Getting Started with Oracle Business Intelligence Publisher

Purpose

This tutorial mainly covers how to get started with Oracle Business Intelligence Publisher, and how to create highly formatted reports using BI Publisher based not only on conventional data sources (such as Oracle Database) but also on various other data sources (such as Web Services, RSS feeds, and so on). It also covers how to create reports with parameters and list of values (LOVs).

Because BI Publisher is integrated with Oracle Business Intelligence Enterprise Edition, you will learn how to create reports based on Oracle BI subject area and Oracle BI Answers request. You will also learn how to create RTF templates in MS Word by connecting to BI Publisher, and publish these templates for the reports to view data in BI Publisher. You will learn to configure the BI Publisher scheduler to schedule reports and view the saved data.

Time to Complete

Approximately 1 hour

Topics

This tutorial covers the following topics:

- Overview
- Scenario
- Prerequisites
- Getting Started
  - Logging In to Oracle BI Publisher
  - Setting Preferences
- Creating a BI Publisher Report Based on Oracle Database
- Creating Report Layouts Using BI Publisher Desktop (Template Builder) in MS Word
  - Creating an RTF Template with a Table and a Chart
  - Publishing the Template for a BI Publisher Report
  - Formatting Template Using MS Word Native Features
  - Creating and Publishing Multiple Templates for a Report
  - Publishing the Template for a BI Publisher Report
- Creating a Report with Parameters and List of Values
- Scheduling BI Publisher Reports
  - Configuring the BI Publisher Scheduler
  - Scheduling and Viewing Saved Output
- Creating BI Publisher Reports Based on Various Data Sources
  - Creating a Report Based on Oracle BI Answers Request
  - Creating a Report Based on Oracle BI Server Subject Area
  - Creating a Report Based on Web Services
  - Creating a Report Based on HTTP Data Set
  - Creating a Report Based on File Data Set
- Summary
- Related Information

Viewing Screenshots
Overview

Oracle BI Publisher (formerly known as XML Publisher) is a revolutionary reporting and document output management solution from Oracle. Oracle BI Publisher report formats can be designed using Microsoft Word or Adobe Acrobat, the tools that are easy to use, and most users are already familiar with. Oracle BI Publisher also allows you to create reports from multiple data sources.

Oracle BI Publisher can be used as a stand-alone reporting product or integrated with the Oracle Business Intelligence Suite Enterprise Edition. You will start by logging in to BI Publisher and create reports from various data sources, such as Oracle Database, Web services, RSS feeds, and Files. You will also create parameterized report that uses LOVs.

Because BI Publisher is integrated with Oracle BI Enterprise Edition, you can also create the BI publisher reports based on Oracle BI Answers request, and also based on Oracle BI Server subject area. However, these topics are briefly discussed in this tutorial. For more details, you can refer to the OBE titled "Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2."

Also, you will be guided through the steps to create and publish RTF templates in MS Word by connecting to BI Publisher. You will also schedule the report, and view the saved data.

Scenario

You will be using various data sets for this OBE. For example, you will create a simple employee salary report based on the human resources (HR) sample schema of the Oracle Database. For the File data set, you will use the demo files and templates that are provided with BI Publisher. For the BI Answers request and BI Server subject area, SH.rpd is used, which is based on the SH schema of the database, and so on.

To continue with the steps listed in the topics, you should have installed the required software and performed the other setup as mentioned in the following topic, Prerequisites.

Prerequisites

Before starting this tutorial, you should:

1. Have access to or have installed Oracle Database 10g (preferably version 10.2)
2. Have access to or have installed the sample schemas (HR, OE, and SH specifically)

3. Have access to or have installed Oracle BI Publisher and Oracle BI Publisher Desktop 10.1.3.2.

You can install BI Publisher Desktop by clicking the **Template Builder** link in BI Publisher:

![Oracle BI Publisher Enterprise](image)

When you have successfully installed BI Publisher Desktop, the BI Publisher menu and BI Publisher toolbars are displayed in MS Word.

**Note:** Oracle BI Publisher Desktop was formerly known as Template Builder, and is mainly used for building the RTF templates for BI Publisher reports in MS Word.

4. Have created a user for installing the BI Publisher scheduler schema tables by performing the following:

```
SQL> create user bipsched identified by bipsched
default_tablespace users
temporary_tablespace temp
quota unlimited on users;
```
SQL> grant connect, resource to bipsched;

Note: The name of the user can be any appropriate name.

5. Have set up the proxy parameters (to avoid any firewall problems with the Web Services and RSS data set reports) in the xmlpserverstart.bat file or the oc4j.cmd file as per your installation. Modify the following line, which defines JAVA_HOME. (Observe the proxy parameters in bold.):

- "%JAVA_HOME%/bin/java" %JVMARGS% -jar -Dhttp.proxyHost= <myproxy.mycompany.com> -Dhttp.proxyPort=<Port> "%OC4J_JAR%"
  %CMDARGS%
- Restart xmlpserver or oc4j as the case may be.

If you want to create reports based on Oracle BI Answers request and Oracle BI Server subject area, then you should also:

1. Have access to or have installed Oracle BI EE 10.1.3.2 including Oracle BI Publisher and Oracle BI Publisher Desktop 10.1.3.2.

   You can follow the instructions as listed in the OBE "Installing the Oracle Business Intelligence Suite Enterprise Edition on Windows."

2. Have created an ODBC connection to the Oracle Database, and set up the SH.rpd metadata repository by following the steps listed in the OBE "Creating Interactive Dashboards and Using Oracle Business Intelligence Answers." Also, it is strongly recommended that you go through this tutorial to know the steps involved in creating an Answers request, creating a dashboard page, and so on.

