Oracle® Fusion Middleware

User's Guide for Oracle Business Intelligence Publisher

12c (12.2.1)

E57394-01

October 2015

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

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Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher, 12c (12.2.1)

E57394-01

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Preface

Welcome to Release 12c (12.2.1) 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 that have purchased support 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.
- Go to the Product Information Center Support note (Article ID 1338762.1) on My Oracle Support at `https://support.oracle.com`.

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/technetwork/middleware/ias/downloads/fusion-requirements-100147.html`

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

`http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.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.
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.

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 12c (12.2.1). The following information describes the differences in features, tools, and procedures between releases.

New Features and Changes for Release 12*c* (12.2.1)

In Release 12c (12.2.1) the look and feel of the user interface is refreshed. You will notice new icons and some changes to the presentation of features on the Home page.

1

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	*Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*
Application developer or integrator	Integrating BI Publisher into existing applications using the application programming interfaces	*Oracle Fusion Middleware Developer's Guide for Oracle Business Intelligence Publisher*
Data Model developer	Fetching and structuring the data to use in reports	*Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher*
Report designer	Creating report definitions Designing layouts	*Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*

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

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 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"

2

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. For information on the BI Publisher features in the Oracle BI EE interface, see "Introducing Oracle Business Intelligence Enterprise Edition" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

2.1 Accessing Oracle Business Intelligence Publisher

You can access BI Publisher in the following ways:

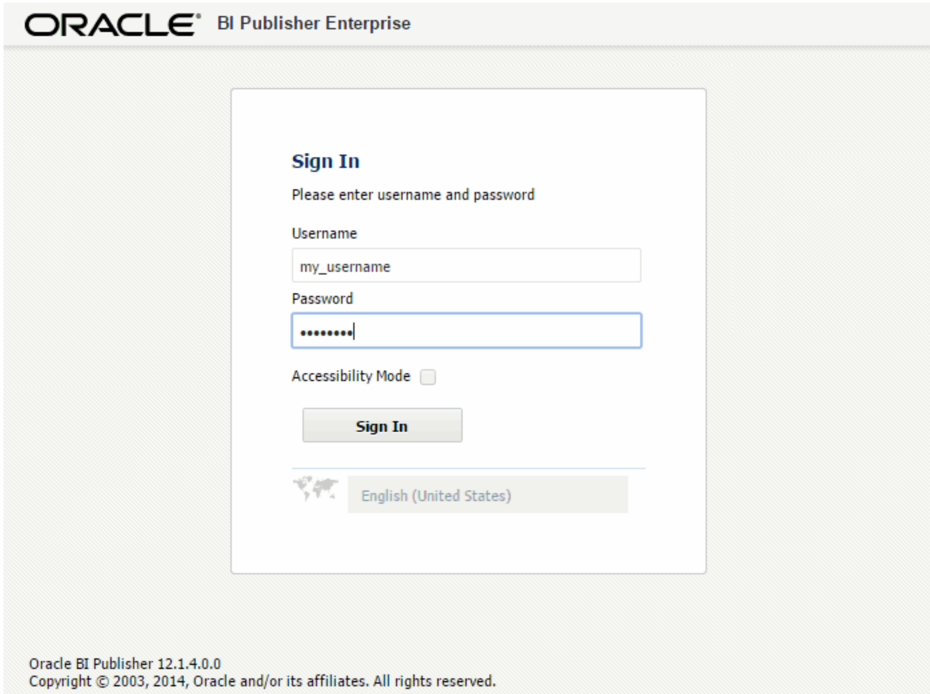
- Section 2.1.1, "Logging in with Credentials"
- Section 2.1.2, "Logging in as Guest"

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



2. Select the language that you prefer for log in page. Your language selection only remains in effect for the current session of BI Publisher. The next time you log into BI Publisher, the original default language is displayed.

   The log in page language selection does not take effect on any other pages in BI Publisher. For more information on setting the overall BI Publisher UI Language, see Section 2.2.2, "Setting General Preferences."

   If your implementation of BI Publisher is integrated with Oracle Business Intelligence Enterprise Edition (BI EE), you cannot modify the language selection on the log in page.

3. Enter your credentials to sign in to BI Publisher.

4. Click **Sign In**.

Note: For information about **Accessibility Mode** see Section 2.2.2.4, "Accessibility Mode.".

Get Started:

- 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

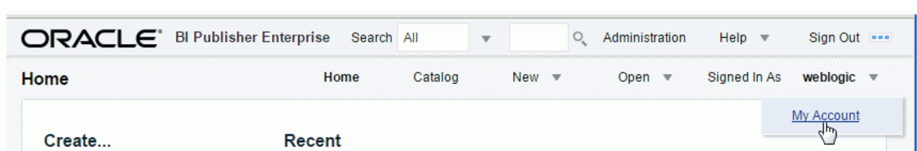
Note: Your preferences may be inherited from another Oracle product. If this is true for your work environment, you cannot update your preferences from within BI Publisher. If you are not sure where to update your preferences, ask your administrator.

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 more 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 edit Account preferences:

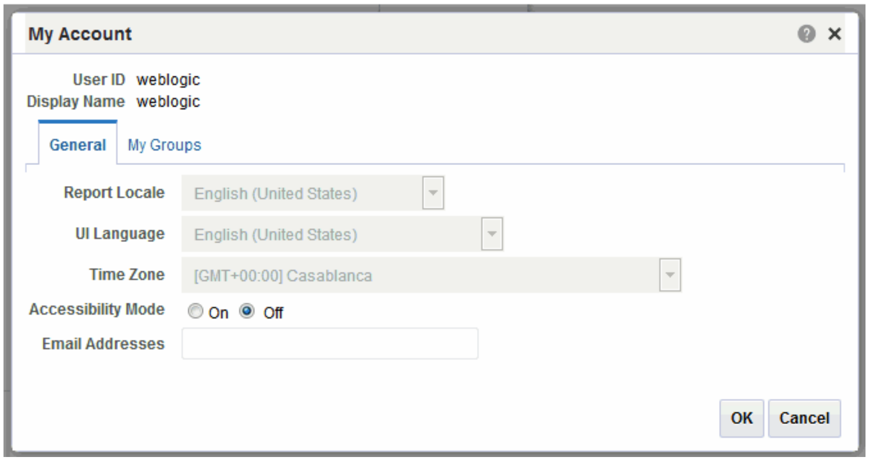
1. In the global header, click your user name displayed after **Signed In As** and then select **My Account** as shown in Figure 2–2.

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

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 "Locale Selection Logic" 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, and you select languages that are available for your installation.

If your implementation of BI Publisher is integrated with Oracle Business Intelligence Enterprise Edition (BI EE), you cannot change the UI language here. For more information, see "Setting Preferences" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

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.

The Administrator can override your individual time zone setting so that all reports or some reports use the same system time zone setting instead.

2.2.2.4 Accessibility Mode

Setting this to "On" enables features of the BI Publisher user interface to enhance accessibility for users who interact with BI Publisher using the keyboard only.

With Accessibility Mode on, the following features are enabled:

- Tables on user interface pages display checkboxes to enable multi-row selection and subsequent action.
- Menus can be accessed with assistive technology.
- "Skip to content" is enabled. When tabbing into the main page of the application, the first item you tab to is a special field that states "Skip to content." When you press the Enter key with focus on this item, the focus skips over the header links to the main body of the page. For example, if you are on the Home Page and you tab to "Skip to content" and press Enter, you are advanced to the Create region with focus on Report. The focus skips over Search, Help, Sign Out, and other links in the global header.
- The create report process flow limits the options presented to require the selection of a data model as the first step in the process.
- The Administration link is not displayed.

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.

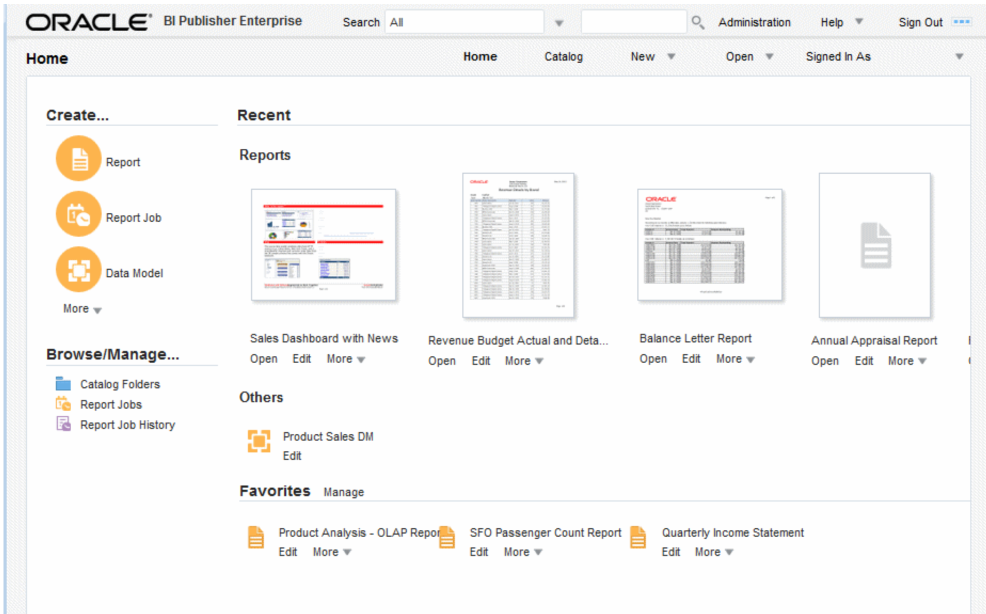
2.2.4 Viewing Your User Groups

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, "Jobs or Browse/Manage"
- Section 2.3.3, "Download BI Publisher Desktop Tools"
- 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 and Editing Reports" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*
Create Report Job	Chapter 4, "Creating Report Jobs"
Create Data Model	"Using the Data Model Editor" in *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher*
Create Style Template	"Creating and Implementing Style Templates" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*
Create Subtemplate	"Understanding Subtemplates" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*

