Business Intelligence Publisher

Quick Start Guide

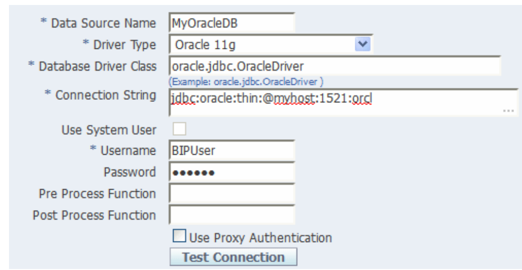
Oracle BI Publisher is a reporting solution to author, manage, and deliver all your reports and documents easier and faster than traditional reporting tools.

Administering BI Publisher

Create Data Sources

To create a connection to an Oracle Database:

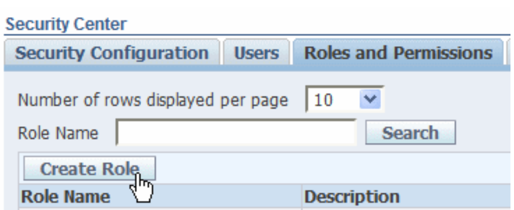
1. Click the **Administration** link.
2. Click **JDBC Connection** and then click **Add Data Source**.
3. Enter a **Name** for the data source; then select the database type (Oracle 11g).
4. Enter the **Connection String** in the format shown, and the Username and Password.
5. Click **Test Connection**. Click **Apply**.



Report Developers can use this data source when creating data models.

Create Roles

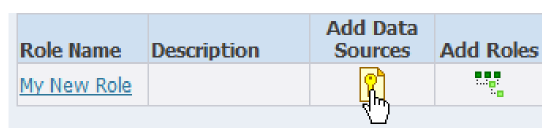
Note: These steps apply when using BI Publisher security. If you have integrated BI Publisher with another security option such as Fusion Middleware Security, see the appropriate documentation for your implementation.

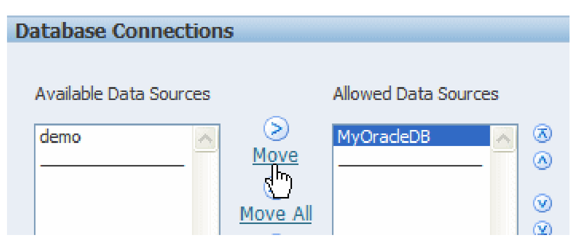


1. Click the **Administration** link.
2. Under **Security Center**, click **Roles and Permissions**.
3. Click **Create Role**.
4. Enter a **Name** for the role and optionally a **Description**.
5. Click **Apply**.

Manage Roles

1. Add data sources to the role:
   a. Click **Add Data Sources**.
   b. For each data source type, move the data sources that are required for this role from **Available** to **Allowed**.
   c. Click **Apply**.
2. Add roles to this role if using BI Publisher security:
   a. Click **Add Roles**.
   b. Move the required roles for this role from **Available** to **Allowed**.
3. Click **Apply**.



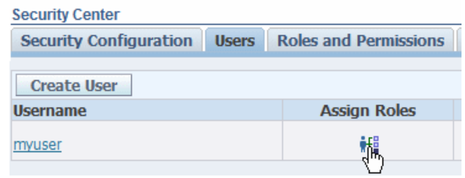


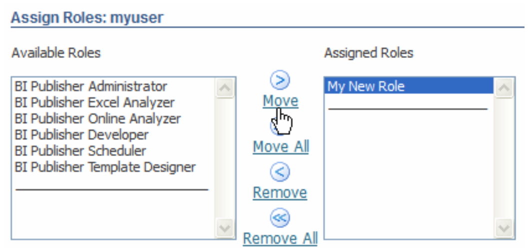
Note: Add Roles is available only when using BI Publisher security. The seeded BI Publisher roles enable functional privileges such as Designing Templates and Scheduling Reports.

Create Users

Note: If you have integrated BI Publisher with another security option such as Fusion Middleware Security, see the appropriate documentation for your implementation.

