ORACLE BUSINESS INTELLIGENCE

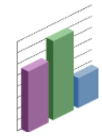
Administering and Reporting with Oracle BI Publisher

Quick Start Guide

Oracle BI Publisher is a reporting solution to efficiently author, manage, and deliver reports and documents.

This guide describes the most common tasks when administering BI Publisher, creating data models and reports, and viewing and scheduling reports.

For more information about these and other Oracle BI Publisher tasks, see Oracle BI Publisher documentation on Oracle Technology Network.



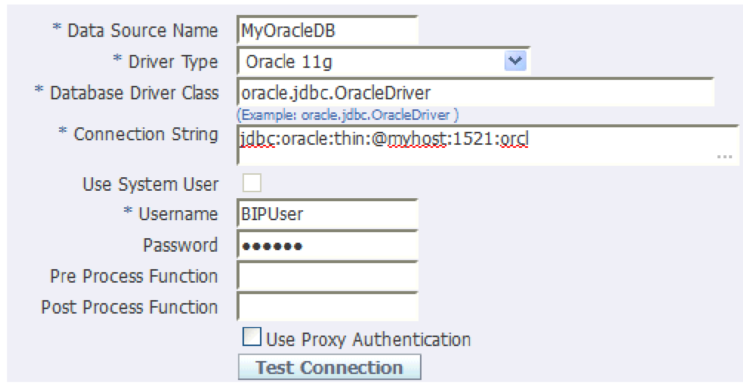
Administering BI Publisher

Creating Data Sources

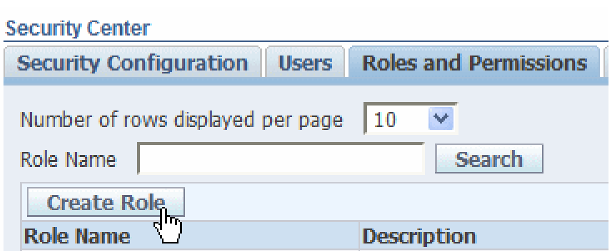
To create a connection to an Oracle Database:

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

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



Creating Roles



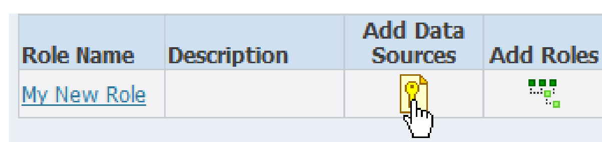
1. Click the **Administration** link.
2. Under **Security Center**, click **Roles and Permissions**.
3. Click **Create Role**.
4. Enter a **Name** for the role, and optionally enter a **Description**.
5. Click **Apply**.

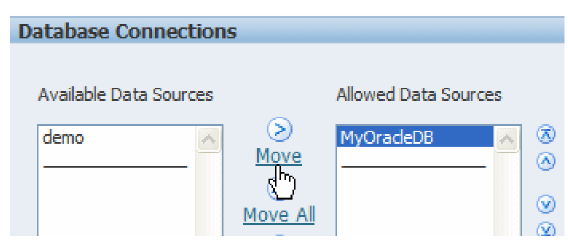
Note: These steps apply when you use BI Publisher security. If you integrate BI Publisher with another security option such as Fusion Middleware Security, see the appropriate documentation for your implementation.

Managing Roles

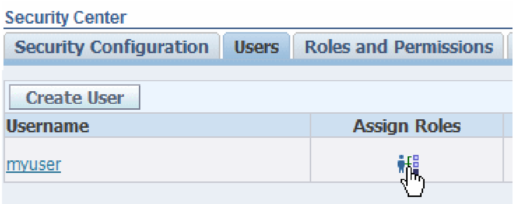
1. Add data sources to the role:
   a. Click **Add Data Sources**.
   b. For each data source type, move the data sources for the role from **Available** to **Allowed**.
   c. Click **Apply**.
2. Add roles to this role if you use BI Publisher security:
   a. Click **Add Roles**.
   b. Move the roles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

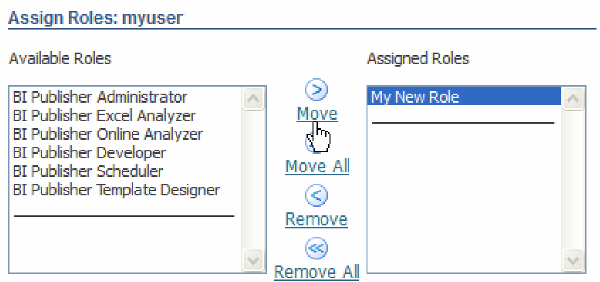
Note: **Add Roles** is available only when you use BI Publisher security. The seeded BI Publisher roles enable functional privileges such as Designing Templates and Scheduling Reports.





