

Oracle® Fusion Middleware

Installation Notes for Oracle Business Intelligence Publisher Trial Edition

11g Release 1 (11.1.1)

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Welcome to *Installation Notes for Oracle Business Intelligence Publisher Trial Edition*. This guide covers the following topics:

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1 Introduction

Oracle BI Publisher Trial Edition 11.1.1.7.1 is a fully functional, free trial provided for evaluation purposes. It is not intended for production deployments. See the Oracle Technology Network Developer License Terms for details:

<http://www.oracle.com/technetwork/licenses/standard-license-152015.html>

1.1 Supported Functionality and Intended Use

The BI Publisher Trial Edition enables you to explore the features of Oracle BI Publisher. Using the provided sample data or your own data connections you can:

- Run the provided sample reports to explore BI Publisher features
- Connect to your own data sources and create data models
- Design layouts on top of your own data sources using BI Publisher's layout editor or any of the other supported layout types
- Connect to your delivery servers

- Schedule reports for immediate or future viewing and deliver them to your configured destinations
- Provide translations of your own layouts

1.2 Limitations

The BI Publisher Trial Edition does not support some functionality that the BI Publisher 11g production version supports. This includes:

- The trial edition does not support BI Analyses as a data source.
- The trial edition does not support Endeca as a data source.

2 Requirements and Supported Components

This section describes the system requirements and supported components for the BI Publisher Trial Edition including:

- [System and Software Requirements](#)
- [Desktop Tools Requirements](#)
- [Supported Data Sources](#)

2.1 System and Software Requirements

[Table 1](#) provides the system and software requirements for Oracle BI Publisher Trial Edition.

Table 1 BI Publisher Trial Edition System Requirements

Requirement	Supported Versions
Operating system	<p>One of the following Microsoft Windows operating systems: (32-bit or 64-bit)</p> <ul style="list-style-type: none"> ■ Windows 2003 with SP2/R2+ ■ Windows 7 (all SP levels included) ■ Windows Server 2008 with SP1+, SP2+ ■ Windows Server 2008 R2 (all SP levels included) <p>One of the following Linux operating systems (32-bit or 64-bit):</p> <ul style="list-style-type: none"> ■ Oracle Linux 4 Update 7+ ■ Oracle Linux 5 Update 3+ ■ Red Hat Enterprise Linux 4 Update 7+ ■ Red Hat Enterprise Linux 5 Update 3+ ■ SLES 10 (SP1 +) ■ SLES 11
Disk space	2.4 GB
RAM	1 GB free beyond OS requirements

Table 1 (Cont.) BI Publisher Trial Edition System Requirements

Requirement	Supported Versions
Client browser	One of the following browsers: <ul style="list-style-type: none"> ■ Internet Explorer 7.x, 8.x, 9.x ■ Firefox 3.5+, 6+ ■ Safari 4.x, 5.x ■ Chrome 12+
Java	Java SE Runtime Environment (JRE) 6 Java SE JRE version 1.6 Update 43 is included in the Windows installation. Linux users must have Java installed on their system before installing BI Publisher Trial Edition. To get Java go to: http://www.oracle.com/technetwork/java/javase/downloads/index.html

2.2 Desktop Tools Requirements

Table 2 provides the system and software requirements for the desktop tools. The desktop tools are optional.

Table 2 BI Publisher Trial Edition Desktop Tools Requirements

Requirement	Value
Client operating system for desktop tools	Supported operating systems for Windows 32-bit: <ul style="list-style-type: none"> ■ Windows XP Professional with SP3+ ■ Windows Vista with SP1+ ■ Windows 7 Supported operating systems for Windows 64-bit: <ul style="list-style-type: none"> ■ Windows Vista with SP1+ ■ Windows 7
Microsoft Office	<ul style="list-style-type: none"> ■ Microsoft Office 2007 SP3+ ■ Microsoft Office 2010 SP1+

2.3 Supported Data Sources

Table 3 provides the data sources that are supported for use with the BI Publisher Trial Edition.