2.3.2 Jobs or Browse/Manage

The Jobs section of the Oracle BI Enterprise Edition Home page provides access 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 Download BI Publisher Desktop Tools

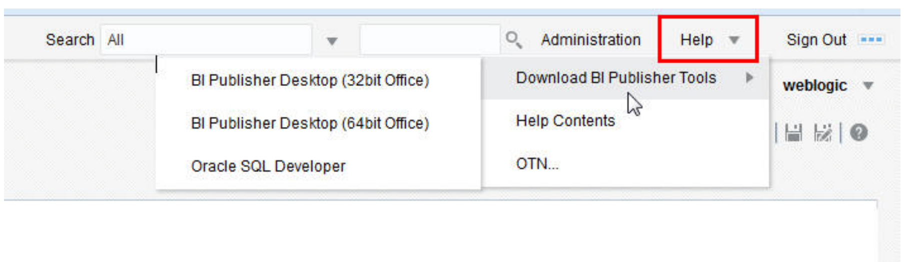
You can download the BI Publisher desktop tools from the Oracle BI Enterprise Edition Home page, or from the BI Publisher Home page:

- From the Oracle BI Enterprise Edition Home page:

  The **Download BI Desktop Tools** list displays from the Oracle BI Enterprise Edition Home Page and contains additional products that you can download and install. If you are designing BI Publisher RTF or Excel templates, select the Template Builder for Word, which downloads the BI Publisher Desktop installer.

- From the BI Publisher Home page:

  Click **Help** and then select **Download BI Publisher Tools.**



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 facilitates the design of 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.

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.

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. Select the report in the catalog pane.
2. Drag the report to the Favorites region.

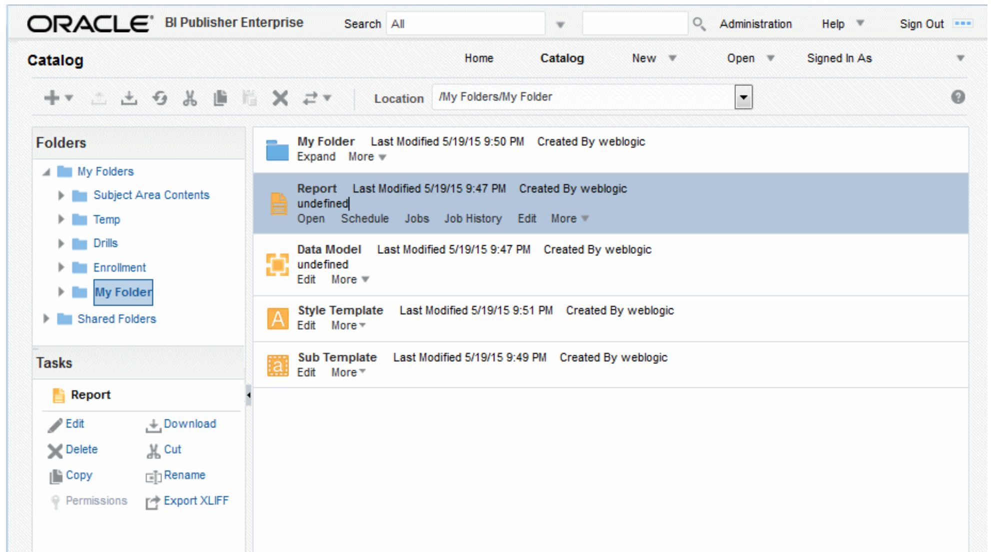
To delete an object from Favorites:

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 BI Publisher Folders."

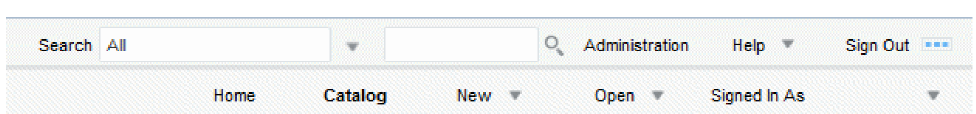
2.4.1 Browsing the Catalog

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.

2.5 About the Global Header

The global header, shown in Figure 2–6, 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 2–6 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.

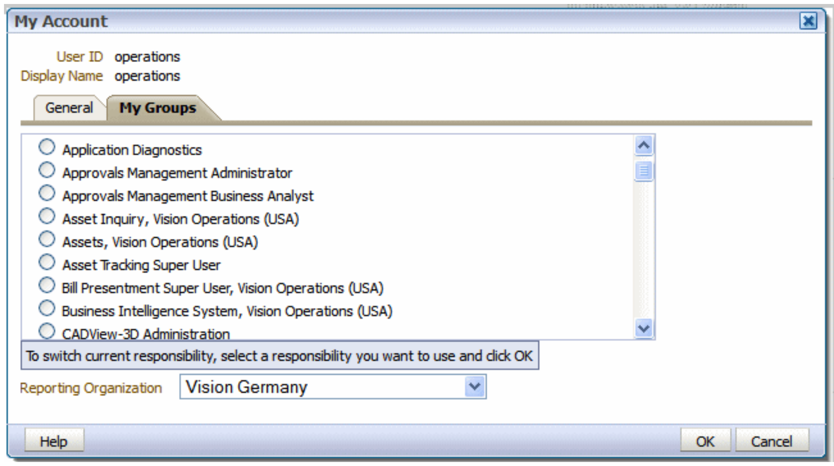
Note: When using BI Publisher as part of Oracle BI Enterprise Edition, ensure that your Administrator has configured BI Publisher to use the BI Search Fields; otherwise BI Publisher reports do not show up in the search results. See "Configuring BI Publisher to use the Oracle BI EE Catalog" in *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

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 2–7.

Figure 2–7 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**.

3 Viewing a Report

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

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"

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.

2. 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.

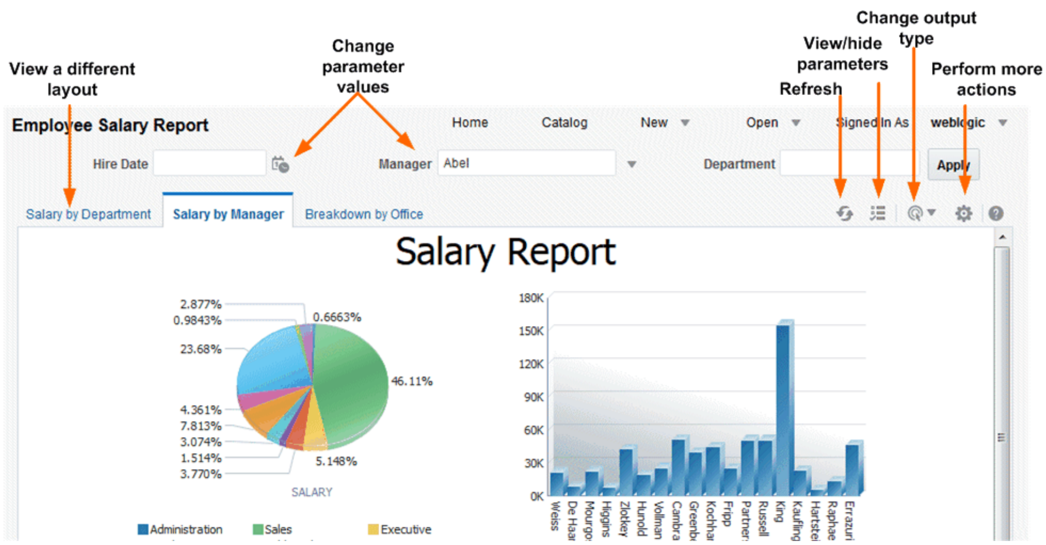
   Note: Some reports are not configured for online viewing. For these reports, the **Open** link does not display. Select **Schedule** to schedule a report job. For more information, see Section 4.1, "Navigating to the Schedule Report Job Page."

   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.

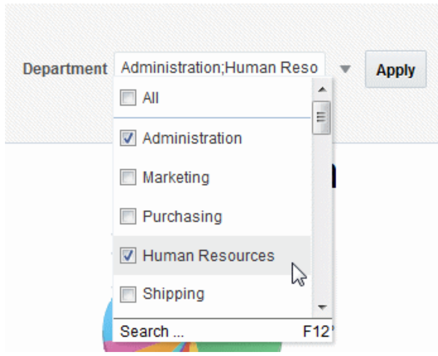
Some reports include an **Apply** button that you must click to redisplay the report after making parameter selections. If there is no **Apply** button, the report is regenerated automatically after you make a new value selection. The display of the **Apply** button is a parameter property setting. For 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.

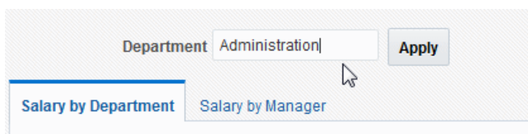
Figure 3–2 Multi-Select List Displayed as a Menu



Lists with many values support search. Click **Search** at the bottom of the scroll list to open the **Search** dialog. For more information, see Section 3.3.1.1, "The Parameter Search Dialog."