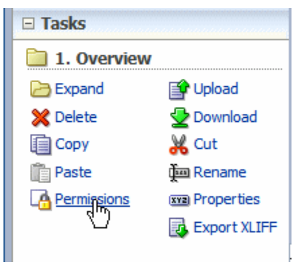
1. Click the **Administration** link.
2. Under **Security Center**, click **Users**.
    a. Click **Create User**.
    b. Enter a **Username** and **Password**.
    c. Click **Apply**.
3. Click **Assign Roles**.
4. To grant this user privileges, move **Available Roles** to **Assigned Roles**.

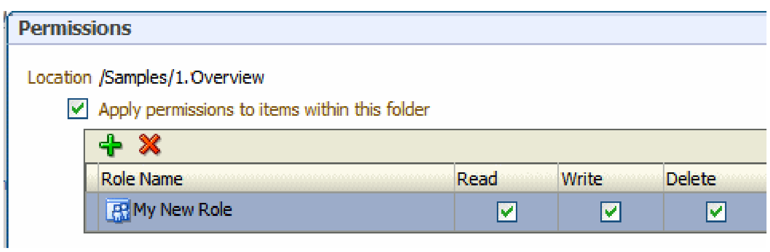




Grant Catalog Permissions to a Role

A role must be granted access to folders and objects in the catalog to perform actions on those objects.



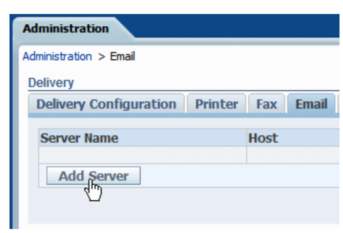


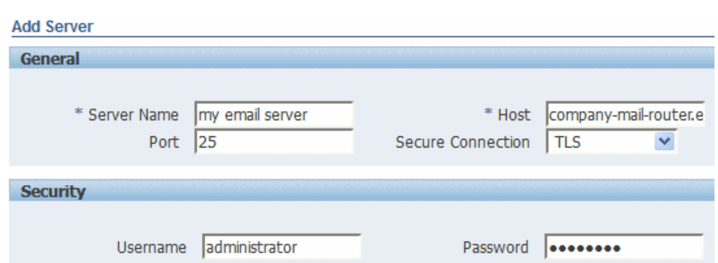
1. Select the folder or object in the catalog.
2. In the **Tasks** pane, click **Permissions.**
3. Click ✚ to add role permissions to this object.
4. In the **Add Roles** dialog, enter the role name or partial role name and click Search.
5. Move the desired role to the **Selected Roles** list. Click **OK**.
6. Select the permissions to grant this role on this object, such as **Read**, **Write**, and **Delete**.
7. (Optional) For folders, select **Apply permissions to items within this folder**.

Create Delivery Destinations

To add an email server as a delivery destination:

1. Click the **Administration** link.
2. Under **Delivery** click **Email**.
3. Click **Add Server**.
4. Enter the details for your email server:
    - Enter a **Server Name** that is unique.
    - Enter the email server **Host** (for example: mail.example.com) and **Port**.
    - Optionally select the type of **Secure Connection** to use.
    - Optionally enter the **Username** and **Password** for the server.
5. Click **Apply**.





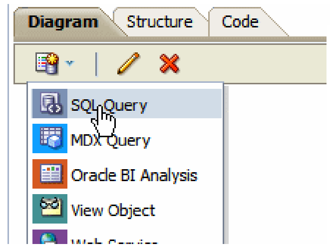
Report Viewers can now use this **Destination Type** for BI Publisher scheduled jobs.