Table 3 BI Publisher Trial Edition Supported Data Sources

Data Source Type	Value
Databases	The following databases are supported: <ul style="list-style-type: none">■ Oracle 10.2.0.4+, Oracle 11.1.0.7+, Oracle 11.2.0.1+■ IBM DB2 9.1, 9.5, 9.7 and later FixPaks■ Microsoft SQL Server 2005, 2008, 2008 R2■ Microsoft SSAS 2005, 2008■ Teradata 12, 13.0, and 13.10■ IBM Informix Dynamic Server (IDS) 11.5+■ Sybase Adaptive Server Enterprise (ASE) 15.0.x■ Netezza NPS 6.0
OLAP Databases	The following OLAP data sources are supported: <ul style="list-style-type: none">■ Oracle OLAP 10.2, 11.1, 11.2■ Oracle Essbase 9.3.3+, 11.1.1.3.500, 11.1.1.4, 11.1.2+■ SAP BW 7.x SP 17+

3 What Is Included in the Trial Edition

The following components are installed with the BI Publisher Trial Edition:

- Java SE JRE version 1.6 Update 43 (Windows only)
- Java DB 10.6.1.0 (Java DB is the Oracle release of the Apache Derby project)
Included on the database are:
 - The scheduler schema to hold your scheduled job information and history
 - BIPDemo schema that includes seed data to run the sample reports and for you to create your own trial reports
- Oracle WebLogic Server 11gR1 (10.3.6)
Included exclusively to run the BI Publisher Trial Edition. The WebLogic Server distribution is not intended for production or test deployments.
- Oracle BI Publisher 11.1.1.7.1 server and repository including sample reports

4 Installing BI Publisher Trial Edition

The BI Publisher Trial Edition can be installed on either Windows or Linux.

- [Installing BI Publisher Trial Edition for Windows](#)
- [Installing BI Publisher Trial Edition for Linux](#)

4.1 Installing BI Publisher Trial Edition for Windows

To install the BI Publisher Trial Edition on Windows:

1. Log on to Windows with Administrative privileges.
2. Go to the following website:

<http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>

3. Click the **BI Publisher Trial Edition 11g for Windows 32-bit or 64-bit** link, as appropriate for your system. This begins the download of the BI Publisher Trial Edition executable.
4. When the download completes, run or double-click the BI Publisher Trial Edition executable. This opens the Installer Wizard. In the **Welcome** window, click **Next**.
5. Select the location to install the BI Publisher Trial Edition directory. A default location is provided; you can edit the default, or accept it by clicking **Next**.
6. Enter the **Username** and **Password** to be used for the BI Publisher Trial Edition Administrator user and the Oracle WebLogic Server Administrator user. The password must be at least 8 characters and contain at least one number and one alpha character. Use this username and password when you log in to BI Publisher or WebLogic Server. Retype the password to confirm and then click **Next**.
7. In the final dialog, click **Install** to begin the installation.
8. When the install phase completes, a final dialog prompts you to perform the configuration and initial start up of the servers. Click **Finish** to finalize configuration.

During this phase, an Oracle WebLogic Server command window launches to start the BI Publisher Trial Edition. This window must remain open to use BI Publisher.

9. When the BI Publisher Trial Edition **Welcome** page launches, click **Sign In to BI Publisher**. Use the credentials:
 - **Username:** the username you specified during install
 - **Password:** the password you specified during install

The installation process starts the BI Publisher Trial Edition servers for you. The next time you need to start BI Publisher, follow the instructions in [Section 5.1, "Starting and Stopping BI Publisher Trial Edition on Windows"](#) to start and stop the application.

4.2 Installing BI Publisher Trial Edition for Linux

This section includes the following topics:

- [Prerequisites](#)
- [Steps for Installing on Linux](#)

4.2.1 Prerequisites

To install BI Publisher Trial Edition on Linux you must have Java installed and set the JAVA_HOME variable to a valid Java home (JDK or JRE Home) directory.

4.2.2 Steps for Installing on Linux

To install BI Publisher Trial Edition on Linux:

1. Go to the following website:

<http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>

2. Click the **BI Publisher Trial Edition 11g for Linux 32 and 64 bit** link (supports both 32-bit and 64-bit). This begins the download of the BIPublisherTrialEdition.zip file.