3. Have set up the integration between BI Publisher and Oracle BI EE:
   If you have included BI Publisher Enterprise, when you installed Oracle BI Enterprise Edition, then Oracle BI installer will set up the integration with the Presentation Services, by setting host name, port, and URL values. However, you need to set the Administrator password from the BI Administration tool as follows:

   1. Select All Programs > Oracle Business Intelligence > BI Administration.
   2. Select Open > Online. (To open SH.rpd online, enter Administrator as User name and leave the Password field blank.)
   3. Select Manage > Security > Users > Administrator, and check out the Administrator user.
   4. In the properties, set the password for the Administrator user and click OK.
If the Integration with Presentation Services is not set up at the time of Oracle BI EE installation, you can also set up this integration from BI Publisher as follows:

1. From the Admin page, under Integration, select Oracle BI Presentation Services.
2. Enter the following information about your BI Presentation Services server:
   - Server Protocol – Select http or https
   - Server Version – Select v4
   - Server – Enter the server host name (for example, server01.mycompany.com)
   - Port for the server – The default port is 9704.
   - Administrator Username and Password
   - URL Suffix – The default value is analytics/saw.dll.
Getting Started

For getting started with BI Publisher, perform the steps listed in each of the following subtopics:

☐ Logging In to Oracle BI Publisher
☐ Setting Preferences

Logging In to Oracle BI Publisher:

To log in to BI Publisher, perform the following steps:

1. Enter the URL for BI Publisher in a browser window which is of the format: http://<hostname>:/<port>/xmlpserver/ (for example, http://localhost:9704/xmlpserver/)
The Log In screen for the BI Publisher appears. Enter Administrator as the Username and Password. Click Sign In.
**Note:** Ensure that you have the correct password for the Administrator user in BI Publisher, else you may face problems in logging in to BI Publisher.

Also, on Windows, depending on the type of installation you have done, you can invoke BI Publisher as follows:

- If you have installed BI Publisher along with Oracle BI Enterprise Edition, then you can select **All Programs > Oracle Business Intelligence > BI Publisher** from the **Start** menu.
• If you have installed BI Publisher in stand-alone mode, then select **All Programs > Oracle - OracleHome > BI Publisher Server** from the **Start** menu.  
  
  *OracleHome* - refers to Oracle Home name, where you installed Oracle BI Publisher.

2. This displays the Welcome screen for BI Publisher.
As you have logged in as the Administrator, the welcome page displays the Reports, Schedules, and Admin tabs. For the users who do not have administrator privileges, the Admin tab is not displayed.

Setting Preferences

To change the preferences, perform the following steps:

1. Click Preferences link. (highlighted in the screen below):
The **Preferences** screen is displayed with the **General Preferences** and **Account** tabs.

2. Observe the options on the **General Preferences** tabbed page, and select the appropriate options for **UI Language**, **Reports Locale**, **Reports Time Zone** according to your requirements. Click **Apply**.
3. To edit the password settings for the Administrator account, click the Account tab. Change the password for Administrator as required by entering the current and new passwords in the screen. Click Apply to save the preference settings.

Note: If you have installed BI Publisher along with Oracle BI Enterprise Edition, for the integration between these to work, for any given user account, you should set the same password in BI Administration Tool and in BI Publisher. (Refer to Prerequisites section for setting up integration between BI Publisher and Oracle BI EE.)
Creating a BI Publisher Report Based on Oracle Database

In this topic, you will create an employee salary report based on the HR schema of Oracle Database. To create a BI Publisher report based on a query directed to Oracle Database, perform the following steps:

1. Before you create a query based on Oracle Database, you need to define the connection details in the Admin tab. Click the Admin tab. Click JDBC Connection found under the Data Sources section of the page.

2. In the JDBC Data Sources screen that is displayed, click demo to edit the connection details for this data source.
3. In the **Update Data Source** screen, enter the following details:
   **Connection String**: This is of the format: `jdbc:oracle:thin:@<Host name>:<Port>:<SID>`, for example, a sample connection string may look like: `jdbc:oracle:thin:@myhost:1521:orcl`
   **User Name**: oe
   **Password**: oe
   **Database Driver Class**: `oracle.jdbc.driver.OracleDriver` (This is the default.)

   Do not click Cancel or Apply.
4. After entering the above details, click **Test Connection**. When the confirmation message is displayed saying that the connection is established successfully, click **Apply** to save the connection details.
5. Click Reports to go back to the Reports page.
   Click My Folders, and click Create a New Folder link (found in the Folder and Report Tasks section).
   Enter Learn as the folder name and click Create. (You will save the reports you create in this tutorial in this folder.)
6. To create report based on Oracle Database, navigate to **My Folders > Learn**, and click **Create a New Report**.

Enter **Based on OracleDB** as the name of the report, and click **Create**.
7. The report is displayed in the Learn folder in BI Publisher. Click the **Edit** link under the name of the report to open the report in Edit mode.

8. In the **General Settings** section of the **Report Properties**, select **demo** from the **Default Data Source** drop-down list. Click the **Save** icon (found at the top-left corner) to save the changes.
9. Click **Data Model** and click **New** to define the data source for this report.

10. In the **Data Set** screen that appears, ensure that **SQL Query** is selected as **Type**, and **demo** is selected as **Data Source**.
    Select the **Cache Results** check box, and click **Query Builder** to define the query.
11. The **Query Builder** screen appears, ensure that **HR** is selected from the Schema drop-down list. This displays objects from HR schema on the left. Click **EMPLOYEES** and **DEPARTMENTS** tables to add them to the **Model canvas** on the right.
12. Define a join between these two tables as follows:
   Click the box beside the **DEPARTMENT_ID** column in the **DEPARTMENTS** table. (See the following screens.)
   Similarly click the box beside the **DEPARTMENT_ID** column in the **EMPLOYEES** table.
   These boxes when marked for joins turn to light gray.
   Also note that a fine line joining the tables appears in the Model canvas.

   **Hint:** Take the help of the screens below:
13. Select the following columns from the tables (by selecting the check boxes beside the column names):
- Select **FIRST_NAME, LAST_NAME, HIRE_DATE, and SALARY** columns from the **EMPLOYEES** table
- Select **DEPARTMENT_NAME** from the **DEPARTMENTS** table. (See the following screen.)
14. Click **Conditions**, and move the **DEPARTMENT_NAME**, to appear first in the list (as shown in the screen below).

You can use these icons beside each column to move the columns up or down.

Similarly, move **SALARY** and other columns, so that the final list appears like this:
15. Click **Results** to see how the query results appear in Query Builder. Click **Save** to save the query.

16. This will take you back to the **Data Set** screen, with the query you created reflected in the **SQL Query** text area.
   Click **Save** to save the BI Publisher report.
17. If required, you can further edit the query manually. For example, instead of displaying the FIRST_NAME and LAST_NAME columns separately, you may want to concatenate both these columns and display this as a single column EMPLOYEE_NAME. So you can modify the query as:

```sql
select DEPARTMENTS.DEPARTMENT_NAME as DEPARTMENT_NAME,
    EMPLOYEES.FIRST_NAME || ' ' || EMPLOYEES.LAST_NAME as EMPLOYEE_NAME,
    EMPLOYEES.HIRE_DATE as HIRE_DATE,
    EMPLOYEES.SALARY as SALARY
from HR.DEPARTMENTS DEPARTMENTS,
     HR.EMPLOYEES EMPLOYEES
where DEPARTMENTS.DEPARTMENT_ID = EMPLOYEES.DEPARTMENT_ID
```
18. Click **View** to view the report. Because you have not defined a template, you can view only XML data.