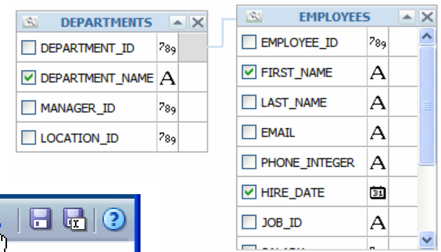
Creating Data Models and Reports

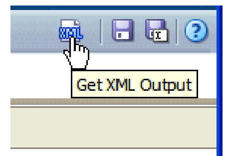
Create Data Model

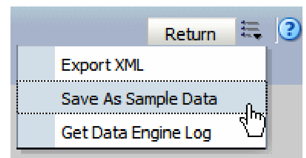
To create a data model based on a SQL data set:

1. From the **New** menu, select **Data Model**.
2. Select the **Default Data Source**.
3. Click **Data Sets**.
4. From the **New Data Set** menu, select **SQL Query**.
5. Enter a **Name** for the data set and click **Query Builder**.
6. Select the tables then columns to include, and optionally create joins and add conditions.
7. Optionally add **Parameters** and associate each with a **List of Values**.
8. Click the **Structure** tab to edit the **Display Names** of data elements.
9. Click **Get XML Output** to generate sample data. Select **Save As Sample Data**. Click **Return**.
10. Save your data model.



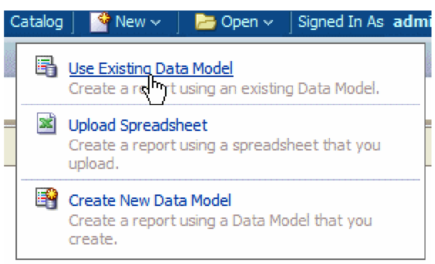


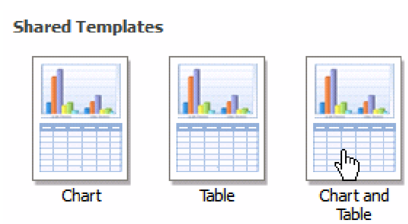


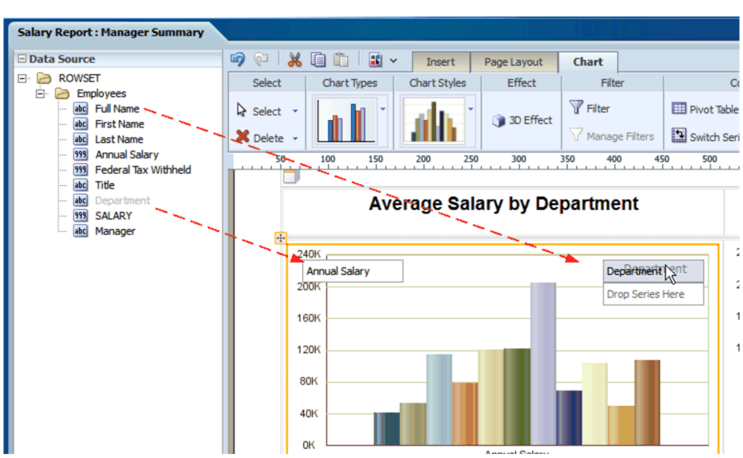


Report Authors can now use this data model when creating reports.

Create Report and Layout





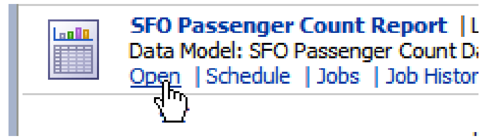


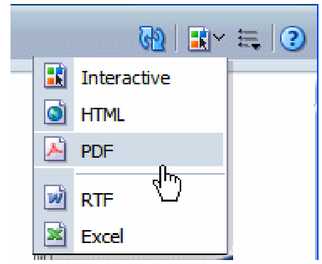
To create a new report and layout using the Layout Editor:

1. From the **New** menu, select **Report**, then **Use Existing Data Model**.
2. Choose your data model and click **Next**.
3. Select **Use Report Editor** and click **Finish**. Save the report.
4. Select a template to launch the Layout Editor.
5. **Insert** components (e.g. data tables, charts, lists, etc.) and populate with **Data Source** elements to create the desired layout.
6. Use the ribbon toolbar or the **Properties** pane to control the look and feel of layout components.
7. Optionally preview in different formats as you build the layout.
8. Save your layout.
9. Click **Return**.
10. Optionally customize **Parameters**, **Properties**, and **Layout Properties**.