Creating Users





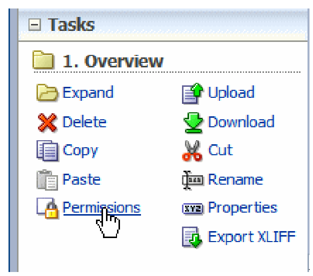
1. Click the **Administration** link.
2. Under **Security Center**, click **Users**.
   a. Click **Create User**.
   b. Enter a **Username** and **Password**.
   c. Click **Apply**.
3. Click **Assign Roles**.
4. To grant user privileges, move **Available Roles** to **Assigned Roles**.

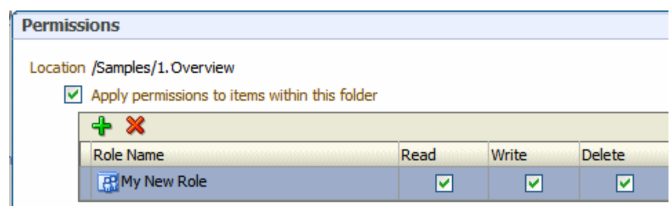
Note: If you integrate BI Publisher with another security option such as Fusion Middleware Security, see the appropriate documentation for your implementation.

Granting Catalog Permissions to a Role

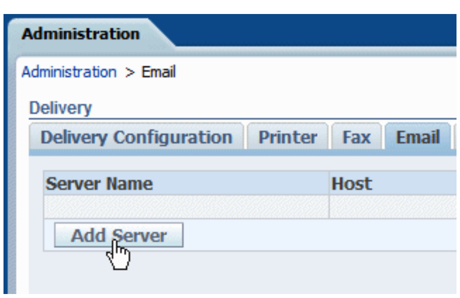
A role must be granted access to folders and objects in the catalog to perform actions on those objects.

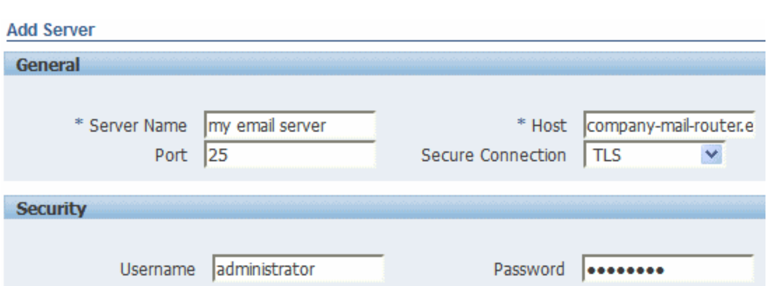
1. Select the folder or object in the catalog.
2. In the **Tasks** pane, click **Permissions**.
3. Click **Add** to add role permissions to the object.
4. In the **Add Roles** dialog, enter the role name or partial role name, and then click **Search**.
5. Move the role to the **Selected Roles** list,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





Creating 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 email server details:
   a. Enter a unique **Server Name**.
   b. Enter the email server **Host** (for example, mail.example.com) and **Port**.
   c. (Optional) Select the **Secure Connection** type.
   d. (Optional) Enter the server **Username** and **Password**.
5. Click **Apply**.

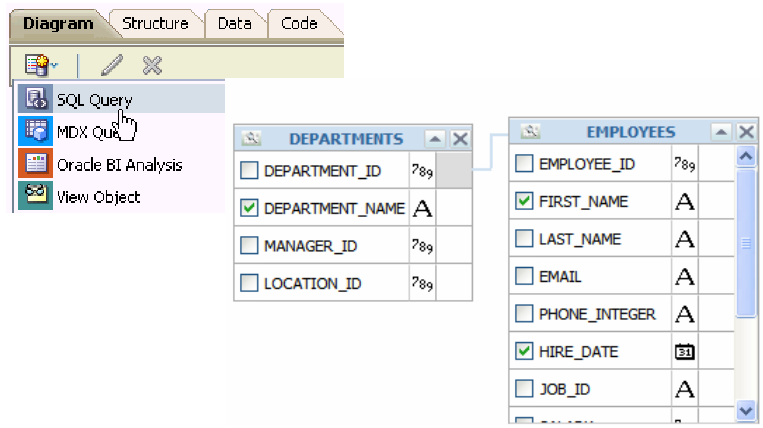
Report Viewers can now use this **Destination Type** for BI Publisher scheduled jobs.