Click **View** again to view the XML data.
Creating Report Layouts Using BI Publisher Desktop (Template Builder) in MS Word

In this topic, you create RTF template for a BI Publisher report and publish it. You will also work with multiple templates for a report, and view the report data using these templates in various formats.

Note: All the subtopics in this topic are continuous, so follow the instructions, and do not close any applications or windows as mentioned in the steps.

- Creating an RTF Template with a Table and Chart
- Publishing the Template for a BI Publisher Report
- Formatting the Templates Using MS Word Native Features
- Creating and Publishing Multiple Templates for a Report
- Viewing Report Data in BI Publisher Using Templates
Creating an RTF Template with a Table and Chart

1. Start the MS Word application from the program menu. From the Oracle BI Publisher menu, select Log On.

   ![MS Word interface with Oracle BI Publisher menu]

   Note: The Oracle BI Publisher menu is displayed in MS Word only when you have successfully installed the Oracle BI Publisher Desktop as mentioned in step 3 of the Prerequisites section. Also, observe the BI Publisher toolbar in MS Word, with the Data, Insert, Preview, Tools, and Help menus. Observe the various options in these menus.

2. In the Login screen that appears, enter Administrator as the Username and Password, and click Login.

   The first time when you connect, you may be asked for the report server URL, enter the URL which is of the format:
   
   http://<Host>:9704/xmlpserver
3. This displays the **Open Template** window. Ensure that **BI Publisher** is selected from the **Workspace** drop-down list.

Navigate and select the **Based on Oracle DB** report that you have created from **My Folders > Learn**. Click **Open Report**.

**Note:** When you open the report you will not see any data in the MS Word document, but this will load the
XML data definitions from the query to facilitate the defining of a template.

4. In the Word document that loads this report, select **Insert > Table Wizard** on the BI Publisher toolbar to define a format for the table data in the query.

5. This displays the **Table Wizard**. Select **Table** and click **Next**.
6. In the next step, ensure that **ROWSET/ROW** is selected as the **Grouping Field**, and click **Next**.

7. In the next step, click >>> to include all the available columns in the table. (See the screen below.) Click **Next**.
8. In the next step, select **Department Name** from the **Group By** drop-down list, ensure that the **Group above** option is selected, and accept the defaults for other options. Click **Next**.

![Table Wizard](image1)

9. In the next step, select **Salary** from the **Sort By** drop-down list, and select the options **Descending** and **Number** to sort the Salary column in descending order. Click **Next**.

![Table Wizard](image2)
In the next step you can edit the labels of the columns as required. Accept the defaults and click **Finish**.

The template you created looks like this:

```
<table>
<thead>
<tr>
<th>DEPARTMENT_NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
</tr>
<tr>
<td>EMPLOYEE_NAME</td>
</tr>
</tbody>
</table>
```

**Important Note:** The BI Publisher Desktop Template Builder has just created a table for you. Notice the words and letters with the gray background. These are called form fields. Form fields are Word objects that allow you to reference other data (for example, a mail merge letter). BI Publisher uses form fields in two ways:

- First is to reference data fields from the report definition (like YEAR and MONTH).
- The second use is to embed instructions that control how the data fields will be laid out (like G-Group By, F- For Each, and E- End).

If you are curious to know what these instructions are, double-click the form field and view the Help text. It is important to treat these form fields carefully and not accidentally delete or move them. Doing so will change the layout of the table in your report. Also, you can add or modify your own form fields with XSL commands to do more sophisticated things with the table layout.
Also, you can additionally use MS Word's native formatting features on this template, such as changing the background and text colors, adding a title, and so on. This is covered in the next topic.

11 You can also add a chart in the template. For example, you can add a chart to display the average employee salaries by department in this report.

To add a chart to the template, select **Insert > Chart**.

12 In the **Chart** window that appears, define the graph characteristics by following the instructions listed below carefully:

1. Drag **Salary** to the **Values** field and **Department Name** to the **Labels** field. Also, select **Average** from the **Aggregation** drop-down list for the **Salary**. (These are highlighted in the screen below.)
2. Select **Pie Chart** from the **Type** drop-down list for the graph.
3. Click **Preview** to preview how the graph looks like, and click **OK**.
Note: If you do not like the style and type of the graphs in the preview, you can change them after the preview or later.

13 Now the template along with the graph in the Word document looks like this:

<table>
<thead>
<tr>
<th>DEPARTMENT_NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Name</td>
</tr>
<tr>
<td>----------------</td>
</tr>
<tr>
<td>EMPLOYEE_NAME</td>
</tr>
</tbody>
</table>

14 Select the File> Save As option. Enter Based_On_OracleDB.rtf as the name of the template, and click Save.

Do not close the file or log out of BI Publisher.
Note: You can save the file in any local folder on your system, but you have to save the template in the .rtf format (not in the .doc format).

15 You can also preview how the template looks like with the data by selecting

- **Oracle BI Publisher** > **Preview Template**, and then selecting a format like **PDF** to view the data.

The data looks like this:
The graph looks like this:

<table>
<thead>
<tr>
<th>Accounting</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Name</strong></td>
<td><strong>Hire Date</strong></td>
<td><strong>Salary</strong></td>
</tr>
<tr>
<td>Shelley Higgins</td>
<td>1994-06-07T00:00:00.000+05:30</td>
<td>12000</td>
</tr>
<tr>
<td>William Gietz</td>
<td>1994-06-07T00:00:00.000+05:30</td>
<td>8300</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Administration</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Name</strong></td>
<td><strong>Hire Date</strong></td>
<td><strong>Salary</strong></td>
</tr>
<tr>
<td>Jennifer Whalen</td>
<td>1987-09-17T00:00:00.000+05:30</td>
<td>4400</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Executive</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee Name</strong></td>
<td><strong>Hire Date</strong></td>
<td><strong>Salary</strong></td>
</tr>
<tr>
<td>Steven King</td>
<td>1987-06-17T00:00:00.000+05:30</td>
<td>24000</td>
</tr>
<tr>
<td>Neena Kochhar</td>
<td>1989-09-21T00:00:00.000+05:30</td>
<td>17000</td>
</tr>
<tr>
<td>Lex De Haan</td>
<td>1993-01-13T00:00:00.000+05:30</td>
<td>17000</td>
</tr>
</tbody>
</table>
Publishing the Template for a BI Publisher Report

You can directly publish a template that you have created in MS Word for a BI Publisher report, provided:

- You are connected to BI publisher from MS Word
- The BI Publisher report is opened in MS Word
- The template is saved in RTF format

To publish the **Based_On_OracleDB.rtf** template that you created in MS Word, and then view data for the report in BI Publisher using this template, perform the following steps: (Note that the template you have created satisfies all the above criteria.)
1. In MS Word, select the **Oracle BI Publisher > Publish Template As** option.