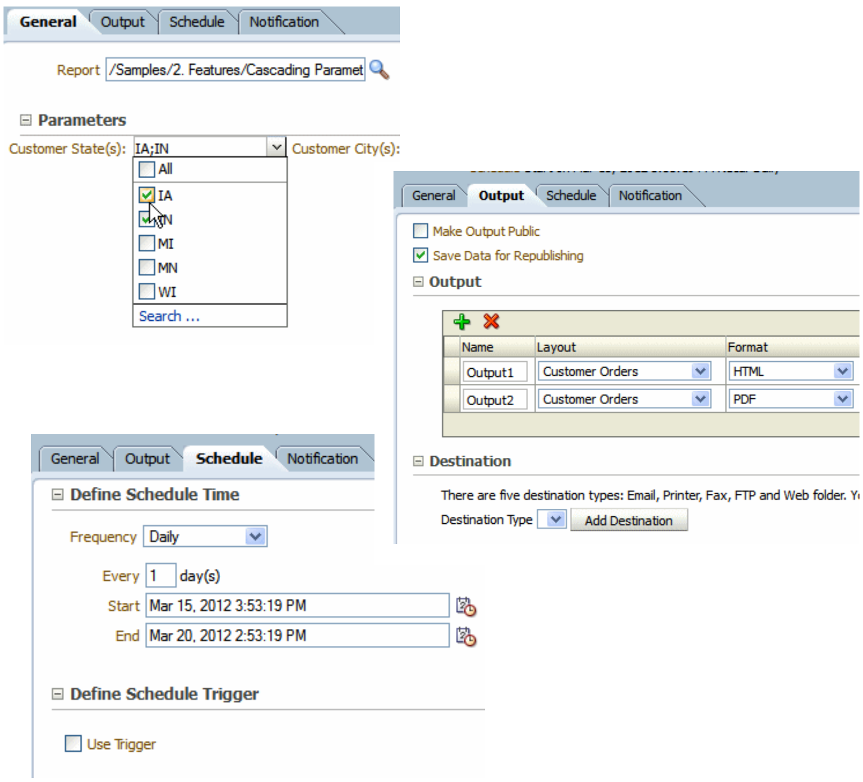
View a Report

1. From the **Home** page, click **Catalog**.
2. Navigate the catalog folders to locate your report.
3. Click **Open**. The report displays the default layout and format.
4. Click other tabs to view other layouts of the same data.
5. To view other output types, click **View Report** and select the format type from the list.





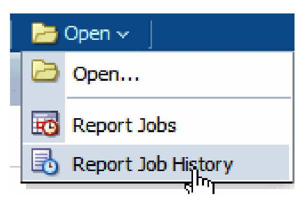
Schedule a Report Job

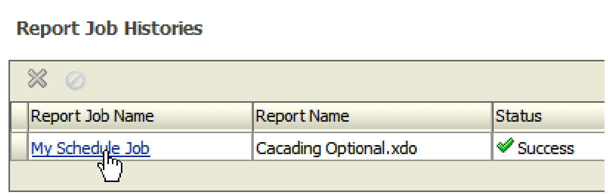


1. From the **New** menu, select **Report Job**.
2. Click to select the report to schedule.
3. For reports that include parameters, select the values for this report job.
4. Click **Output**.
5. Select the layout and format for the output. Click to add more output files to this job. Select the layout and format for each output.
6. Click **Add Destination**. Define the destination (for example, email or printer) for each output file.
7. Click **Schedule**.
8. Define the **Frequency** (Once, Daily, Weekly, etc.) for this job.
9. Click **Submit**.
10. Enter a Name for this **Report Job**.
11. Click **OK**.

View Report Job Output

1. From the **Open** menu, select **Report Job History**.
2. By default, all the report jobs submitted by your user for the past week are displayed.
3. (Optional) Use the filter criteria to search for the report job.
4. Click the **Report Job Name** to view the job information.
5. Click the **Output Name** to view the completed report.





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