter criteria.

Set the Time Zone for Viewing Jobs

You can select the time zone for viewing the job start and end times on the Manage Report Jobs page.

1. Navigate to the Manage Report Jobs page in one of the following ways:

- On the Home page, select **Browse/Manage**, then **Report Jobs**.

- On the global header, click **Open**, and then click **Report Jobs**.

2. Select the time zone from the **Select time zone to view jobs** list.

3. Click **Refresh**.

   The **Report Jobs** table refreshes and displays job start and end times in the selected time zone.

View Job Details

You can view the details of a job listed in the Manage Report Jobs page.

1. On the header, click **Open**, and then click **Report Jobs**.

2. Click the **Report Job Name** to view the details of the job.

3. To view the delivery information for each output, click the expand icon next to the output name.

4. Click **Return** to return to the Manage Report Jobs page.

Pause Jobs

You can search for report jobs in the Manage Report Jobs page and pause jobs.

1. On the header, click **Open**, and then click **Report Jobs**.

2. In the Manage Report Jobs page, select the job by clicking anywhere except the job name link in the table row that lists the job information.

   You can select multiple jobs by pressing **Ctrl** or **Shift** and then selecting the additional rows. Deselect a row by clicking it again.

3. Click **Pause**.

Resume Jobs

You can search for report jobs and change the status of a paused job to active.

You can select multiple jobs by pressing `Ctrl+Shift` and then clicking the additional rows. Deselect a row by clicking it again.

1. On the header, click **Open**, and then click **Report Jobs**.

2. In the Filters section, specify the criteria to search for a specific job or group of jobs, and then click **Search**.

3. In the Report Jobs table, select the job by clicking anywhere except the job name link in the table row of the paused job.

4. Click **Resume**.

   The status of the job changes to *Active*.

Delete Jobs

You can search for report jobs in the Manage Report Jobs page and delete a job.

1. On the header, click **Open**, and then click **Report Jobs**.

2. In the table row that lists the job information, select the job by clicking anywhere except the job name link.

   You can select multiple jobs by clicking additional rows.

3. Click **Delete**.

Edit Jobs

You can search for report jobs in the Manage Report Jobs page and edit a job.

1. On the header, click **Open**, and then click **Report Jobs**.

2. In the Manage Report Jobs page, do one of the following:

   • Click the **Edit** icon for the job in the results table.

   • Click the **Report Job Name** to view the detail page for the report job, and then click the **Edit** icon next to the report job name.

3. Edit the job details using the **General**, **Output**, **Schedule**, and **Notification** tabs.

4. Click **Submit 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 report job.

5

View and Manage Pixel-Perfect Report History

This topic describes the job history features including republishing data from history, sending the job output to new destinations, and getting error information on report jobs that didn't complete successfully.

Topics:

- View Report Job History and Saved Output
- View Job History for a Specific Report
- Search for Report Job History
- View Details of a Job History
- Download Data from a Report Job
- Republish a Report from History
- Send an Output to a New Destination
- Monitor Running Jobs
- Cancel a Running Job
- Get Error and Warning Information for Reports
- Delete a Job History

View Report Job History and Saved Output

The Report Job History page displays information about running and completed report jobs.

You can access the Report Job History page and then search for the report job history. You can also access this page from the context of a specific report. Use one of the following to select **Report Job History**.

- **Browse/Manage** in the Home page.
- **Open** on the global header.

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

- View the status and details of running and completed report jobs.
- Identify the critical 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 Republishing** for the report.

- Delete report jobs from history.

View Job History for a Specific Report

If you navigate to the Report Job History page from the context of a specific report, then the jobs for that report are automatically displayed with the default filters applied.

1. Perform one of the following:

   - From the **Catalog**, navigate to the report, and click **Job History**.
   - From the **Report Viewer**, navigate to the report, and click **Job History**.

2. In the Report Job History page, specify the filters if required and click **Search**.

   Following are the default filters:

   - *Report Path* - 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* - User ID.
   - *Scope* - All Histories including Private Job Histories and Public Job Histories.
   - *Status* - The possible values for status:

     – Success - The job completed without error.