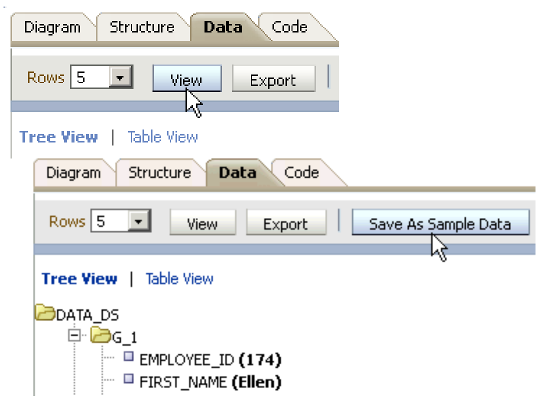
Creating Data Models and Reports

Creating Data Models

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

1. From the **New** menu, select **Data Model**.
2. Click **New Data Set**.
3. From the **New Data Set** menu, select **SQL Query**.
4. Enter the **Name** of the data set.
5. Select the **Default Data Source**.
6. Click **Query Builder**.

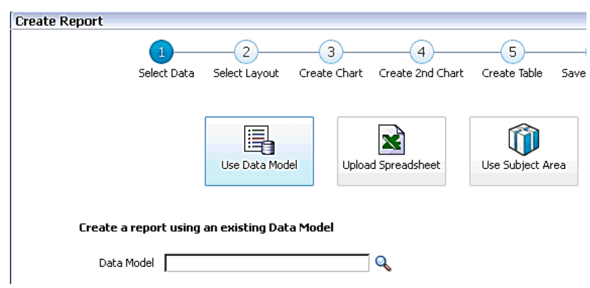


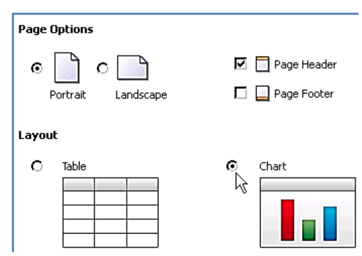


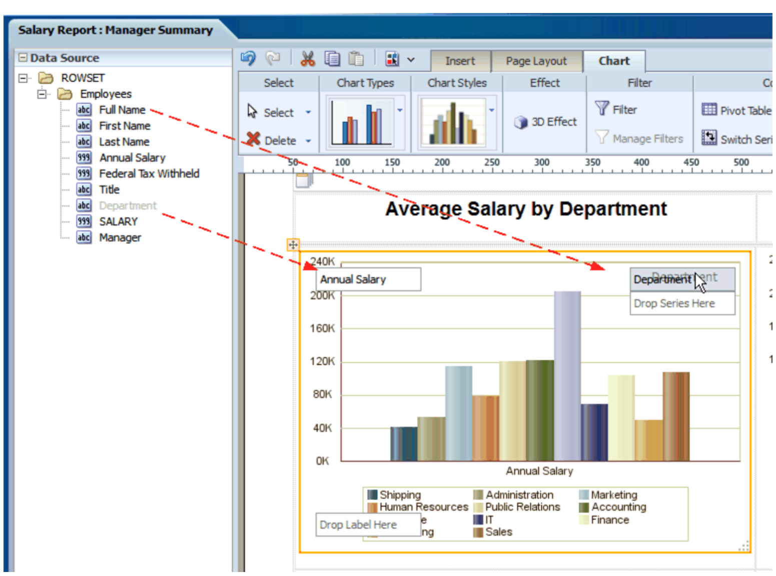
7. Select the tables and columns to include, optionally create joins, and add conditions.
8. Click **Save**.
9. (Optional) Add **Parameters**, and associate each parameter with a **List of Values**.
10. Click the **Structure** tab to edit the **Display Names** of data elements.
11. Click the **Data** tab, and then click **View** to generate sample data.
12. Select **Save As Sample Data**, and then click **OK**.
13. Save the data model.