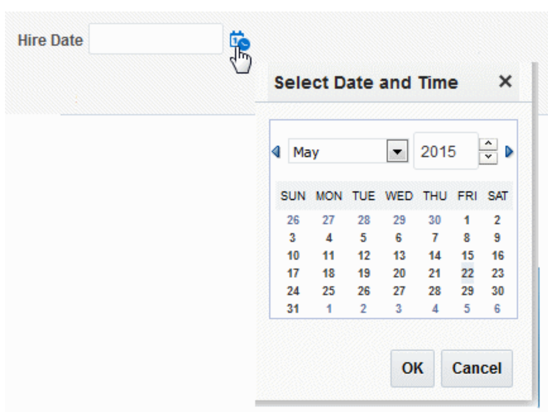
- A text box into which you can type a value, as shown in Figure 3–3. Separate multiple values with a comma.

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

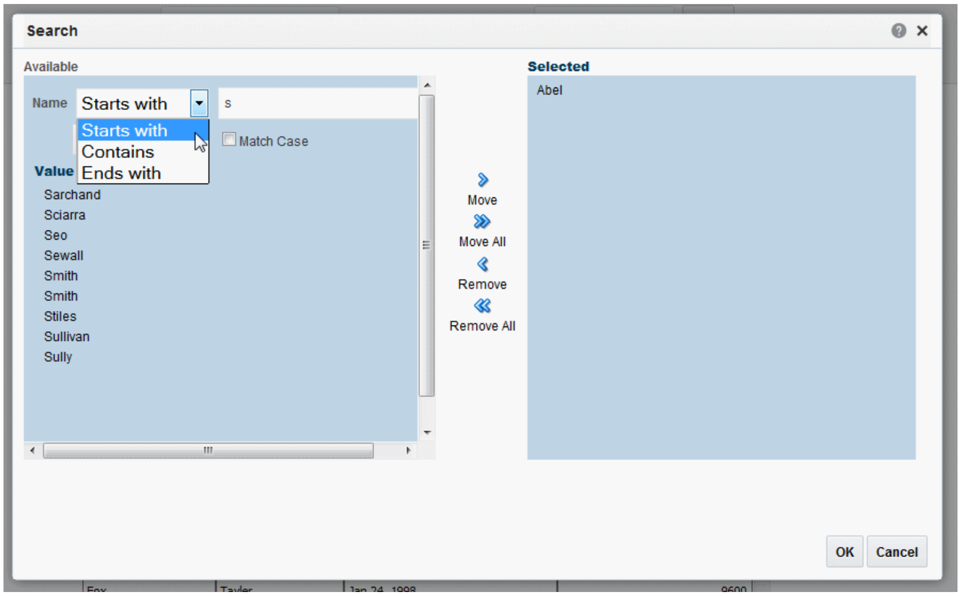
To search for a parameter value in a list, click **Search** at the bottom of the parameter scroll list to launch the **Search** dialog. Enter a search string and then choose whether the value you are looking for starts with, ends with, or contains the entered string.

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

% Allows you to match any string of any length (including zero length)

_ Allows you to match on a single character

Figure 3–5 Parameter Search Dialog

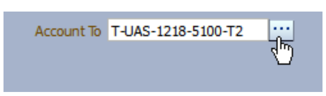


For parameters that support multiple value selections, the search dialog includes a shuttle interface to select multiple returned values.

3.3.1.2 Flexfield Parameter Dialog

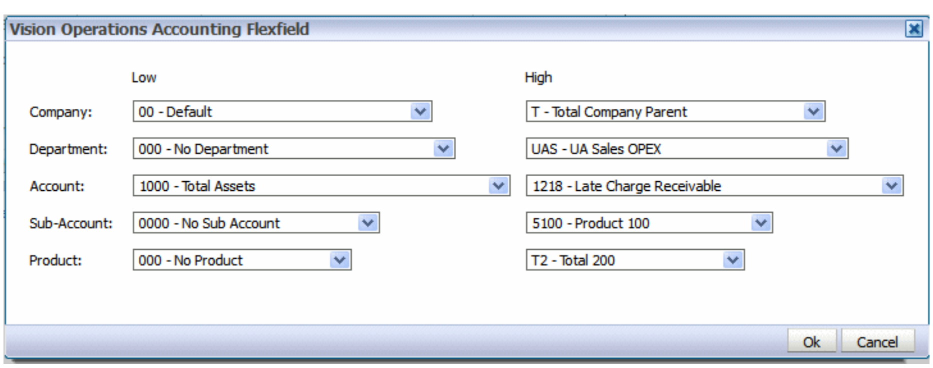
This type of parameter applies to Oracle E-Business Suite only. Flexfield parameters display the identifier shown in Figure 3–6.

Figure 3–6 Flexfield Parameter Identifier



Click the flexfield parameter identifier to open the parameter entry dialog. Enter values for the flexfield segments in the dialog, as shown in Figure 3–7.

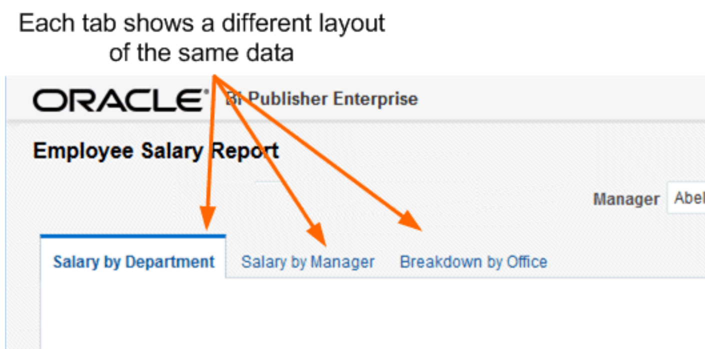
Figure 3–7 Flexfield Parameter Dialog



3.3.2 Layouts

When multiple layouts are available, they are displayed as separate tabs in the report viewer page, as shown in Figure 3–8. To view the report displayed in a different layout, click its tab. Note that different layouts may have different output types enabled.

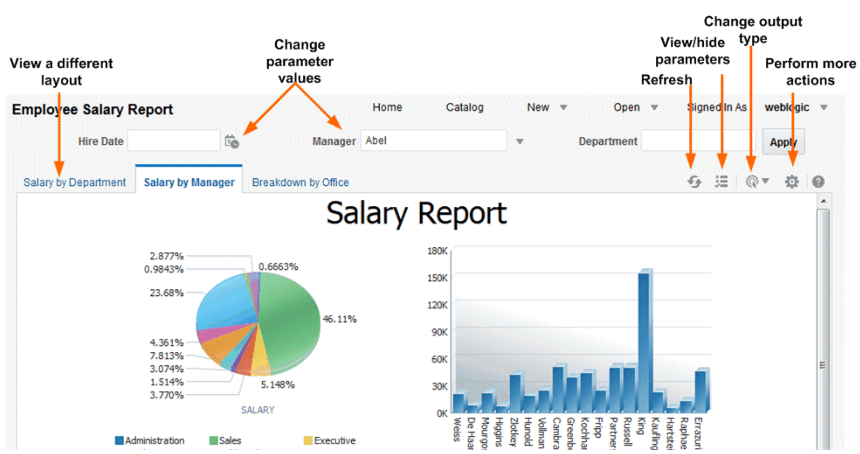
Figure 3–8 Multiple Layout Tabs



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 3–9 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.

- **Word** - (.docx) generates a Microsoft Word document in the .docx format.
- **Excel (mhtml)** - 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 (html)** - 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 (*.xlsx)** - 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 (mhtml)** - select this output type to generate a PowerPoint file compatible with Microsoft PowerPoint 2003. Note that Microsoft PowerPoint 2010 does not support this output type. Choose PowerPoint (*.pptx) instead.
- **PowerPoint (*.pptx**) - select this output type to generate a PowerPoint file in Microsoft Office Open XML format. This output type is supported for versions of Microsoft PowerPoint 2007 and later.
- **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.
- **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.
- **Zipped PDFs** - 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 more 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 Formatted XML** - generates an XML file with the XSL-FO information.

- **Data (XML)** - displays the report XML data.

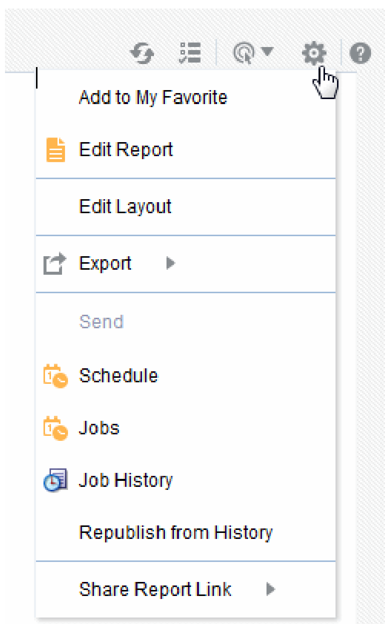
Important: For Safari browser users: The Safari browser renders XML as text. To view the XML generated by the data engine as XML, right-click inside the frame displaying the data and then click **View Frame Source**. This is a display issue only. The data is saved properly if you choose to export the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

- **Data (CSV)** - displays the data in comma separated value format. The data must be in a simple <rowset>/<row> structure.
- **Flash** - displays output for templates designed using Adobe Flash. You must have the Adobe Flash Player Plug-in installed for your Web browser.