3. When download completes, unzip the BIPublisherTrialEdition.zip file. All files are extracted under BI_Publisher_Trial.
4. Change your working directory to BI_Publisher_Trial.
5. Run configureBIP.sh.
6. At the prompt, enter the **Username** and **Password** to be used for the BI Publisher Trial Edition Administrator user and the Oracle WebLogic Server Administrator user. The password must be at least 8 characters and contain at least one number and one alpha character. Use this username and password when you log in to BI Publisher or WebLogic Server. At the second prompt, retype the password to confirm.

When installation and configuration phases complete, a command window launches as BI Publisher Trial Edition starts up. You can sign in to BI Publisher Trial Edition when you see the following line in the command window:

```
< [today's date and time]> <Notice> <WebLogicServer> <BEA-000360>
<Server started in RUNNING mode>
```

7. To sign in to BI Publisher Trial Edition, open the welcome.html file in a browser. The welcome.html file is located as follows:

```
BI_Publisher_Trial/doc/welcome.html
```

The installation process starts the BI Publisher Trial Edition servers for you. The next time you need to start BI Publisher, follow the instructions in [Section 5.2, "Starting and Stopping BI Publisher Trial Edition on Linux"](#) to start and stop the application.

5 Starting and Stopping BI Publisher Trial Edition

Use these procedures to start and stop the BI Publisher Trial Edition:

- [Starting and Stopping BI Publisher Trial Edition on Windows](#)
- [Starting and Stopping BI Publisher Trial Edition on Linux](#)

5.1 Starting and Stopping BI Publisher Trial Edition on Windows

Use these procedures after initial installation to start and stop BI Publisher Trial Edition on Windows.

5.1.1 Starting BI Publisher Trial Edition

To start BI Publisher Trial Edition on Windows:

1. On the Windows **Start** menu, on the **Programs** menu, navigate to **Oracle BI Publisher Trial Edition** and then select **Start BI Publisher**.

A command window launches for Oracle WebLogic Server. When the Weblogic Server window displays the following line you can sign in to BI Publisher:

```
< [today's date and time]> <Notice> <WebLogicServer> <BEA-000360>
<Server started in RUNNING mode>
```

2. To sign in to BI Publisher, on the Windows **Start** menu, on the **Programs** menu, navigate to **Oracle BI Publisher Trial Edition** and then select **Sign In to BI Publisher**. This launches the Welcome page in a browser.
3. On the **Welcome** page, click **Sign In to BI Publisher**.

5.1.2 Stopping BI Publisher Trial Edition

To stop BI Publisher Trial Edition on Windows:

- On the Windows **Start** menu, on the **Programs** menu, navigate to **Oracle BI Publisher Trial Edition** and then select **Stop BI Publisher**.

5.2 Starting and Stopping BI Publisher Trial Edition on Linux

Use these procedures after initial installation to start and stop BI Publisher Trial Edition on Linux.

5.2.1 Starting BI Publisher Trial Edition

To start BI Publisher Trial Edition on Linux:

1. Change your working directory to `BI_Publisher_Trial/bin`.
2. Run `startBIP.sh`.

The start script launches a command window. You can sign in to BI Publisher Trial Edition when you see the following line in the command window:

```
< [today's date and time]> <Notice> <WebLogicServer> <BEA-000360>  
<Server started in RUNNING mode>
```

3. To sign in to BI Publisher Trial Edition, open the `welcome.html` file in a browser. The `welcome.html` file is located as follows:

```
BI_Publisher_Trial/doc/welcome.html
```

5.2.2 Stopping BI Publisher Trial Edition

To stop BI Publisher Trial Edition on Linux:

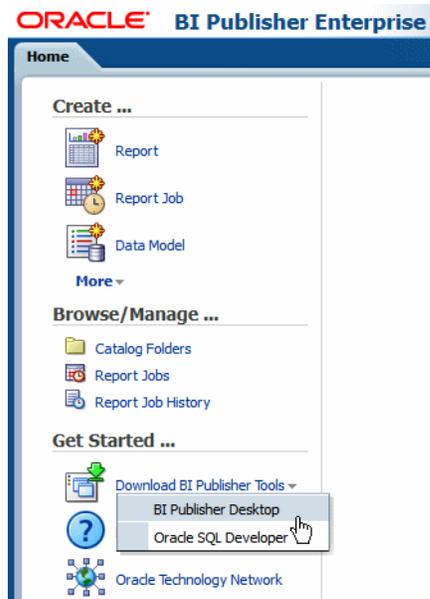
1. Change your working directory to `BI_Publisher_Trial/bin`.
2. Run `stopBIP.sh`.