Creating Reports and Layouts

1. From the **New** menu, select **Report**.
2. Choose a data model, spreadsheet, or subject area, and then click **Next**.
3. Select the page options and layout, and then click **Next**.
4. Add **Data Source** elements to the report components (for example, charts, data tables, pivot tables) to create the layout, and then click **Next**.
5. Select one of the following options:
   - Select **View Report** to view and run the report.
   - Select **Customize Report Layout** to customize the report in the Layout Editor.



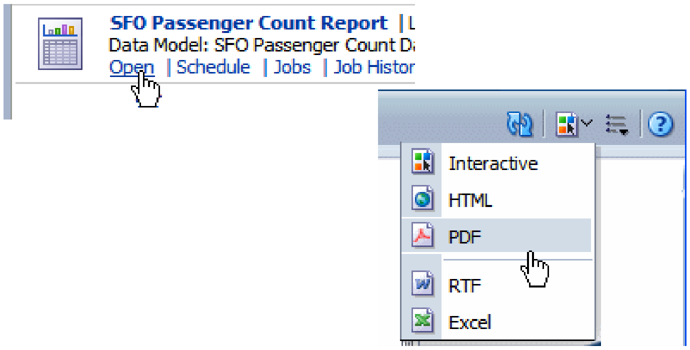




6. Click **Finish**.
7. Select the report folder, enter the report name, and then click **Save**.
8. If you selected to customize the report in the Report Layout Editor, use the ribbon toolbar or the **Properties** pane to control the look and feel of the layout components.
9. (Optional) Preview in different formats as you build the layout.
10. Save the layout.
11. Click **Return**.
12. (Optional) Customize **Parameters**, **Properties**, and **Layout Properties**.

Viewing and Scheduling Reports

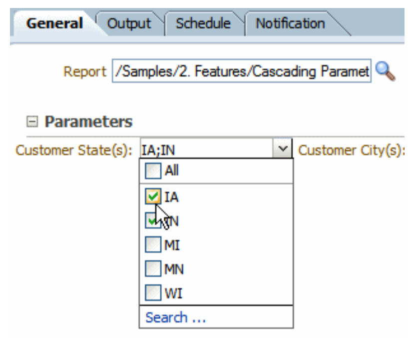
Viewing Reports

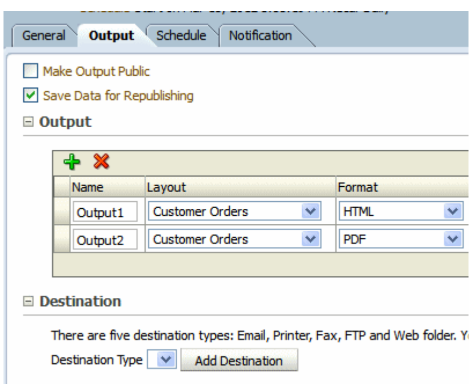


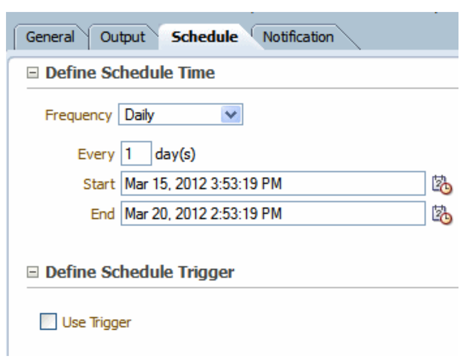
1. From the **Home** page, click **Catalog**.
2. Navigate the catalog folders to locate the report.
3. Click **Open**. The report displays the default layout and format.
4. Click other tabs to view other layouts of the same data.
5. To view other output types, click **View Report**, and then select the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

Scheduling Report Jobs

1. From the **New** menu, select **Report Job**.
2. Click **Search** 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.
6. Click **Add** to add more output files to this job.
7. Select the layout and format for each output.







8. Click **Add Destination**.
9. Define the destination (for example, email or printer) for each output file.
10. Click **Schedule**.
11. Define the **Frequency** (for example, Once, Daily, Weekly) for the job.
12. Click **Submit**.
13. Enter a Name for the **Report Job**.
14. Click **OK**.

Viewing Report Job Outputs

1. From the **Open** menu, select **Report Job History**.
2. By default, all the report jobs that you submitted 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.