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 3–10.

Figure 3–10 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. For more information on using the report editor, see "Editing Reports" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.
- **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. For more information, see "Creating BI Publisher Layout Templates" 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.

  Note that 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. For more information, see Section 4.1, "Navigating to the Schedule Report Job Page."
- **Jobs** enables you to view and manage currently scheduled jobs for this report. For more information, see Section 5.1, "About the Manage Report Jobs Page."
- **Job History** enables you to view completed and running report jobs. For more information, 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.
- **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. For more information on setting this and other report properties, see "Configuring Report Properties" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

4

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:

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

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:

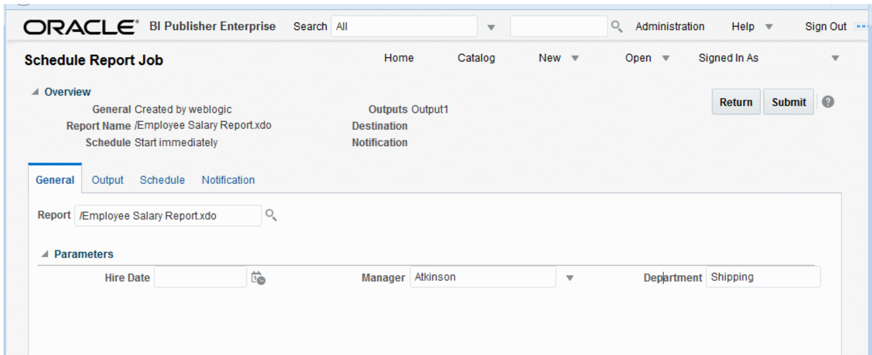
- From the Home page: From the **Create** region, select **Report Job**.
- From the catalog: Navigate to the report you want to schedule, then select the **Schedule** link.
- From the Report Viewer: Click **Actions** and then click **Schedule**.
- From the global header: Click **New** and then click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

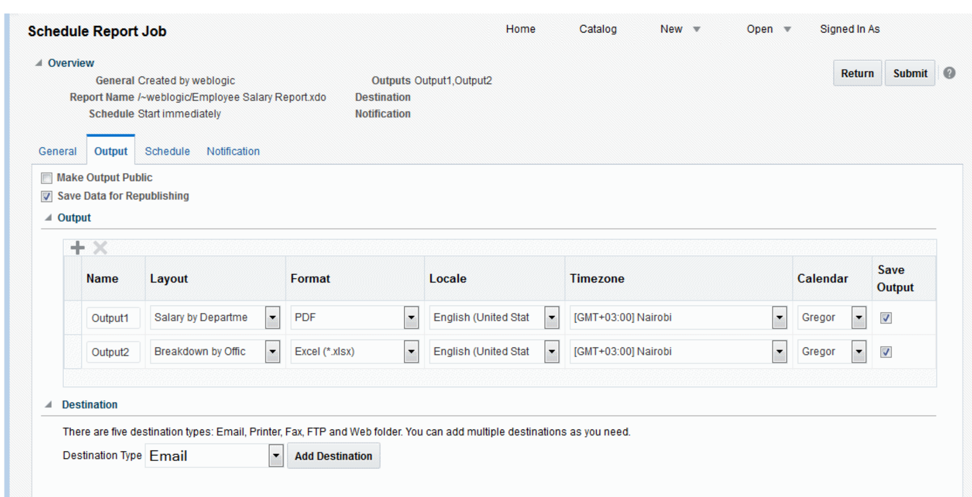
Table 4–1 General Information for the Report Job

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. For parameters that allow text entry, separate multiple values with a comma. **Note:** For date parameters, you can use an expression to increment the date for each run. For more information, 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. This option is only available when bursting is enabled for the report. 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.
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 *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*. 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

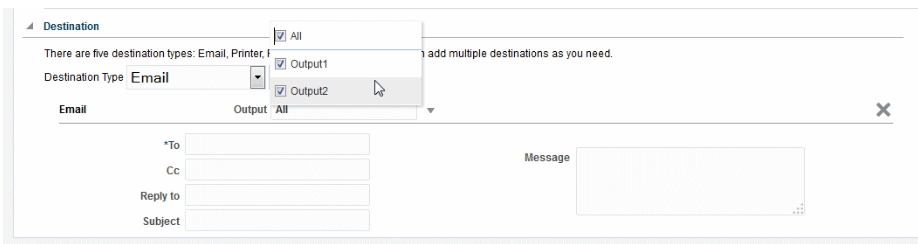
Enter the delivery details in the Destination region. To deliver a report document to multiple destinations, select the **Add Destination** button and continue adding destinations as needed.

Note: Delivery servers are set up in the Administration page. 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. For more information, 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



Enter the appropriate fields for each destination type. Only those destinations set up by your administrator show in the Destination Type list:

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 - (Required) enter the directory to which to deliver the document (example: /pub/). To deliver the document to the user's home directory, enter '.'

Remote File Name - (Required) enter the file name for BI Publisher to assign to the delivery document on the remote server (example: myreport.pdf). Ensure that you include the file extension in the name (for example, .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."

4.3.2.6 Content Server

Select the content **Server** where you want the report delivered.

To limit access to the report on the content server, assign a Security Group and Account to the report. BI Publisher retrieves the Security Group and Account values from the content server for you to choose from.

Security Group - optionally select the WebContent Server security group to assign to the report.

Account- optionally select an Account within the Security Group to assign to the report.

You can enter values for the following required metadata fields. If you do not enter values for these fields, BI Publisher assigns the values from the default report information.

Author - optionally enter a value for author. If you do not enter an Author, your username is used for the Author metadata field on the WebContent Server.

Title - optionally enter a title for the report. If you do not enter a Title, the Layout name is used for the Title on the WebContent Server.

File Name - enter the file name to assign to the delivered document on the remote server (example: myreport.pdf). This field is used for the Native File Name on the WebContent Server. If you do not enter a value here, the Output name is used.

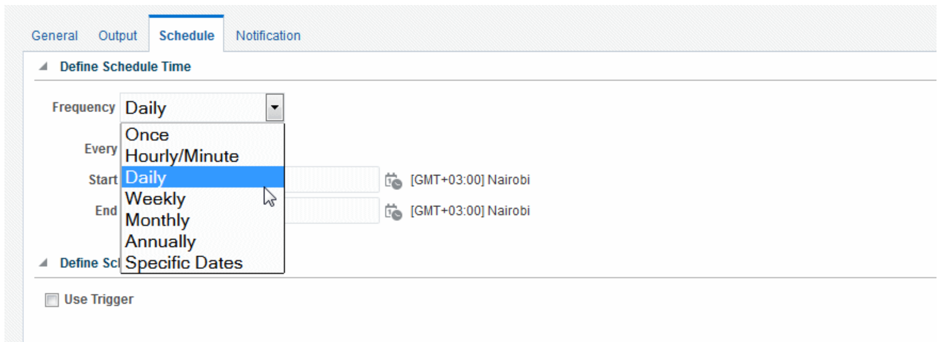
Comments - optionally enter comments to include with the document on the WebContent Server.

Include Custom Metadata - This option is only available if the data model for the report includes a Custom Metadata component. When you select this option the delivered document will include the custom metadata fields specified in the data model.

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. You can also set up a repeat schedule for the trigger to keep checking for the condition. If the condition is not met, you can set the time interval (in minutes) to wait before the trigger is executed again.

Some examples of when you would 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 *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher*.

To enable a schedule trigger:

1. Select **Use Trigger**.
2. (Optional) Set the **Retry Limit** value to specify the maximum number of times to execute 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-executing 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.

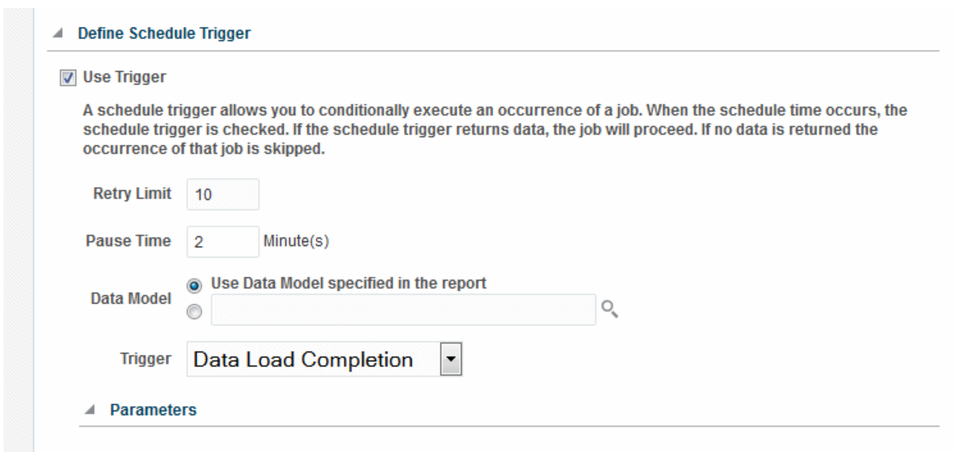
Note: The retry limit and pause time should not exceed the recurrence schedule time interval.