     – Failed - The job failed to complete.

     – Running - The job is currently running.

     – Output has error - The job completed with errors.

     – Canceled - The job was cancelled

     – Cancelling - The job is in the process of being cancelled.

     – Delivery has error - The job couldn't deliver the report to the specified destination.

     – Update status has error - The instance Job ID is null or empty because of an issue and the scheduler can't set the job status.

     – Deleted - The job is deleted.

     – Scheduled - The job is scheduled.

     – Skipped - The job was skipped. When there's an event trigger associated with the data model used in the report and if that trigger execution either returns False or throws an exception, the scheduler skips that job and sets the status to Skipped and halts processing.

     – Suspended - The job execution is suspended for some reason.

     – Unknown - The job is in an undefined state that's not matching the other statuses.

     – Waiting - The job is in queue for reasons such as the threads aren't available for JMS Processor. In this case, the scheduler doesn't start processing the job.

Search for Report Job History

Specify the filter criteria for searching a report job history.

1. Enter values for the **Filter** criteria to search for a specific job history or group of completed report jobs.

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

   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.

View Details of a Job History

Use the Report Job History page to view the details of a job history.

1. In the Report Job History page, 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 Report Job History page.

Download Data from a Report Job

You can view the details of a report job, download the XML data, and save the file to your preferred location.

You must enable the **Save Data for Republishing** option when you create the job to make the data available for republishing.

While the output download or XML data download from a report job is in progress, you can download the output or XML data from another report job. You can't download the output or XML data from the same report job for which the download is in progress except in these cases:

- If the subsequent request to download the output or XML data from the same job is handled by a different node in the cluster.
- If the report job has multiple outputs, you can download the output in different formats in parallel in different browser tabs or sessions.

1. In the Report Job History page, click the report job name in the Report Job Histories table to view the job detail page.
2. In the **Output & Delivery** section, click the **XML Data** download button.
3. When prompted, select the location to save the file.

Republish from History in Report Viewer

In Report Viewer, you can use your job history to republish data.

On successful completion of the jobs that save data for republishing, you can republish data using any of the supported output formats for the layout templates included in the report. You can apply a new layout, choose a different output format, or export the report. Because you're using the data retrieved from a previous report run, you can't update the parameters.

1. Select the report in the BI catalog.
2. Click **Open** to run the report in Report Viewer.
3. On the **Actions** menu, click **Republish from History**.
4. In the Open dialog, select the job name and specify the output format.

In the **Job Name** drop-down list, you can view only ten jobs. To view all the jobs submitted by you in the Report Job History page, click **View full history for this report**.

5. Click **Okay**.

Republish a Report from History

You can republish a report from history.

You must enable the **Save Data for Republishing** option when you create the job to make the data available for republishing.

1. In the Report Job History page, click the **Report Job Name** to view the job detail page.

2. From the **Output & Delivery** section, 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're using data the retrieved from the previous report run, you can't update the parameters.

4. To return to the Report Job History page, click the **Actions** menu and select **Return**.

Send an Output to a New Destination

You can send the output of a report to a new or the same destination.

You must enable the **Save Output** option when you create the job to make the output available in the history table. It simply sends the output to the destination selected.

1. In the Report Job History page, click the **Report Job Name** to view the job detail page.

2. In the **Output & Delivery** section, locate the output that you want to send to a new destination or to the same destination, and click **Send**.

3. In the Send dialog, do the following:

   a. Select the delivery type.

   b. Click **Add Destination**.

   c. Enter the appropriate fields for your delivery type.

4. After you finish adding the destinations, click **OK**.

After you close the delivery submission notification, you can select a destination type and click **Add Destination** to get the **OK** button to submit another report delivery. In the Job History Details page, you can view the delivery status of report deliveries.

Monitor Running Jobs

You can monitor the stages of the report processing when a job is in running status.

1. In the Report Job History page, hover over the **Running** status indicator in the Report Job Histories table.

   The status displays with the instance ID of the cluster instance handling the processing.