**Note:** If you have not saved the template in RTF format, it may prompt you to save the template in RTF format first before publishing.

2. The **Upload as new** dialog box appears.
Enter **Template1** as the template name, and click **OK**.
After the template is uploaded, it displays the following message indicating that the template is added to the BI Publisher report. Click OK again.

Formatting the Template Using MS Word Native Features

In this topic, you will modify the Based_On_OracleDB.rtf template that you have created using the MS Word native features, such as changing the background and text colors, adding a title, and so on.

Perform the following steps:

1. The basic Based_On_OracleDB.rtf template that you have created is shown below:
Make the following changes using the MS Word features:

1. Change the fonts for all the fields, that is Department Name, Employee Name, Hire Date, and Salary to Arial.
2. Select 12 as the font size for the Department Name, and 10 as the font size for other fields.
3. Change the text color for the Department Name field to dark blue, highlight the background for this field by cyan, and make it Bold.
4. Also ensure that the Employee Name and Hire Date (text and date fields) are left justified, and the Salary (Number) filed is right justified. Use the align left and align right icons on the toolbar.

The table in the template should look like the screen below after these changes:
2. Edit the **Hire Date** field to add the appropriate format as follows:

1. Double-click the text field for **Hire Date** below the column header. (See the screen below.)

2. In the **Text Form Field Options** dialog box that appears, select **Date** from the **Type** drop-down list, select **m/dd/yyyy** from the **Date format** drop-down list, and click **OK**.

3. Similarly, edit the **Salary** field now to add an appropriate format as follows:

1. Double-click the **Salary** field below the column header.
2. In the **Text Form Fields** dialog box that appears, select **Number** from the **Type** dropdown list, enter the **Default Number** as 99,999,999.99, select the format that has a $ in the beginning as shown, and click **OK**.

Now the table in the template should look like this:

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Sala</th>
</tr>
</thead>
<tbody>
<tr>
<td>F EMPLOYEE NAME</td>
<td></td>
<td>$99,999,999.99</td>
</tr>
</tbody>
</table>

4. Add a title **Employee Salary Report** to the template, and format the text color and fonts as you require. You can also add an image or a clip art to the template. (Resize it to fit your template better.)

You can also insert a header or footer in template. Observe the following screen:
5. Save the file as **Based_On_OracleDB_1.rtf**.
   (Do not close the file or log out of BI Publisher.)
Creating and Publishing Multiple Templates for a BI Publisher Report

In the previous topic, you have already created another template `Based_On_OracleDB_1.rtf` for the `Based on Oracle DB` report, for which you have already published a simple template. You can create many templates with different formats and styles, and publish them for a single report.

To publish the `Based_On_OracleDB_1.rtf` template created from MS Word, perform the following steps:

1. (If not already opened) Open the `Based on OracleDB` BI Publisher report as follows:
   - In MS Word, select the **BI Publisher** > **Open Template** option.
   - Open the `Based on OracleDB` report from the path **My Folders** > **Learn**.
2. In MS Word, select the **Oracle BI Publisher** > **Publish Template As** option.
3. This opens the **Upload as new** dialog box. Enter **Template2** as the template name, and click **OK**.

![Upload as new dialog box](image)

After the template is uploaded, it displays the following message. Click **OK** again.

![Microsoft Word](image)

**Note:** You have added two different templates for the same report **Based on OracleDB**. You can modify the template file, and publish it as different template each time you modify.

4. **If you have time**, perform the following steps to edit the chart in the template file to change the graph style, and publish it as **Template3**:
Right-click the chart in the template and select **BI Publisher Chart** to edit the chart:

Ensure that **Average** is selected as the **Aggregation** for the **Salary**, select **Regatta** as the graph **Style**, and add **Average Employee Salaries by Department** as the **Title**. Click **Preview**, and then click **OK**.
5. Select the **Oracle BI Publisher > Publish Template As** option, and publish the modified template as **Template3** (as shown in the screens below):

![Image of Oracle BI Publisher interface showing pie chart and options]

- **Upload as new** dialog box with template name set to **Template3**.
- **Microsoft Word** dialog box indicating that **Template3 was added to the report Based on OracleDB**.

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**Viewing Report Data in BI Publisher Using Templates**

1. (If not logged in) Log in to Oracle BI Publisher as **Administrator**.
2. Navigate to My Folders>Learn, and click the View link below the Based on OracleDB report.

3. You can see that the report is displayed using Template1 that you have published. Also, you can see the other templates that you have published for the report in the drop-down list.
Scroll down to see the table data in HTML format. A portion of the data is shown below:

| Template | Template1 | Template2 | Template3 |

### Accounting

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>ShelleyHiggins</td>
<td>1994-06-07T00:00:00.000+05:30</td>
<td>12000</td>
</tr>
<tr>
<td>WilliamGetz</td>
<td>1994-06-07T00:00:00.000+05:30</td>
<td>8300</td>
</tr>
</tbody>
</table>

### Administration

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>JenniferWhalen</td>
<td>1987-09-17T00:00:00.000+05:30</td>
<td>4400</td>
</tr>
</tbody>
</table>

### Executive

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>StevenKing</td>
<td>1987-06-17T00:00:00.000+05:30</td>
<td>24000</td>
</tr>
<tr>
<td>NeenaKochhar</td>
<td>1989-09-21T00:00:00.000+05:30</td>
<td>17000</td>
</tr>
<tr>
<td>LexDe Haan</td>
<td>1993-01-</td>
<td>17000</td>
</tr>
</tbody>
</table>

Scroll down to see the graph:
Note: You can also view the data in other formats, such as PDF, RTF, MS Excel, and so on.