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. When the data model is selected, the Trigger list displays the schedule triggers defined in the data model.
5. Select the trigger from the list.
6. If the schedule trigger includes parameters, select 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



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

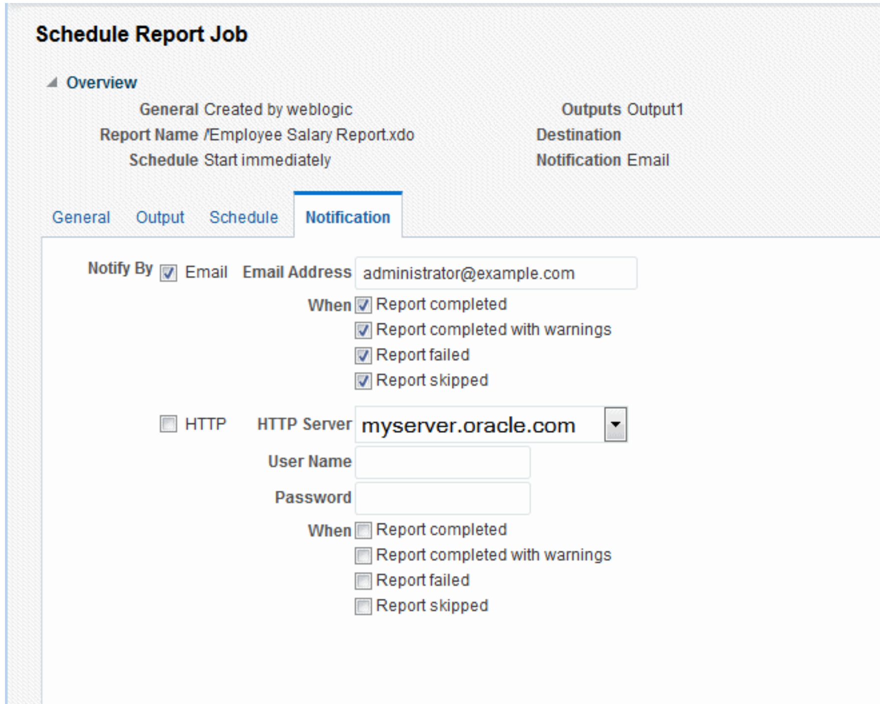
BI Publisher supports two methods of notification: e-mail and HTTP.

Note: Configure the delivery e-mail servers and HTTP servers in the Administration Delivery Configuration page, see "Setting Up Delivery Destinations" 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



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.

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**.

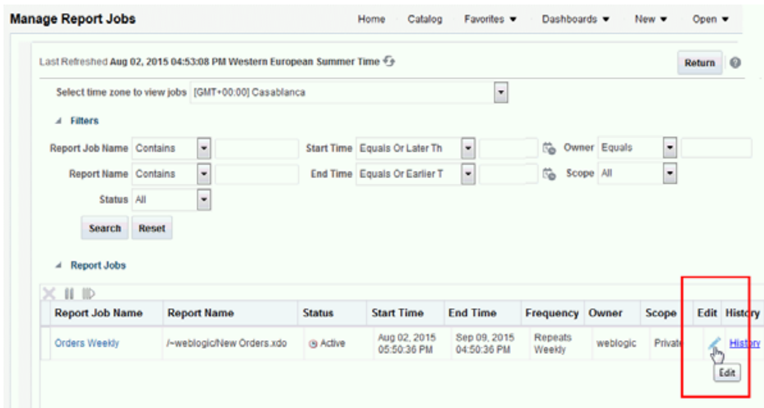
To suspend, edit, or delete a job, navigate to the **Manage Report Jobs** page as follows: On the global header, click **Open** and then click **Report Jobs**. For more information, see Section 5.1, "About the Manage Report Jobs Page."

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**. For more information, see Section 6.1, "Viewing Report Job History and Saved Output."

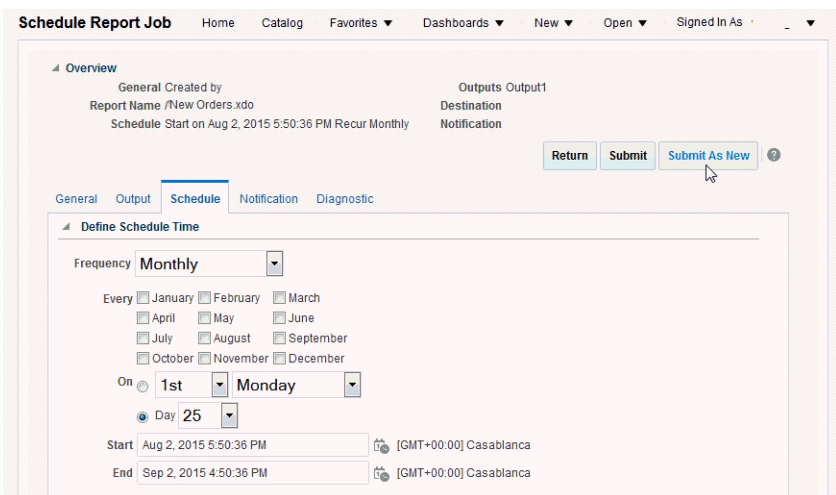
4.7 Creating a Job from an Existing Job

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

1. Navigate to the **Manage Report Jobs** page: On the Home page, under **Browse/Manage** 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 "Adding a Bursting Definition to Your Data Model" 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. For more information, 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
%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".

4.10 Running Diagnostics for a Report

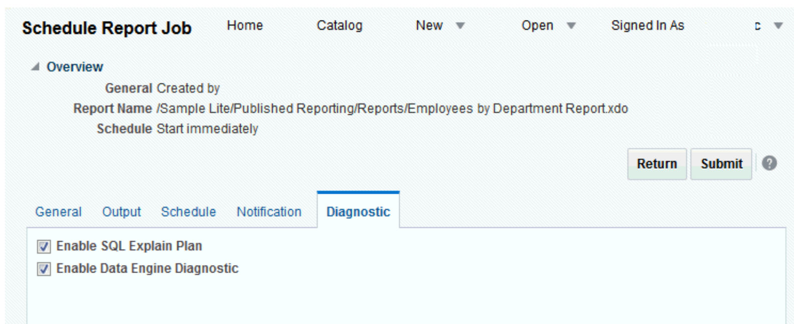
If you have the Administrator or Develop Data Model role, you also have access to the **Diagnostics** tab on the Scheduler.

Use the options on the Diagnostics tab to get performance and memory usage information about the report. Oracle recommends that you use these options to tune your queries before moving them into a production environment. For more information, see "SQL Query Tuning" in *Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher*.

To generate an explain for a report, run the report through the Scheduler:

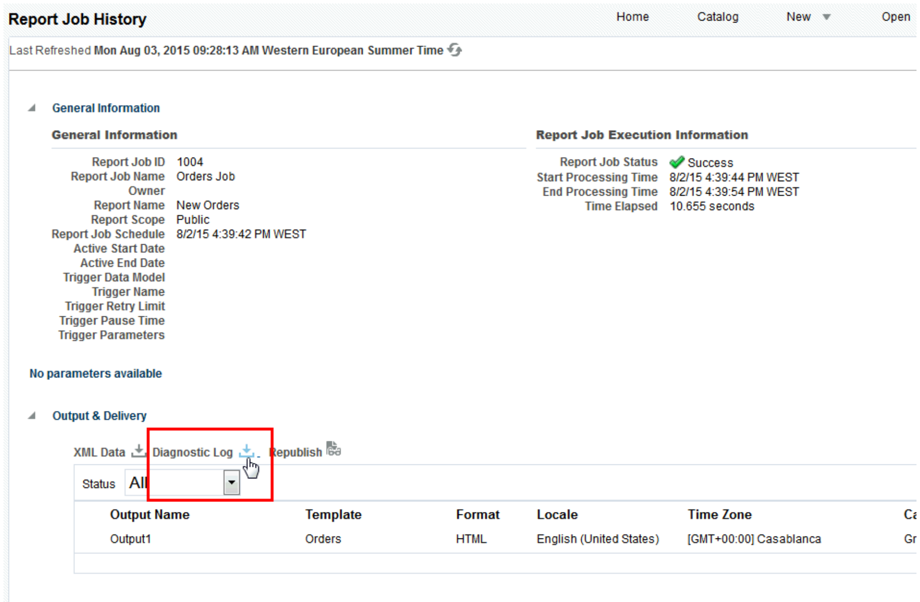
1. On the **New** menu, select **Report Job**.
2. Select the report to schedule then click the **Diagnostics** tab.

   Note: You must have BI Administrator or BI Data Model Developer privileges to access the **Diagnostics** tab.
3. Select **Enable SQL Explain Plan** and **Enable Data Engine Diagnostic**.



4. Submit the report.
5. When the report finishes, go to the **Report History** page.

   (From the **Home** page, under **Browse/Manage**, select **Report Job History**.)
6. Select your report to view the details. Under **Output & Delivery** click **Diagnostic Log** to download the explain plan output.