6 Installing the BI Publisher Desktop Tools

BI Publisher provides a set of desktop tools to facilitate the design of layouts in Microsoft Word and Microsoft Excel. Install these tools if you plan to create BI Publisher rich text format (RTF) layouts or Excel layouts. The Template Builder for Microsoft Word is an add-in that enables you to insert report components (such as tables, charts, and repeating groups) to your Word document and to map elements from your data to these report components. The Template Builder for Excel is an add-in for Microsoft Excel that enables the preview of Excel Templates. The desktop tools also include the Template Viewer that enables the preview of RTF, PDF, Excel, and XSL template types.

To install the BI Publisher Desktop Tools:

1. Sign in to the BI Publisher Trial Edition.
2. On the BI Publisher Home page, under **Getting Started**, click **Download BI Publisher Tools** and then select **BI Publisher Desktop**.



3. At the prompt, enter your credentials for the Oracle Technology Network.
4. On the Oracle BI Publisher Downloads page on OTN, read and accept the License Agreement.

Under **Oracle BI Publisher 11g Enterprise**, select the desktop version that is appropriate for your client:

- Oracle BI Publisher Desktop 11.1.1.7.0 for 32 bit Office on Windows
- Oracle BI Publisher Desktop 11.1.1.7.0 for 64 bit Office on Windows

At the prompt, click **Save File** and then select the download location for the **BIPublisherDesktop.exe** file.

5. When download completes, run BIPublisherDesktop.exe to install the desktop tools.

For information on using the tools, see the following:

- For more information about using the Template Builder for Microsoft Word see the Template Builder help, or the chapter "Creating RTF Templates Using the Template Builder for Word" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.
- For more information about using the Template Builder for Excel see the chapter "Creating Excel Templates" in *Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher*.

7 Getting Started

Included with the installation is *Getting Started with Oracle Business Intelligence Publisher Trial Edition*. This tutorial contains step-by-step instructions for creating your first BI Publisher report. The **Getting Started Tutorial** can be accessed from the BI Publisher Trial Edition Welcome page.

For Windows users, access the Welcome page from the Windows **Start** menu by selecting Programs, then Oracle BI Publisher Trial Edition, and then Sign In to BI Publisher. Click **Getting Started Tutorial**.

For Linux users, open `welcome.html` in a browser. The `welcome.html` file is located in `BI_Publisher_Trial/doc/welcome.html`. On the Welcome page, click **Getting Started Tutorial**.

Additional Resources

Once you get started, consult the following additional resources for more information.

Table 4 Oracle BI Publisher Resources

Resource	Use this resource to
Documentation	Find information on all aspects of using BI Publisher: <ul style="list-style-type: none">▪ To create reports and design layouts see: <i>Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher</i>▪ To create data models see: <i>Oracle Fusion Middleware Data Modeling Guide for Oracle Business Intelligence Publisher</i>▪ To view and schedule reports and manage scheduled report jobs see: <i>Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Publisher</i>▪ To configure data sources, delivery servers, and manage users, see: <i>Oracle Fusion Middleware Administrator's Guide for Oracle Business Intelligence Publisher</i>▪ To integrate BI Publisher with your own applications, see: <i>Oracle Fusion Middleware Developer's Guide for Oracle Business Intelligence Publisher</i>
Blog	Find out more about BI Publisher through numerous articles providing tips, tricks, and real-world use case procedures for using BI Publisher in your enterprise.
Forum	Submit questions and get answers from other BI Publisher users.
Demo Videos	Watch feature demonstrations on the Oracle BI Publisher channel on YouTube.