2. To check the latest status, refresh the page. The status doesn't automatically update while you're viewing the page.

Process Stages of Jobs

This topic lists the processing stages of a job.

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	In report processor
	Rendering report document
	Report document rendering completed
	Report processor completed
	Error rendering report document
Delivery Processor The valid values for `<delivery>` are email, fax, FTP, Print, WebDAV, or Document Cloud Services, depending on the destinations selected for the report.	In `<delivery>` processor
	Delivering to `<delivery>` processor
	Document delivered to `<delivery>` server
	`<Delivery>` processor completed

Cancel a Running Job

You can cancel a running job.

1. In the Report Job History page, 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** or **Shift** and then clicking the additional rows. Deselect a row by clicking it again. You can only cancel a job that has the status, *Running*.

2. Click the **Cancel Running Jobs** icon at the top of the table.

3. Click **OK** in the confirmation message.

Get Error and Warning Information for Reports

If a report job fails or completes with warnings, you can view the error and warning information.

- In the Report Job History page, hover over the error or warning status indicator in the results table

  The job details page also displays error and warning.

  For more complete diagnostic information on errors or warnings, you can view the diagnostic log files for the job.

Delete a Job History

You can delete a job history.

1. In the Report Job History page, click anywhere within the table row for the report job to select it (except the job name link).

   You can select multiple rows.

2. Click the **Delete** icon at the top of the table.

3. Click **OK** on the Confirmation dialog.

6
Manage Pixel-Perfect Reports

This topic describes how to manage the pixel-perfect report components in the folders. It includes setting permissions, downloading and uploading reports and folders, and moving report components in the catalog.

Topics:

- Overview of Folders
- Reporting Components Stored in the Catalog
- Create a Folder or Subfolder
- Perform Tasks on Catalog Objects
- Download and Upload Catalog Objects
- Understand the Impact of Taking Actions on Objects Referenced by Reports
- Export and Import Catalog Translation Files

Overview of Folders

The catalog folders store the reports, data models, style templates, and sub templates, that you create.

You and every other user have their own personal folders, **My Folders**. Reports in personal folders can only be accessed by the user who created and saved the content into the folder. You can add subfolders to **My Folders** to organize the content in the way that's most logical to you.

> ✏️ **Note:**
>
> The information in this chapter applies to installations of Publisher that aren't integrated with the Oracle Analytics Server.

You can also save reports in shared folders where other users or groups can access them. 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 reports within that folder. Your administrator creates and maintains the shared folder structure.

Reporting Components Stored in the Catalog

Each reporting component has an identifying icon and lists the creation and modification information. Next to each item is a list of actions you can take.

The following reporting components are shown in the catalog:

- Folders

- Reports
- Data Models
- Style Templates
- Sub Templates

Create a Folder or Subfolder

You can create a subfolder within your `My Folders` or, if you've the required permissions, you can create a shared system folder.

1. Navigate to the desired location in the Folders pane in Catalog.
2. On the **Catalog** toolbar, click **New** and select **Folder**.
3. Optional: In New Folder, enter the folder name and enter a description.
4. Click **Create**.

Perform Tasks on Catalog Objects

You can perform tasks on catalog objects such as edit, copy, paste, rename, download, and set permissions.

You can perform tasks on objects in a number of ways such as:

- By using the links next to the object.
- By using the catalog toolbar.
- By selecting the object and choosing the task from the Tasks region.

The image shows the Catalog page.