Report Job History
Home
Catalog
New
Open
Last Refreshed Mon Aug 03, 2015 09:28:13 AM Western European Summer Time
General Information
General Information
Report Job ID 1004
Report Job Name Orders Job
Owner
Report Name New Orders
Report Scope Public
Report Job Schedule 8/2/15 4:39:42 PM WEST
Active Start Date
Active End Date
Trigger Data Model
Trigger Name
Trigger Retry Limit
Trigger Pause Time
Trigger Parameters
Report Job Execution Information
Report Job Status Success
Start Processing Time 8/2/15 4:39:44 PM WEST
End Processing Time 8/2/15 4:39:54 PM WEST
Time Elapsed 10.655 seconds
No parameters available
Output & Delivery
XML Data
Diagnostic Log
Republish
Status All
Output Name
Template
Format
Locale
Time Zone
Output1
Orders
HTML
English (United States)
[GMT+00:00] Casablanca

5 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:

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:

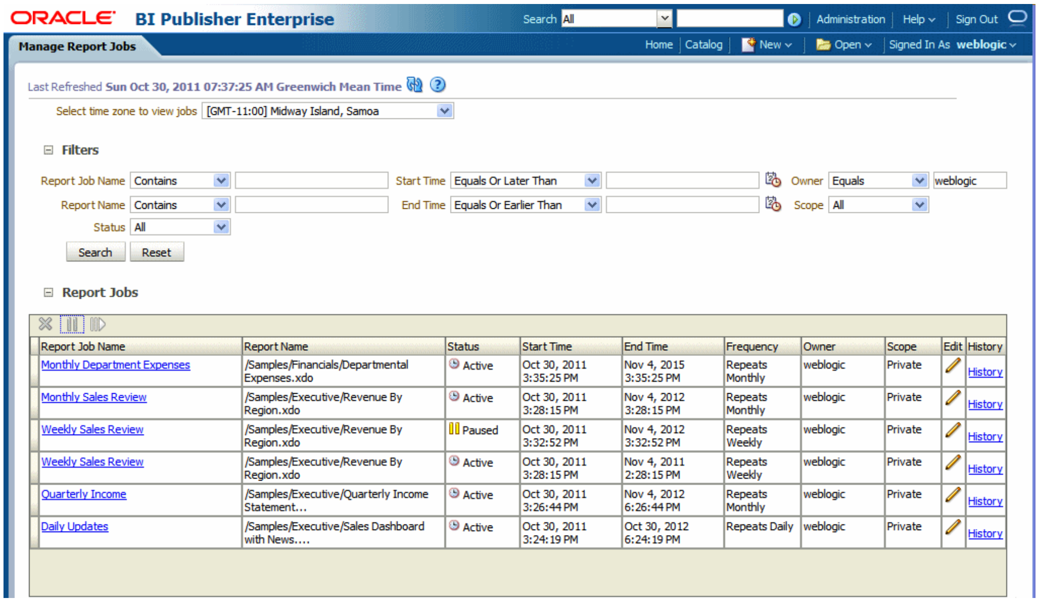
- From the Home Page: Under **Browse/Manage** click **Report Jobs**
- On the global header: Click **Open**, and then click **Report Jobs**

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



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

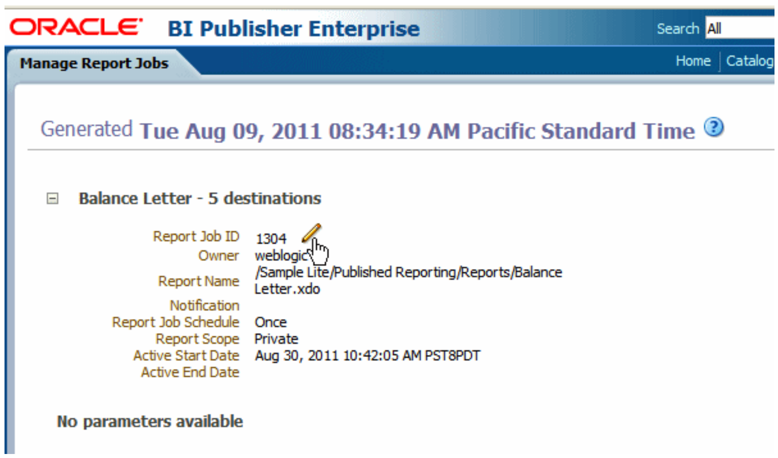
To delete a job:

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:



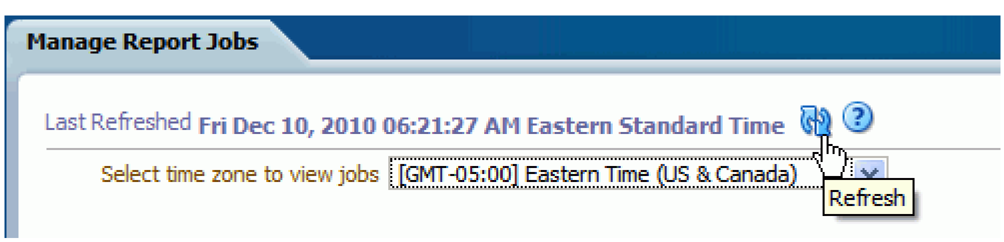
2. Edit the job details using the General, Output, Schedule, and Notification tabs.
3. Click **Update Job** to save your changes to this job; or, to save the edited job as a new job, click **Submit as New** and enter a name for the new job.

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



6 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:

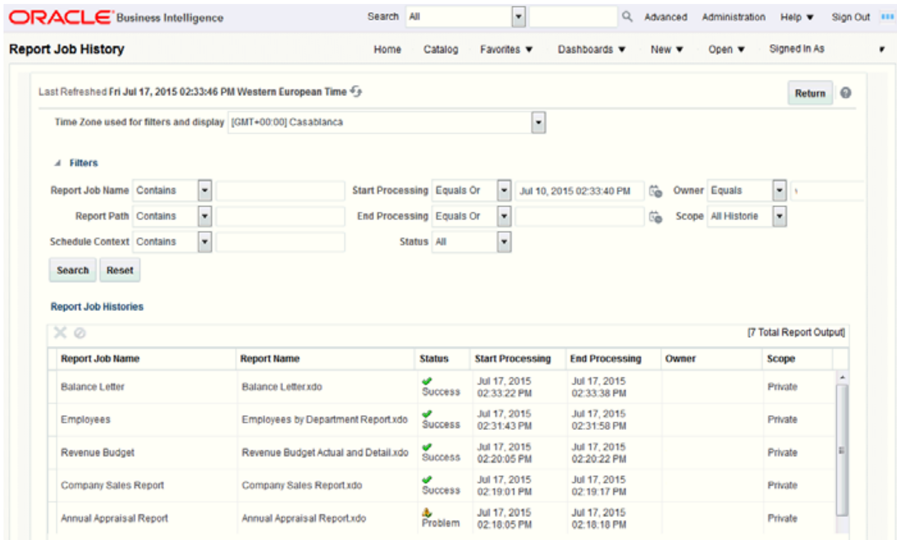
- From the Home Page: Under **Browse/Manage** click **Report Job History**
- On the global header: Click **Open**, and then click **Report Job History**

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



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 statuses:
     - Success - the job completed without errors
     - Failed - the job failed
     - Running - the job is currently running
     - Has output errors - the job completed, but with errors
     - Cancelled - the job was cancelled
     - Cancelling - the job is in the process of being cancelled
     - Delivery has error - the job cannot be delivered
     - Skipped - the job was skipped

     For more information on error statuses, see Section 6.10, "Getting Error and Warning Information for Reports."
   - 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.

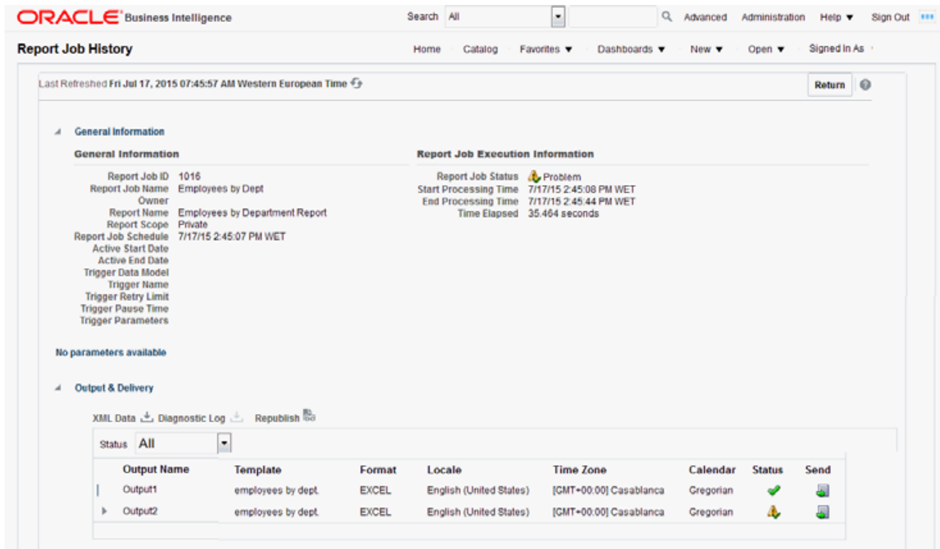
   You can sort the table by a particular column by clicking the column heading and selecting the up arrow or down arrow for ascending or descending.

6.4 Viewing Details of a Job History

To view details of a job history:

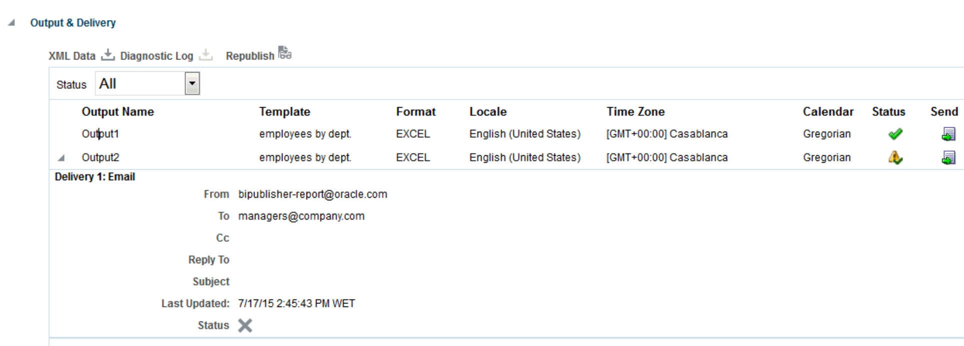
1. Click the **Report Job Name** to view a detail page for the job, as shown in Figure 6–2.