4. Similarly, view the report data in PDF format using Template2 and Template3.

The data and graph in PDF format using Template2 are shown below:
# Employee Salary Report

## Accounting

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelley Higgins</td>
<td>6/7/1994</td>
<td>$12,000.00</td>
</tr>
<tr>
<td>William Gietz</td>
<td>6/7/1994</td>
<td>$8,300.00</td>
</tr>
</tbody>
</table>

## Administration

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jennifer Whalen</td>
<td>9/17/1987</td>
<td>$4,400.00</td>
</tr>
</tbody>
</table>

## Executive

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steven King</td>
<td>6/17/1987</td>
<td>$24,000.00</td>
</tr>
<tr>
<td>Neena Kochhar</td>
<td>9/21/1989</td>
<td>$17,000.00</td>
</tr>
<tr>
<td>Lex De Haan</td>
<td>1/13/1993</td>
<td>$17,000.00</td>
</tr>
</tbody>
</table>
The data and graph in PDF format using Template3 are shown below:
# EMPLOYEE SALARY REPORT

## Accounting

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelley Higgins</td>
<td>6/7/1994</td>
<td>$12,000.00</td>
</tr>
<tr>
<td>William Gietz</td>
<td>6/7/1994</td>
<td>$8,300.00</td>
</tr>
</tbody>
</table>

## Administration

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jennifer Whalen</td>
<td>9/17/1987</td>
<td>$4,400.00</td>
</tr>
</tbody>
</table>

## Executive

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Steven King</td>
<td>6/17/1987</td>
<td>$24,000.00</td>
</tr>
<tr>
<td>Neena Kochhar</td>
<td>9/21/1989</td>
<td>$17,000.00</td>
</tr>
<tr>
<td>Lex De Haan</td>
<td>1/13/1993</td>
<td>$17,000.00</td>
</tr>
</tbody>
</table>
Creating a Report with Parameters and List of Values

In this topic, you create a report with parameters and list of values.

To create a report with parameters and list of values, perform the following steps:

1. (If not logged in) Log in to BI publisher as Administrator, and navigate to My Folders> Learn.
   Click the report icon beside the Based on OracleDB report.
2. This displays additional report actions in **Folder and Report Tasks**.
   Click **Copy Report** and then click **Paste from Clipboard** to paste it in the same folder. (See the screens below):

   **Rename this copied report** **Report with Parameters and LOVs**.
3. Click the **Edit** link below the report to open the report in Edit mode.

4. This displays the SQL Query for the report on the right. Edit the query to add a bind variable dname in the query as in the following: (Observe the last line.)
select DEPARTMENTS.DEPARTMENT_NAME as DEPARTMENT_NAME,
EMPLOYEES.FIRST_NAME || ' ' || EMPLOYEES.LAST_NAME as EMPLOYEE_NAME,
EMPLOYEES.HIRE_DATE as HIRE_DATE,
EMPLOYEES.SALARY as SALARY
from HR.DEPARTMENTS DEPARTMENTS,
HR.EMPLOYEES EMPLOYEES
where DEPARTMENTS.DEPARTMENT_ID=EMPLOYEES.DEPARTMENT_ID
and DEPARTMENTS.DEPARTMENT_NAME =:dname

Click **Save** to save the query.

5. Click the **Parameters** node in the **Report** pane on the left and click **New** to create a parameter.
6. This displays the **Parameter** screen on the right, in which define the following:

Enter **dname** as the name of the parameter, and select **String** as the **Data Type**. Enter **Sales** in the **Default Value** field, and select **Text** as the **Parameter Type**. Also, enter **Enter Department Name** as the **Display Label**. (See the screen below.)

Click **Save** to save the changes to the report.

![Parameter Screen]

7. Click **View** to view the report data using **Template2** in PDF format. Note that the report data is displayed with the default parameter value, that is for **Sales** department.
8. You can enter the names of other departments to see the data.
   For example, in the parameter field enter **Shipping** as the department name and click **View** again to see the data for the **Shipping** department:

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Hire Date</th>
<th>Salary</th>
</tr>
</thead>
<tbody>
<tr>
<td>John Russell</td>
<td>10/1/1996</td>
<td>$14,000.00</td>
</tr>
<tr>
<td>Karen Partners</td>
<td>1/5/1997</td>
<td>$13,500.00</td>
</tr>
<tr>
<td>Alberto Errazuriz</td>
<td>3/10/1997</td>
<td>$12,000.00</td>
</tr>
<tr>
<td>Lisa Ozer</td>
<td>3/11/1997</td>
<td>$11,500.00</td>
</tr>
<tr>
<td>Gerald Cambrault</td>
<td>10/15/1999</td>
<td>$11,000.00</td>
</tr>
<tr>
<td>Ellen Abel</td>
<td>5/11/1996</td>
<td>$11,000.00</td>
</tr>
<tr>
<td>Eleni Zlokey</td>
<td>1/29/2000</td>
<td>$10,500.00</td>
</tr>
<tr>
<td>Clara Vishney</td>
<td>11/11/1997</td>
<td>$10,500.00</td>
</tr>
<tr>
<td>Peter Tucker</td>
<td>1/30/1997</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Janette King</td>
<td>1/30/1996</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Harrison Bloom</td>
<td>3/23/1998</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Tayler Fox</td>
<td>1/24/1998</td>
<td>$9,600.00</td>
</tr>
<tr>
<td>David Bernstein</td>
<td>3/24/1997</td>
<td>$9,500.00</td>
</tr>
<tr>
<td>Patrick Sully</td>
<td>3/4/1996</td>
<td>$9,500.00</td>
</tr>
</tbody>
</table>
9. Click **Edit** to edit the report and define a List of Values to be used with this parameter **dname**.

In the Report pane displayed on the left, click **List of Values**, and click **New** to create a new list of values.
10. In the **List of Values** screen that appears on the right, ensure that **demo** is selected as the **Data Source**, and click **Query Builder** to define a query for defining a list of values.

11. In the **Query Builder** screen that displays the **HR** schema tables on the left, click **DEPARTMENTS** to add it to the **Model** canvas on the right, and select **DEPARTMENT_NAME** column (by selecting the check box beside it). Click **Save**.
This takes you back to the **List of Values** screen again which displays the query. Click **Save** to save the changes to report:

```sql
SELECT DEPARTMENTS.DEPARTMENT_NAME AS DEPARTMENT_NAME
FROM HR.DEPARTMENTS DEPARTMENTS
```
12. Click dname under the Parameters node in the Report pane on the left to edit it and associate it with the List of Values that you have created:

13. In the Parameter screen that appears on the right, select Menu as the Parameter Type.

   In the Menu Setting section that appears below the General Settings section, enter Select Department Name: in the Display Label field, and ensure that the New List of Values 1 (that you created) is selected from the List of Values drop-down list.
Also, select the **Can select all** option to be able to see the data for all the departments.
Click **Save** to save the report.