8 Buying BI Publisher

When you decide to buy BI Publisher, click **Buy Now** on the Welcome page to go to the Oracle Store and purchase a full-use license of BI Publisher. Or, talk to a sales representative by calling +1.800.ORACLE1 in the United States. For Sales Offices and phone numbers outside of the United States go to Global Contacts at

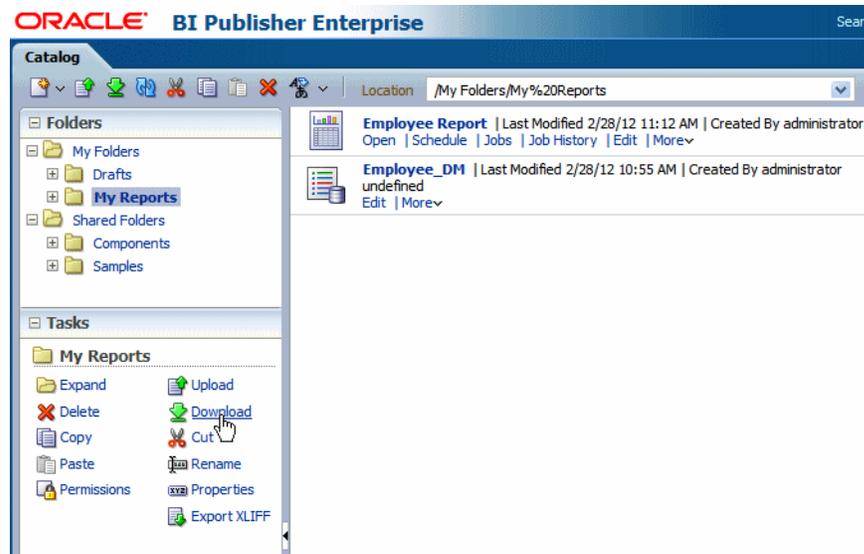
<http://www.oracle.com/us/corporate/contact/global-070511.html>

The Trial Edition license is not intended for production use. You must purchase a full-use license and install BI Publisher using the Oracle Business Intelligence 11g Installer to start using BI Publisher in a production environment.

9 Migrating Reports from the BI Publisher Trial Edition to a Production Environment

You can move reports and other content you created in the trial edition to a production environment. When you move content between environments, be aware of the following:

- You must create the data sources in the production environment using the same names used in the trial edition (for example, your JDBC connection names). This is because data models refer to the data source name. If you create the data sources in the production environment using different names, you can still use the migrated data models by opening each one and selecting the new data source name.
 - You must maintain the same relative directory structure for reports and their data models. This is because the reports refer to their data models based on the path. If you must change the structure, you can open each report and reselect the data model in its new location.
1. In the BI Publisher 11g production environment, create the data sources using the same names used in the BI Publisher Trial Edition.
 2. In the BI Publisher Trial Edition catalog, select the folder to move to the production environment.
 3. In the **Tasks** region, click **Download**.



The **Download Resource** function creates an archive file of the catalog folder and all its contents. The archive file is of the format .xdrz.

4. In the BI Publisher 11g production environment, select the catalog folder in which to upload the Trial Edition content.

Note: If you purchase and install the BI Suite Enterprise Edition, ensure that you use the BI Publisher Enterprise user interface to upload your trial edition reports. The URL for BI Publisher Enterprise is `http://<host>:<port>/xmlpserver/`

When you are logged in to BI Publisher Enterprise, the BI Publisher Enterprise logo displays in the upper left corner. You must use the BI Publisher interface to have access to the **Upload Resource** functionality to upload the reports you downloaded from your Trial Edition installation.

5. On the toolbar, select **Upload Resource**.
6. In the dialog, click **Browse** to locate the archive file you downloaded from the trial edition. Click **Upload**.

BI Publisher uploads and unarchives the folder and its contents in the location specified.

10 Uninstalling the BI Publisher Trial Edition

This section includes the following topics:

- [Uninstalling from Windows](#)
- [Uninstalling from Linux](#)

10.1 Uninstalling from Windows

The uninstall procedure does not remove the BI Publisher repository that contains the report objects in the catalog, connection settings to data sources and delivery servers, and user profile information. This is to ensure that you have this content available when you decide to move to the production version. During the removal process, the repository folder is renamed with a date-time stamp, for example: repository02142012-113310.

To uninstall Oracle BI Publisher Trial Edition from Windows:

1. Stop BI Publisher using the instructions here: [Section 5.1.2, "Stopping BI Publisher Trial Edition."](#)
2. In the Windows Control Panel, select **Add or Remove Programs**. Windows 7 users select **Programs and Features**.
3. Select Oracle BI Publisher Trial Edition.
4. Click **Remove**. Windows 7 users select **Uninstall**.
5. The InstallShield Wizard prompt displays: "Do you want to completely remove the selected application and all of its features?" Click **Yes**.
6. When the process completes, click **Finish**.
7. (Optional) Manually delete the BI Publisher repository folder. Navigate to the location where you installed the BI Publisher Trial Edition, for example: C:\Program Files\Oracle\BI Publisher\BI Publisher Trial Edition. Delete the repository folder.