Figure 6–2 Job Detail Page



2. 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



3. 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

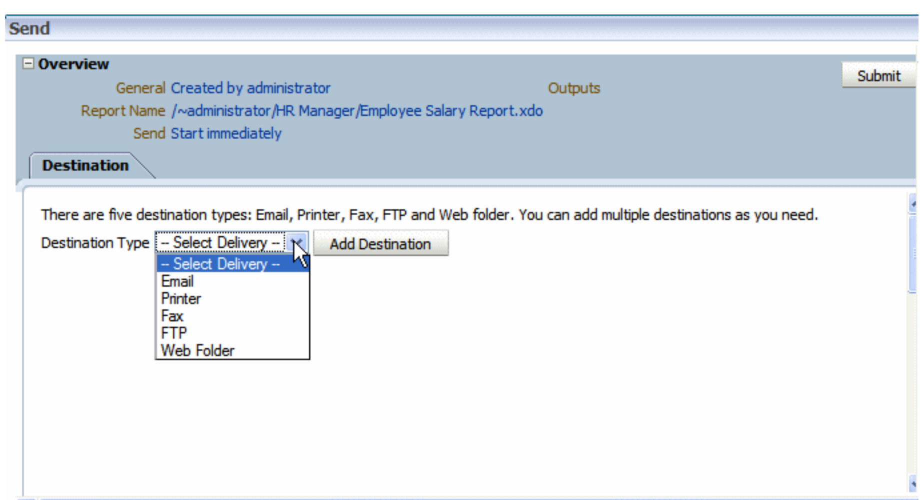
For the output to be available from the history table, the **Save Output** option must be enabled when the job is created. For more information on setting this option, see Section 4.3, "Setting Output Options."

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



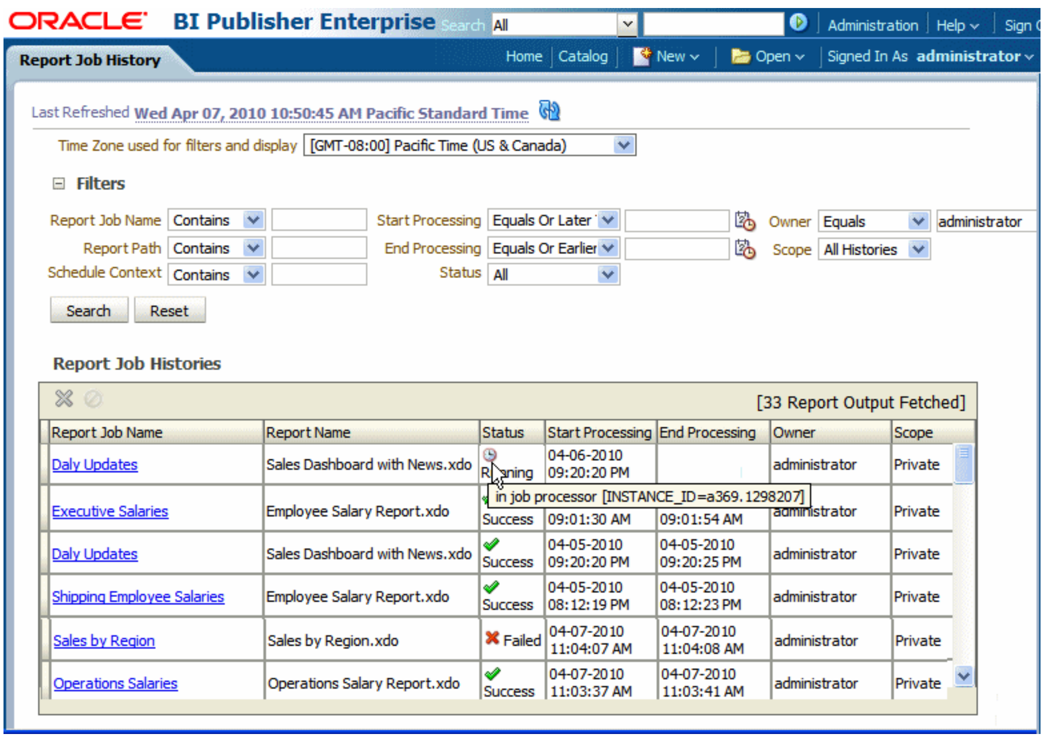
3. Select the delivery type and click **Add Destination**. Enter the appropriate fields for your delivery type.
4. When finished adding destinations, click **Submit**.

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

Table 6–1 (Cont.) Processing Stages of Jobs

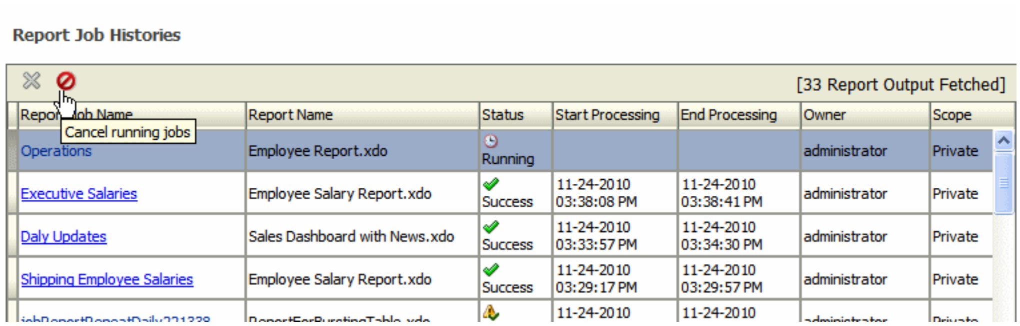
Processing Stage	Substages
Data Fetching	Fetching XML Data XML Data Fetched Before calling data model pre-trigger After calling data model pre-trigger Before calling data model post-trigger After calling data model post-trigger
Fetching Bursting Control File (for bursting jobs only)	Fetching bursting 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.
2. Click the **Cancel running jobs** icon at the top of the table, as shown in Figure 6–6.

Figure 6–6 Canceling Running Jobs

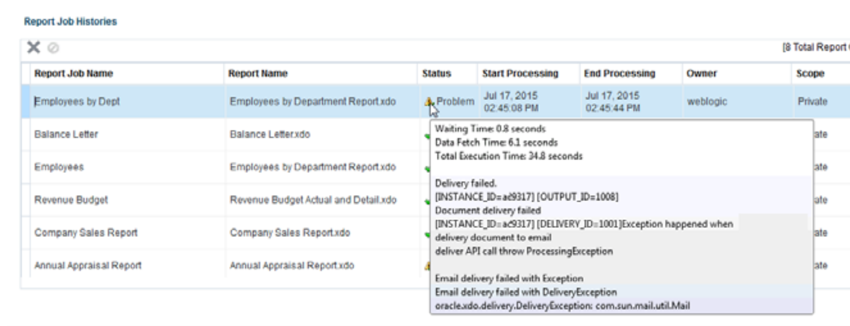


3. Click **OK** on the confirmation dialog.

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. A sample message is shown in Figure 6–7.

Figure 6–7 Sample Error Message



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

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

6.11 Deleting a Job History

To delete a job history:

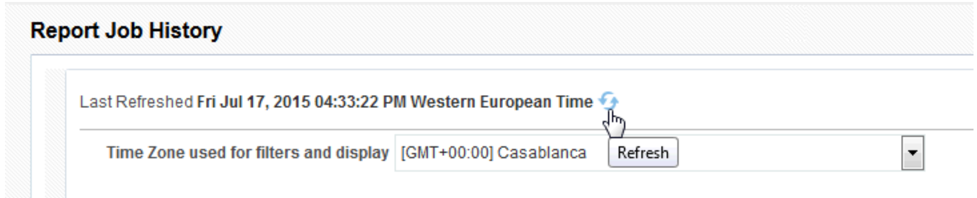
1. Click anywhere within the table row for the report job to select it. You can select multiple rows.
2. Click the delete icon at the top of the table.
3. Click **OK** on the confirmation dialog.

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



7 Managing Reports

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

This chapter includes the following sections:

- Section 7.1, "Overview of the BI Publisher Folders"
- Section 7.2, "Reporting Components 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 BI Publisher Folders

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 folders store the reports, data models, and style templates, that you create using Oracle BI Publisher. You and every other user has 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 content in the way that is most logical to you.

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.