The toolbar, Tasks pane and More menu all provide access to the actions you can take on the items in the catalog.
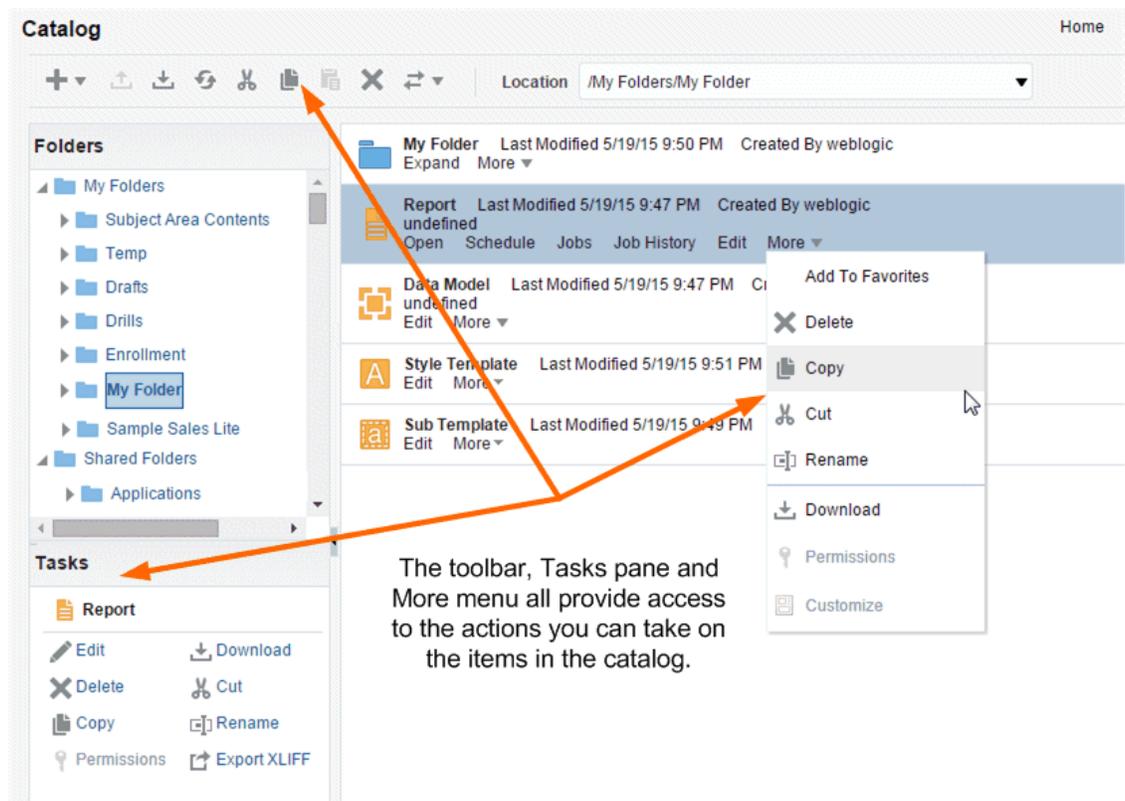
Your access to these actions depends on the permissions granted to you by your administrator.

Download and Upload Catalog Objects

The download feature of the Publisher catalog enables you to bundle and download multi-component 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.

The ability to download and upload catalog objects enables you to transfer objects across environments. For example, you can use this feature to transfer Publisher objects from a development environment to a production environment.

Extensions for Archived Objects table lists the file extensions that Publisher assigns to each type of archived object when downloaded.

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

If Publisher is integrated with the Oracle Analytics Server, then use the archive and unarchive features of the Oracle BI Presentation Catalog to perform this function.

Understand 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's used as a resource for a report, the references to the resource are broken and the report can't run as expected.

For example, if you've a report that was created with a data model that resides in a folder called **My Data Models**, and you move the data model to another folder, the report can't run because the report definition is expecting to find the data model in the **My Data Models** folder.

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.

Export and Import Catalog Translation Files

Export and import catalog translation files function enables administrators to export an XLIFF file that contains the translation strings.

For users with administrator privileges, the catalog toolbar includes the Export XLIFF and Import XLIFF function. See Translate Catalog Objects, Data Models, and Templates.

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.

1. Select the files in the Catalog.
2. Use the Export XLIFF and Import XLIFF function.

7
Accessibility Features

This appendix provides information about how to use Oracle Analytics Publisher accessibility features for report consumers.

Topics:

What Are Accessibility Features?

The accessibility features in Publisher aim to make the aspects of navigating and using the product easier for persons with disabilities and for the aging population.