![Parameter configuration](image)

14. Click **View** to view the report using Template2 in PDF format.
Observe that the dname parameter is now displayed in the report using the list of values for the department name that you have defined:
Scheduling BI Publisher Reports

Scheduling is a very important feature for any reporting system, which enables you to schedule long-running reports, to be run at a specified time and date. This enables you to select a time and date at which the load on the system is low, to run your daily/weekly and/or monthly reports. In this topic, you configure the BI Publisher scheduler to schedule the reports and view the report history and saved output.

- Configuring the BI Publisher Scheduler
- Scheduling and Viewing Saved Output

Configuring the BI Publisher Scheduler
1. Log in (if not logged in) to BI Publisher (Web) as Administrator (password Administrator). Click Admin to go to the Admin tabbed page.

Note: You can log in to BI Publisher by entering the URL (in the following format) in the browser:
http://<host>:9704/xmlpserver/

2. On the Admin tabbed page, click the Scheduler Configuration link in the System Maintenance section.
3. On the **Scheduler Configuration** page:

- Select **Oracle 10g** from the Database Type drop-down list.
- Enter **Connection String** in the format: `jdbc:oracle:thin:@<Host name>:<Port>:<SID>` for example, a sample connection string may look like: `jdbc:oracle:thin:@myhost:1521:orcl`.
- Enter bipsched as the **Username** and **Password** (this is the scheduler user that you must have created as per step 4 of the prerequisites).
- Ensure that `oracle.jdbc.driver.OracleDriver` is selected as **Database Driver Class**.
- Click **Test Connection**.
This should display the following message indicating that the connection was successful:

Confirmation

Connection established successfully.

Database Connection

Database Type: Oracle 10g
Connection String: jdbc:oracle:thin:@pmitravi-lap:1521:orcl
Username: bipsched
Password: ********
Database Driver Class: oracle.jdbc.driver.OracleDriver

Test Connection  Install Schema
4. Click **Install Schema** to install the required scheduler schema tables.

After the tables are installed in the database, the following message is displayed:

Restart BI Publisher Server or the OC4J service after this configuration.
In this topic, you schedule the Based on OracleDB report that you have created previously and view the saved output in the report history:

1. Login to BI Publisher (if not already logged in), and click **Reports** tab to go to the Reports tabbed page.

   ![BI Publisher Enterprise Interface](image1)

   Navigate to the **My Folders > Learn** folder. Click the **Schedule** link displayed below the report name for the Based on OracleDB report.

   ![Based on OracleDB Report](image2)

2. On the **Schedule Report** page that appears, select **Template3** from the **Template** drop-down list, and **PDF** as the **Format**.

   ![Schedule Report Page](image3)

   Enter **Based on OracleDB-Scheduled** as the **Job Name**, and select appropriate language and time options as per your requirements. Also, ensure that the **Save Data for Republish** and **Save**
Output options are selected. (Observe the screen below.)

3. In the Time section of the Schedule Report page, select the Run Daily/Weekly option. Select the check box beside Wed to run the report on every Wednesday, select the Run Time as 22.00 (to run the report at 10 p.m. in the night), and choose an appropriate Active Start Date and Active End Date. Click Submit.

This displays a message indicating the scheduling job is created successfully.

Also, note that the scheduled job is now displayed on the Schedules tabbed page:
You can also see that, the job is run at the scheduled time:

Note: You can deliver the scheduled report to destinations such as Email, FTP Server, and so on. Configuring delivery destinations is out of scope of this tutorial.
4. Click the **History** tab to view the report history. Note that the **Data XML** and **Document** columns are shown in the history table.

Click the icon in the **Document** column to see the saved report.

This displays the report generated when the schedule was executed, using the template and format that you selected.
Note: If you want to see the data of the scheduled report in XML form, you can click Data XML. If you want to republish, that is take the data from the scheduled job and generate a new document using the same template (or a different one) you can select Republish option.

5. You can view the job information by clicking the job name.
You can also manage the jobs as well as the job histories in BI Publisher. For example, to delete the job history for a specific job, select the job, and then click Delete.

Similarly, you can suspend, resume or delete a scheduled job from the Schedules tabbed page.
Creating BI Publisher Reports Based on Various Data Sources

Previously, you have created reports based on Oracle Database. BI Publisher also supports various types of data sources such as Web Services, HTTP/RSS, and Files. Because BI Publisher is integrated with Oracle Business Intelligence, you can also create reports based on the Oracle BI Answers request and Oracle BI Server subject area.

The following topics guide you to create reports based on these various types of data sets:

- Creating a Report Based on Oracle BI Answers Request
- Creating a Report Based on Oracle BI Server Subject Area
- Creating a Report Based on Web Services
- Creating a Report Based on HTTP/RSS Data set
- Creating a Report Based on File Data Set

Creating a Report Based on Oracle BI Answers Request

The steps for creating a report based on BI Answers request are briefly discussed here. For more details, refer to the topic "Creating a BI Publisher Report Based on Oracle BI Answers Request and Viewing Data" in the OBE titled "Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2."

You can create a BI Publisher report from a new answers request or an existing one. A brief list of steps is provided here for your reference:

1. Start the MS Word application, and log in to Oracle BI Publisher as Administrator.
Note: The Oracle BI Publisher menu and the BI Publisher toolbar with the Data, Insert, Preview, Tools, and Help menu is displayed in MS Word only when you have successfully installed the Oracle BI Publisher Desktop as mentioned in step 6 of the Prerequisites section.
2. In MS Word, open the Answers request based on which you want to create the BI Publisher report:

In the **Open Template** window, ensure that **Oracle BI** is selected from the **Workspace** drop-down list.

Navigate to the folder where you have saved the BI Answers request, and double-click the BI Answers request.
3. This displays the **Save As Oracle BI Publisher Report** window. Navigate to the folder in which you want to save the report, and click **Save**.

Here the report is saved in the **My Folders>Learn** folder in BI Publisher.

**Note:** You can also create a BI Publisher report based on the BI Answers request by logging in
to BI Publisher (Web UI), and selecting the Data Set type for the report as Oracle BI Answers.

4. You can create an **RTF** template for the report by inserting the table and charts (Insert > Table Wizard, Insert > Chart menu options from the BI Publisher toolbar) as per your report design requirements, using the Table and Chart Wizards provided in MS Word for BI Publisher.

![Table and Chart Wizards in BI Publisher](image1)

**Note:** Creating template files with charts and table is discussed in detail later in this tutorial.

5. Publish the RTF file as template for the BI Publisher report.
You can also preview how the report looks like:

The sample report and the template from the OBE titled "Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2" is shown here:
You can also view the report in BI Publisher (Web) using the templates by logging in as Administrator.