10.2 Uninstalling from Linux

Oracle recommends that you do not remove the BI_Publisher_Trial/repository directory. This directory contains the report objects you created in the catalog, connection settings to data sources and delivery servers, and user profile information. This is to ensure that you will have this content available when you decide to move to the production version.

To uninstall the BI Publisher Trial Edition from Linux:

1. Stop BI Publisher using the instructions here: [Section 5.2.2, "Stopping BI Publisher Trial Edition."](#)
2. (Recommended) Save the BI_Publisher_Trial/repository directory to another location for future availability.
3. Remove the BI_Publisher_Trial directory.

11 Known Issues

Following are known issues with the BI Publisher Trial Edition:

- [Internet Explorer 8 Does Not Launch the Welcome Page](#)
- [Stop BI Publisher Command May Not Complete Successfully](#)
- [Reports Using HTTP Data Sources May Require Proxy Configuration](#)
- [Sample Report "Salary Report" Data Model Contains Error in Bursting Definitions](#)

Internet Explorer 8 Does Not Launch the Welcome Page

If you are using Internet Explorer 8, after the installation completes the Welcome page does not launch.

To work around this issue, use another supported browser (see [Table 1](#)); or launch the Welcome page from the Windows **Start** menu by selecting Start, then Oracle BI Publisher Trial Edition, and then Sign In to BI Publisher).

Stop BI Publisher Command May Not Complete Successfully

After executing the command to **Stop BI Publisher** (on Windows or Linux) to shut down the BI Publisher components, WebLogic Server may not close down successfully and continue to display error messages.

To work around this issue, manually close the Oracle WebLogic Server window.

Reports Using HTTP Data Sources May Require Proxy Configuration

When BI Publisher Trial Edition is set up behind a firewall, you must configure proxy settings to enable HTTP data sources to retrieve data from outside the firewall. The sample report Executive Sales Dashboard with News (located under Shared Folders/Samples/3. Applications/Executive uses HTTP data sources. To view this report when the Trial Edition is set up behind a firewall, configure the proxy settings as follows:

To configure the proxy settings for Windows:

1. In the location where you installed the Trial Edition, navigate to BI Publisher Trial Edition\bin.
2. Make a backup of `setBIPEnv.bat` file and then open it for editing.
3. Add the following to the end of the `set JAVA_OPTIONS` line:

```
-Dhttp.proxySet=true -Dhttp.proxyHost=www-proxy.example.com -Dhttp.proxyPort=80
```

where `www-proxy.example.com` is your proxy host and the value for the `proxyPort` number is your proxy host port.

4. Restart the BI Publisher Trial Edition.

To configure the proxy settings for Linux:

1. In the location where you installed the Trial Edition, navigate to BI Publisher Trial Edition/bin.
2. Make a backup of `setBIPEnv.sh` file and then open it for editing.
3. Add the following to the `BIP_JAVA_OPTIONS` line:

```
-Dhttp.proxyHost=www-proxy.example.com -Dhttp.proxyPort=80
```

where `www-proxy.example.com` is your proxy host and the value for the `proxyPort` number is your proxy host port.

4. Restart the BI Publisher Trial Edition.

Sample Report "Salary Report" Data Model Contains Error in Bursting Definitions

The bursting queries for the Salary Report sample report contain a syntax error. If you attempt to schedule the report and use the bursting functionality, the report fails. To correct the Bursting Queries:

1. Navigate to "Salary Parameter Datamodel" under "Shared Folders/Samples/1. Overview/Data Models".
2. Click **Edit** to open the data model in the data model editor.
3. Under **Bursting**, select "Burst to Email". In the **SQL Query** box, change the following line:

```
d.department_name KEY,  
  
to  
  
d.department_name as "KEY",
```

4. Repeat the preceding step for the "Burst to File" bursting query.
5. Save the data model.

12 Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Oracle Fusion Middleware Installation Notes for Oracle Business Intelligence Publisher Trial Edition, 11g Release 1 (11.1.1) E28210-03

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