The accessibility features support the use of standards-based assistive-technology hardware and software such as Freedom Scientific JAWS or Microsoft Narrator.

The accessibility features are grouped into these general categories:

- Features used by third-party assistive-technology products. These features center on providing a user interface that consists of standard HTML elements that can be easily interpreted by third-party assistive technology products.

- Accessibility mode, as described in Change to Accessibility Mode.

- Keyboard shortcuts that make it easier to navigate content for users with limited or no ability to use a mouse.

  See Keyboard Shortcuts.

- Content design capabilities that make it possible for content creators to create content that supports users with accessibility needs.

Change to Accessibility Mode

Accessibility mode in Publisher makes the rendering of the user interface more compatible with screen readers while allowing only that functionality that's supported for users with disabilities to be visible.

1. On the Publisher Home page, press **Tab** multiple times to navigate through the global header until the focus is on your user name in the **Signed In As** area.

2. Press **Enter**, then **Tab** to highlight the **My Account** link.

3. Press **Enter** to display the My Account dialog.

4. Press **Tab** to navigate through the fields on the **General** tab until you reach the **Accessibility Mode** options.

5. Use the arrow keys to select the **On** option.

6. Press **Enter** to save your changes and close the dialog.

7. Refresh the page to see it displayed in accessibility mode.

Accessibility Support in the Publisher User Interface

Alternative navigation tools, such as keystrokes, enable users to navigate Publisher and work with reports in accessibility mode.

The following list provides information on accessibility mode:

- The Home page doesn't contain links for accessing the Administration page or for performing most editing functions.

- Graphs and map views aren't displayed but are instead converted to one or more annotated tables.

- Tables and pivot tables are rendered with appropriate internal annotations to enable screen readers to describe the contents of cells.

> ✎ **Note:**
>
> Refer to your assistive-technology documentation for all applicable table navigation shortcuts.

- You can't use the mouse to modify the layout of a table or pivot table.

By default, Publisher doesn't use accessibility mode. Each user can decide whether to enable accessibility mode during sign in as described in Signing In Using Keystrokes or after sign in by using the following procedure.

Sign In Using Keystrokes

You can sign in to Publisher using keystrokes rather than the mouse.

1. Open the Publisher sign-in page.

2. To change the language for the sign-in page, press `Tab` to place the insertion point in the **Language** field, and use the arrow keys to select the desired language.

3. In the **User ID** field, enter the user ID and press `Tab`.

4. In the **Password** field, enter the password.

5. To render Publisher content in a browser in a way that facilitates the use of a screen reader, press the spacebar to select the **Accessibility Mode** box.

6. Press `Shift+Tab` twice to place the insertion point on the **Sign In** button, then press `Enter` to activate the **Sign In** button.

Navigate to the Home Page

If the Home page displays after signing in or by navigating from another location in Publisher, you must press CTRL+ALT+G to place the focus on the Skip to Content link in the upper-left corner of the Home page.

1. Sign in to Publisher, as described in Sign In Using Keystrokes.

2. Press `CTRL+ALT+G` to display the **Skip to Content** link in the upper-left corner of the Home page.

3. Press one of the following keys:

   • `ENTER` on this link to navigate to the default starting location on the Home page that's the first link in the upper-left corner under the global header.

   • `TAB` to navigate to the first element in focus on the global header.

4. Continue to press `TAB` to navigate through the elements on the Home page.

Navigate Multiple Rows in Tables

When accessibility mode is turned on, each table row contains a **Select** option to assist you in working with multiple rows in a table.

For example, you can use the **Select** options on the Report Job Histories page to select multiple report jobs for deletion.