Creating a Report Based on Oracle BI Server Subject Area

The steps for creating a report based on BI Server subject area are briefly discussed here. For more details, refer to the topic "Creating a BI Publisher Report Based on Oracle BI Server Subject Area and Viewing Data" in the OBE titled "Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2."

A brief list of steps is provided here for your reference:

1. Log in (if not logged in) to **BI Publisher** (Web) as **Administrator** (password **Administrator**).
   **Note:** You can log in to BI Publisher by entering the URL (in the following format) in the browser:
   
   http://<host>:9704/xmlpserver/
Or, if you have installed and set up Oracle Business Intelligence Enterprise Edition, you can also log in to BI Publisher from the All Programs > Oracle Business Intelligence > BI Publisher option from the Start menu.

2. Navigate to the folder where you want to create the report, and click Create a new report.

Enter an appropriate name for the report, and click Create.
Here the report is created in the My Folders>Learn folder in BI Publisher.

3. Click Edit link displayed below the name of the report to edit the report properties. Click Data Model and click New to define the data source for this report.
4. On the Data Set page, ensure that SQL Query is selected from the Type drop-down list. Select Cache Result and ensure that Oracle BI EE is selected as the Data Source.
5. Click **Query Builder** to create a SQL Query. The **Query Builder** is opened displaying the **SH** subject area (metadata repository) objects displayed on the left. Drag the **Channels**, **Products**, and **Sales Facts** SH schema objects one by one to the **Model** canvas on the right.

Select the following columns to be displayed in the query from the **Model** objects (by selecting the check boxes beside the column names):
- Select **Channel Desc** from **Channels**.
- Select **Prod Category** and **Prod Name** from **Products**.
- Select **Amount Sold** from **Sales Facts**.

The screen looks like this after the column selection:
6. Click Save to save the query. Observe that the query is displayed in the SQL Query field of the Data Set page.
   Click the Save icon to save the report.
7. You can create an RTF template for the report from MS Word by logging in to BI Publisher. The PDF output of the report using the template created in the OBE titled "Integration of Oracle BI Publisher with Oracle Business Intelligence Enterprise Edition, 10.1.3.2" is shown here:

```sql
select Channels."Channel Desc" as "Channel Desc",
      Products."Prod Category" as "Prod Category",
      Products."Prod Name" as "Prod Name",
      "Sales Facts"."Amount Sold" as "Amount Sold"
from SH."Sales Facts" "Sales Facts",
     SH.Products Products,
     SH.Channels Channels
```
Creating a Report Based on Web Services

Web services are open standard–based (such as WSDL and SOAP) Web applications that interact with other Web applications for the purpose of exchanging data. Web services help quickly integrate applications across multiple platforms, systems and even across businesses in an easier, and cheaper way than ever before. Some of the Web services standards are SOAP, WSDL and UDDI, which enable system-to-system communication that is platform independent. Some of the popular Web services implementations are the ones to exchange information about stock quotes, currency converters, global weather, and so on.

Note: To avoid any firewall problems with the reports based on Web Services and RSS feeds, ensure that you have done the proxy settings as mentioned in step 6 of the Prerequisites.

In this topic, you will create a BI Publisher report based on a Web service, which provides the stock quotes. You will also use a predefined RTF template (provided with this OBE) to view the data.
Perform the following steps:

1. Log in (if not logged in) to **BI Publisher** (Web) as **Administrator** (password **Administrator**).  
   **Note:** You can log in to BI Publisher by entering the URL (in the following format) in the browser:
   http://<host>:9704/xmlpserver/

2. Navigate to the folder where you have created the previous reports (**Learn** folder), and click **Create a new report**.
Enter **Based on Web Services** as the name for the report, and click **Create**.

The report is created in the **My Folders>Learn** folder in BI Publisher.

3. Click the **Edit** link below the name of the report. Select the **Data Model** node on the left, and click **New** to define a new data model for the report.

4. Click the **New Data Set1** created, this opens the **Data Set** page on the right. Select **Web Service** from the **Type** drop-down list.
5. Enter http://www.webservicex.net/stockquote.asmx?WSDL in the **WSDL URL** field, and **GetQuote** as the method name.
Click the **Save** icon to save the report.

![Data Set][1]

**Note:** WebserviceX.NET provides on-demand XML Web Services for Financial, Distribution, Retail, Health Care, Manufacturing, Telecom, Government, and Educational organizations or industries.

6. Click **Parameters** and click **New** to add a parameter for the stock symbol.
7. On the **Parameter** page that appears:

- Enter **Quote** as the **Identifier**
- Select **String** from the **Data Type** drop-down list
- Enter **orcl** as the **Default Value**, and **Text** as the **Parameter Type**
- Type **Enter Stock Symbol**: in the **Display Label** field.

Click the **Save** icon to save the report.

8. Click **New Data Set1** under the **Data Model** node.
   The **Data Set** page appears on the right.
   Ensure that **Quote** is selected in the **Parameters** drop-down list.
9. The **Data Set** page looks like the screen below:

Click **Save** to save the changes to the report.

View the XML data to see if the stock quotes for Oracle Corporation are being returned to the report.
You can also view the stock quotes for other corporations by entering appropriate stock symbols such as `msft` (Microsoft), `GE` (General Electric), and so on.

10. Open the `WebServices.rtf` (provided with this OBE) template file and save it on your local system with the same name.
Now open this file in MS Word.
The file looks like this:
11. Connect to Oracle BI Publisher as Administrator in MS Word.
12. This opens the **Open Template** window.
   Navigate to **My Folders > Learn**.
   Select **Based on Web Services** report and click **Open Report**.
13. Select the **BI Publisher > Preview Template > PDF** option from the menu to preview the data in the report using this template.
14. Select the **BI publisher** > **Publish Template As** option to publish the template for this report. Enter **Template1** (or any other appropriate name) as the template name, and click **OK**.

Click **OK** again when the following message is displayed.
Creating a Report Based on HTTP/RSS Data Set

You can create a BI Publisher report based on RSS feeds available on the Web. You can do this by selecting HTTP as the Data Set type in BI Publisher when creating the report.

About RSS Feeds: As defined by Wikipedia, RSS (acronymic for Really Simple Syndication) is "a group of XML based web-content distribution and republication (Web syndication) formats primarily used by news sites and web-logs (popularly known as blogs)." Essentially, an RSS feed is a hosted XML file from which your RSS newsreader pulls headlines, URLs, and other content as it is updated. Users of RSS content use software programs called "feed readers" or "feed aggregators." The user subscribes to a feed by entering a link to the feed into the reader program. The reader can then check the user's subscribed feeds to see if any of those feeds have new content since the last time it was checked, and if so, retrieve that content and present it to the user.