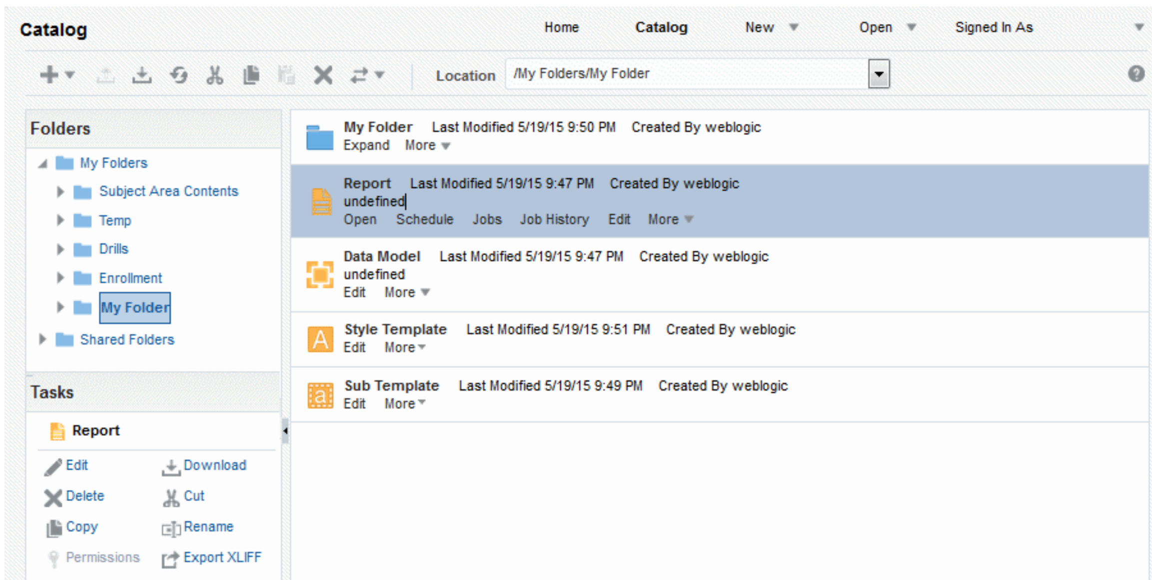
7.2 Reporting Components Stored in the Catalog

The following reporting components are shown in the catalog:

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

As shown in Figure 7–1, 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.

Figure 7–1 Reporting Components and Their Icons



For more information, see Section 7.4, "Performing Tasks on Catalog Objects."

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.

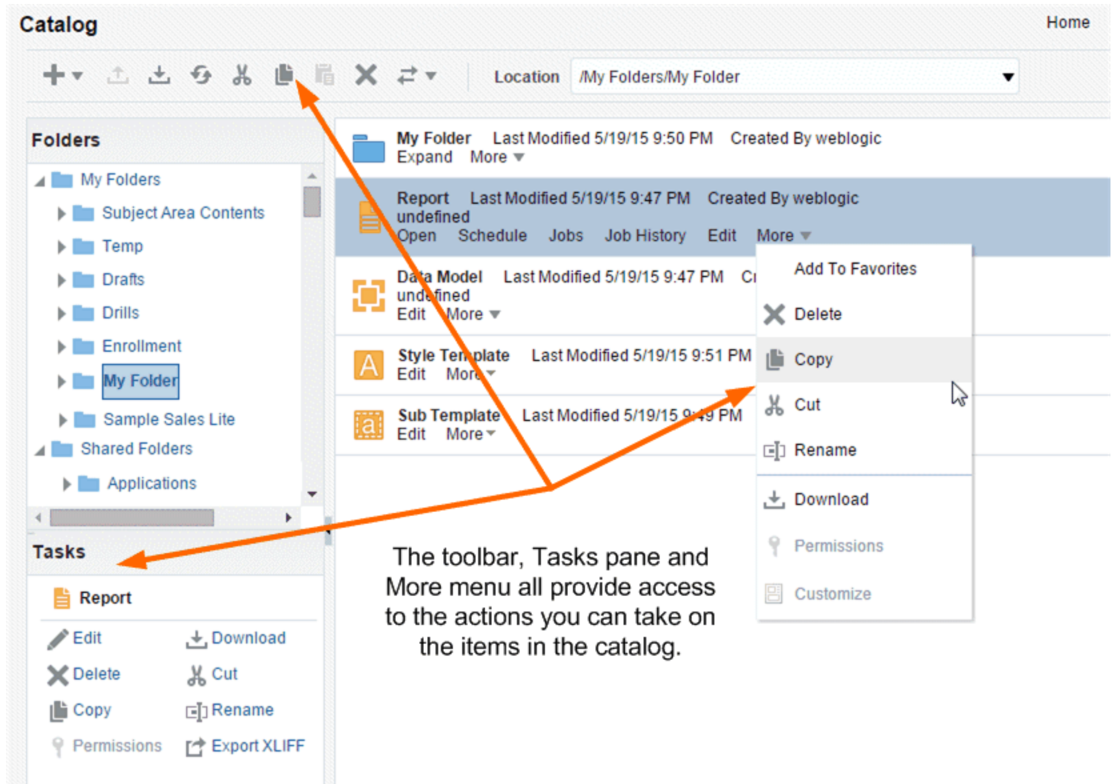
To create a folder:

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. For more information, see "About Catalog Permissions" in *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.
- **Customize** - use this option only when your enterprise has implemented a customization process that includes the use of the Custom folder. For more information, see "About Customizing Reports" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

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. For more information, 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. For more information, see "Managing Objects in the Oracle BI Presentation Catalog" in *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

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, the references to the resource are broken and the report will no longer run as expected.

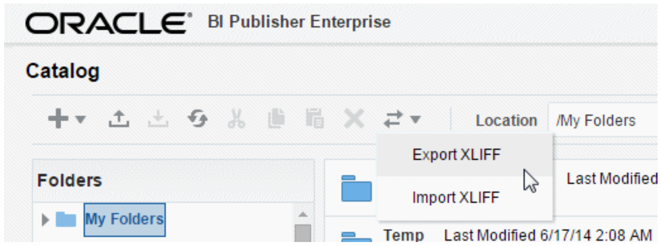
For example, if you have a report that was created with a data model that resides in a folder called My Data Models, if you move the data model to another folder, the report will not run because the report definition is expecting the data model to be in My Data Models.

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

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 "Adding Translations for the BI Publisher Catalog and Reports" in *Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher*.

A

Accessibility Features

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

This appendix includes the following sections:

- Section A.1, "What are Accessibility Features?"
- Section A.2, "Changing to Accessibility Mode"
- Section A.3, "Accessibility Support in the BI Publisher User Interface"
- Section A.4, "Accessibility Support in BI Publisher Report Output"
- Section A.5, "Keyboard Shortcuts"

A.1 What are Accessibility Features?

The accessibility features in BI 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 "Changing to Accessibility Mode".
- Keyboard shortcuts that make it easier to navigate content for users with limited or no ability to use a mouse.

  For more information, see "Keyboard Shortcuts".
- Content design capabilities that make it possible for content creators to create content that supports users with accessibility needs.

  For more information, see "Designing for Accessibility" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

A.2 Changing to Accessibility Mode

Accessibility mode in BI Publisher makes the rendering of the user interface more compatible with screen readers while allowing only that functionality that is supported for users with disabilities to be visible. The following list provides information on accessibility mode:

- The Home page does not contain links for accessing the Administration page or for performing most editing functions.
- Graphs and map views are not 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.

  Refer to your assistive-technology documentation for all applicable table navigation shortcuts.
- You cannot use the mouse to modify the layout of a table or pivot table.

By default, BI Publisher does not 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.

To enable accessibility mode using keystrokes after sign in:

1. 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.

A.3 Accessibility Support in the BI Publisher User Interface

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

A.3.1 Signing In Using Keystrokes

Use the following procedure to sign in to BI Publisher using keystrokes rather than the mouse.

To sign in to BI Publisher using keystrokes:

1. In a browser, display the Sign In page for BI Publisher.
2. To change the language that BI Publisher uses 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. The insertion point is then placed in the **User ID** field.
3. Enter the ID and press Tab to place the insertion point in the **Password** field.
4. Enter the password.
5. To render BI 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.

A.3.2 Navigating the Home Page

If you display the Home page after signing in to BI Publisher or by navigating from another location in BI 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.

To navigate the Home page with keystrokes:

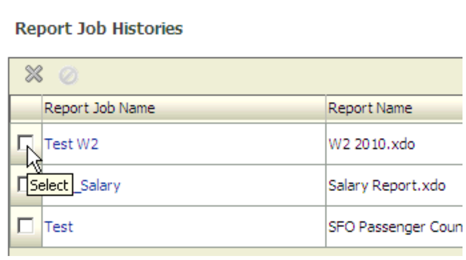
1. Sign in to BI Publisher, as described in "Signing In Using Keystrokes".
2. Press CTRL+ALT+G to display the **Skip to Content** link in the upper-left corner of the Home page.
3. Press one of the following keys:
   - ENTER on this link to navigate to the default starting location on the Home page, which is the first link in the upper-left corner under the global header.
   - TAB to navigate to the first focusable element in the global header.
4. Continue to press TAB to navigate through the elements on the Home page.

A.3.3 Navigating Multiple Rows in Tables

When accessibility mode is turned on, each table row contains a **Select** check box to assist you in working with multiple rows in a table. For example, you can use the Select check boxes on the Report Job Histories page as shown in Figure A–1 to select multiple report jobs for deletion.

If you position the cursor in the Select check box in a row, you can also use the Up/Down keys to navigate between table rows.

Figure A–1 Select check box



A.4 Accessibility Support in BI Publisher Report Output

The HTML generated from RTF or layout editor based reports is accessible.

Reports designed to be accessible 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 table header rows are read in accessibility mode

For more information, see "Designing for Accessibility" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

A.5 Keyboard Shortcuts

Both Oracle BI EE and BI Publisher support 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. Table A–1 describes general keyboard shortcuts for use with Oracle BI EE and BI Publisher.

Table A–1 General Keystrokes

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.

Table A–2 describes keyboard shortcuts for navigating reports in BI Publisher.

Table A–2 Keyboard Shortcuts for Navigating in BI 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.