If you position the cursor in the **Select** option in a row, you can also use the Up/Down keys to navigate between table rows.
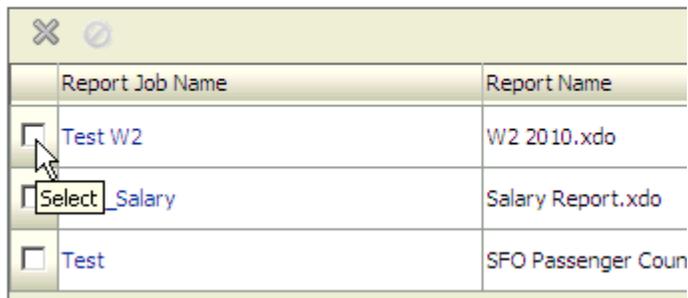
Accessibility Support in Publisher Report Output

Publisher report output renders accessibility support to HTML generated from RTF or layout editor-based reports.

Reports with accessibility design features include the following HTML report properties:

• Document title.

• Alternative text property to describe images such as charts.

• Table summary property to summarize table content.

• Header level property to specify the order in which the table header rows are read in accessibility mode.

Keyboard Shortcuts

Publisher supports standard keyboard shortcuts. The table lists the shortcuts and the actions.

Publisher supports standard keyboard shortcuts that are used in many software applications. In addition, both components offer shortcuts to perform tasks that are specific to those

components. The general keystrokes table describes general keyboard shortcuts for use with Publisher.

Keyboard Shortcut	Result
CTRL+ALT+G	Navigates to the first focusable element in the global header, which is the **Skip to Content** link. This link enables you to bypass the options available in the global header and move to the features available in the main part of the Home page.
TAB	Navigates to the next focusable element.
SHIFT + TAB	Navigates to the previous focusable element.
Down Arrow	Navigates to the next menu option.
Up Arrow	Navigates to the previous menu option.
ENTER	Triggers the activity, when the focus is on a link, an image, or a button with an associated URL or activity.
Esc	Closes the menu that has the focus.

The following table describes keyboard shortcuts for navigating reports in Publisher.

Keyboard Shortcut	Result
ALT + Up or Down Arrow	Opens drop-down and combo boxes.
CTRL + Up or Down Arrow	Shows the next or previous item in a combo box.

> **Note:**
>
> If you use Freedom Scientific JAWS or other screen reader programs, then you must first disable the virtual PC cursor before using the keystroke combinations to navigate the report. You must enable the virtual PC cursor at other times, including during navigation within table objects on a report.

A
Frequently Asked Questions for Publisher Reports

This section provides answers to frequently asked questions for using Publisher Reports.

Topics:

- Where do I save my reports, data models, templates so that only I can access them?
- How do I configure a default printer?
- How do I schedule a job to burst reports to multiple destinations?
- How do I apply the changes I made to my preferences?
- How do I download Publisher Reports as PDF?

FAQs to Publish Data

This topic provides answers to frequently asked questions about publishing data.

Where do I save my reports, data models, templates so that only I can access them?

Use My Folders as your personal storage. Only you can access the objects you stored in My Folders.

How do I configure a default printer?

Set your preferences for your account in the My Account dialog.

How do I cancel the jobs scheduled in Publisher?

Navigate to the Jobs History page, locate the job you want to cancel, and then click **Cancel**.

How do I schedule a job to burst reports to multiple destinations?

1. Make sure the administrator has configured the connections to data source connections and delivery channels.
2. Create a data model for the report.
3. Define bursting in the data model.
4. Use an appropriate report template and design the report layout.
5. View the report in Report Viewer.
6. When you schedule the bursting job, specify the output formats, bursting query, and the delivery destinations.

How do I apply the changes I made to my preferences?

In Publisher, if you changed your preferences such as time zone and locale, you can immediately apply the changes in your Publisher session.

1. Append the `&relogon=1` parameter to the end of the page URL and re-load the page.

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2. Log out of Publisher and log in again.

How do I download Publisher Reports as PDF?

You might be unable to download Publisher reports as PDF in Chrome browsers due to the way that the PDF plug-in handles embedded content in iframes.

You have the following options to download reports as PDF:

- Click **Print** to download a report as PDF.

- Display the report in another browser such as Firefox and download it from there.

- Click **Export** or click **Share Report Link** (use `_xpt=1` parameter) to download the report directly.