In this topic, a simple site with RSS feed links (The New York Times) is used to show how the data is rendered to a BI Publisher report. (However, note that the RSS readers or aggregators are not discussed here, as they are out of the scope for this tutorial.)

1. Log in (if not logged in) to BI Publisher (Web) as Administrator (password Administrator).
   Note: You can log in to BI Publisher by entering the URL (in the following format) in browser:
   http://<host>:9704/xmlpserver/
2. Navigate to **My Folders** > **Learn**, and click **Create a new report**.

Enter **Based on HTTP-RSS** as the name of the report, and click **Create**.
3. Click the **Edit** link below the name of the report. Select **Data Model** node on the left and click **New** to define a new data model for the report.

4. Click the **New Data Set1** created. The **Data Set** page is displayed on the right. Enter **News** in the **Name** field, and select **HTTP (XML Feed)** from the **Type** drop-down list.
5. Enter http://www.nytimes.com/services/xml/rss/nyt/Business.xml as the URL, select GET from the Method drop-down list, and select the Cache Results option. (Observe the screen below.) Click Save to save the report.

You can view the XML data to check whether this news site is rendering valid data to the report.
6. Open the [HTTP-RSS.rtf](#) template file (provided with this OBE) and save it with the same name in your local system.
Now open this file in MS Word.
The file looks like this:

```xml
<?xml version="1.0" encoding="UTF-8" ?>
<rss version="2.0">
  <channel>
    <title>NYT > Business</title>
    <description />
    <language>en-us</language>
    <copyright>Copyright 2007 The New York Times Company</copyright>
    <lastBuildDate>Wed, 2 May 2007 08:05:01 EDT</lastBuildDate>
  </channel>
</rss>
```
7. (If not connected) Connect to Oracle BI Publisher as **Administrator** in MS Word.
8. This opens the **Open Template** window. Navigate to **My Folders > Learn**. Select **Based on HTTP-RSS** report and click **Open Report**.

9. Select the **BI Publisher > Preview Template > PDF** option from the menu to preview the data in the report using this template.
10. Select the **BI publisher** > **Publish Template As** option to publish the template for this report. Enter **Template1** (or any other appropriate name) as the template name, and click **OK**.

### Example For RSS Feeds: The New York Times

<table>
<thead>
<tr>
<th>Title</th>
<th>Link</th>
<th>Author</th>
<th>Pubdate</th>
</tr>
</thead>
</table>
Click **OK** again when the following message is displayed.

If you have time, try creating the reports using the RSS feeds available on the Oracle Web site at : http://www.oracle.com/rss/index.html, or those available on Yahoo at: http://news.yahoo.com/rss.

**Creating a Report Based on File Data Set**

In this topic, you create a report based on File data set. You will use the XML demo files provided along with the BI Publisher.

**Note:** The demo files are generally found in the `<Oracle Home>/xmlp/XMLP/DemoFiles` directory. Check with your administrator for the exact path.

To create a BI Publisher report from a File data set, perform the following steps: (Here you will be using a purchase order data set from the demo files, and also upload a predefined template for the report.)

1. Navigate to **My Folders> Learn**, and click **Create a New Report**.
   Enter **Based on File** as the name of the report and click **Create**.
2. The report is displayed in Learn folder in BI Publisher. Click the **Edit** link under the name of the report to open the report in Edit mode.
3. Click **Data Model** (found on the left of the **Report Properties** page) and click **New** to define the data source for this report.

4. In the **Data Set** screen that appears:
   - Select **File** from the **Type** drop-down list
   - Ensure that **demo files** is selected as the **Data Source**
   - And enter **PODataSample.xml** as the file name
   - Click **Save** to save the report
5. Click View to go to the View mode of the report. Click View again to view the XML data. (A portion of the sample purchase order XML data is shown here.)
Note: As you have not associated the report with any template, you can see only XML data. However, in the next step, you will define a layout for the report and associate it with a predefined template. A set of predefined templates are also shipped along with the demo XML files in BI Publisher. (These templates are generally found in `<Oracle Home>/xmlp/XMLP/Reports` which has many folders with various RTF templates.)

6. In View mode of the report, click the Edit link (found at the top-right corner of the page) to go back to edit mode of the report. Click Layouts in the Report pane on the left. This displays the Create Layouts section on the right. Click Browse in the Manage Template Files section to browse and upload a predefined RTF template.
Navigate to the `<Oracle Home>/ xmlp/XMLP/Reports> Supply Chain management>Purchase Order` folder.
Select the `POTemplateSample.rtf` file and click `Open`.

(If you are not able to locate this file, check with your administrator to locate the demo files and
the templates shipped with BI Publisher, which has many folders with various RTF templates).

**Note:** You can publish a template from MS Word. Previously you have published the templates from MS Word, so in this topic, uploading a predefined template from BI Publisher (Web) is shown.

7. Click **Upload** to upload this RTF template for the report. Click **Save** to save the layout changes to the report.

8. Click **Layouts** again, and click **New** to create a new report Layout to associate it with the template uploaded.
9. In the **Layout** section, that is displayed on the right make sure that **POTemplateSample.rtf** is selected from the **Template** drop-down list and **All formats** is selected as the **Output Format**. Click **Save** again to save the report layout.

10. Click **View** to open the report in View mode. Select the template that you have uploaded from the **Template** drop-down list, select **pdf** as the data format from the drop-down list, and click **View** to view the report.
Scroll down and see the report.
Summary

In this tutorial, you learned how to:

- Create a BI Publisher report based on Oracle Database
- Create an RTF template with a table and chart using BI Publisher desktop in MS Word
- Publish the template for a report
- Modify the template using the native features of MS Word
- Create and publish multiple templates for a BI Publisher report
- View data in BI Publisher reports using the templates in various formats supported
- Create a report with parameters and list of values
- Schedule and manage the BI Publisher reports

Note: You can also try and create BI Publisher reports based on the other demo files such as Marketing.xml, Balance.xml, PriceList.xml, or any other XML data file that you have. (All the demo files have been provided with predefined templates.)
View the saved output in scheduled report history
Create a BI Publisher reports based on other data sources, such as Oracle BI EE, HTTP, Web Services, and File data sets

Related Information

To learn more about Oracle Business Intelligence, you can refer to:

- Additional OBEs on BI Publisher.
- Additional OBEs on BI on the OTN Web site.