Open World 2008 Hands-On Lab

JD Edwards EnterpriseOne and BI Publisher – Enterprise edition

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1 Tutorial **Overview**

JD Edwards EnterpriseOne Tools release 8.98 delivers a JDBC (Java Database Connectivity) driver. This driver allows customer to access JD Edwards EnterpriseOne data from outside the JD Edwards application while still enforcing JD Edwards EnterpriseOne security and data formatting. While this driver can be used from various applications or integrations, one of the keys uses of the JDBC driver is to access JD Edward EnterpriseOne data from Oracle BI Publisher Enterprise edition. The use of the JD Edwards JDBC driver with Oracle BI Publisher will provide customers enhanced reporting capabilities. This lab demonstrates some of these capabilities.

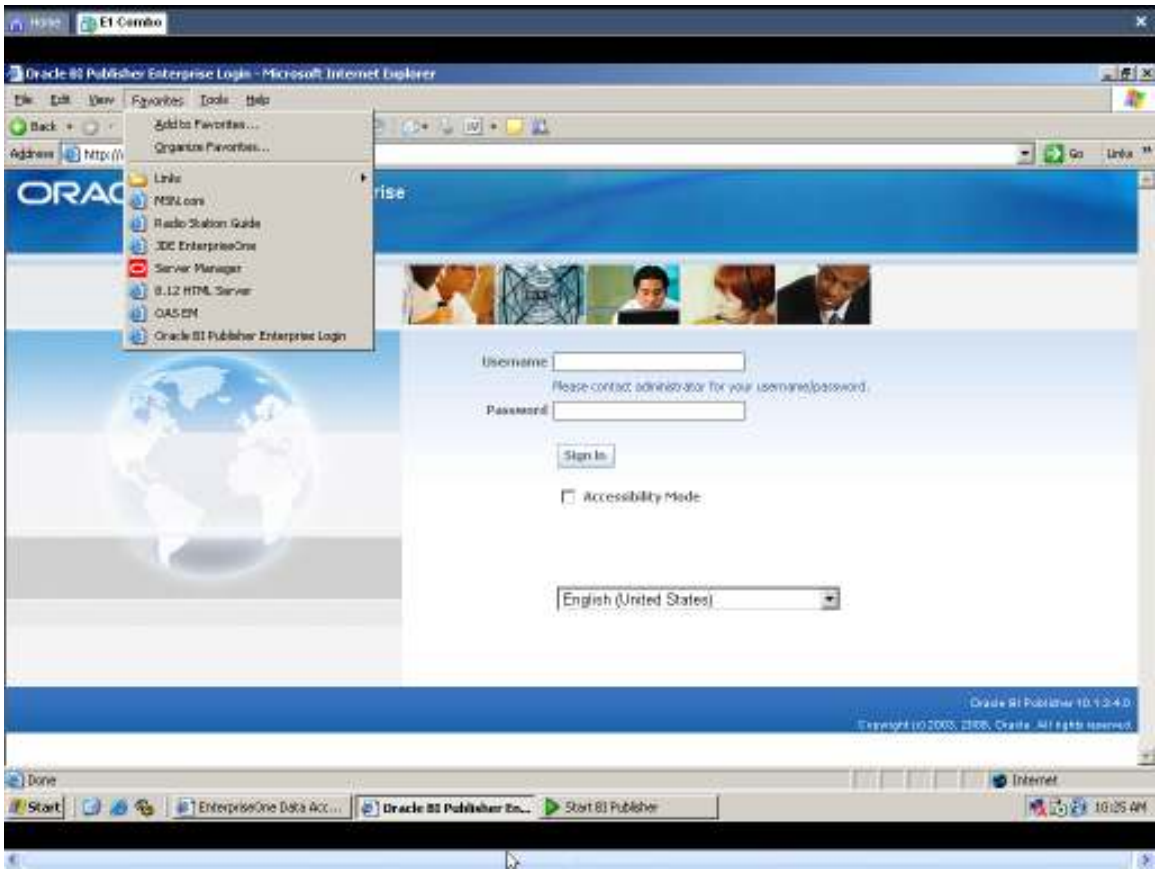
This tutorial details the steps to:

- Create a BI Publisher report.
- Define a dataset to access JD Edwards EnterpriseOne data.
- Use BI Publisher desktop to create a template.
- Load and test the template in BI Publisher with the JD Edwards EnterpriseOne data.

2 BI Publisher

2.1 Sign-on

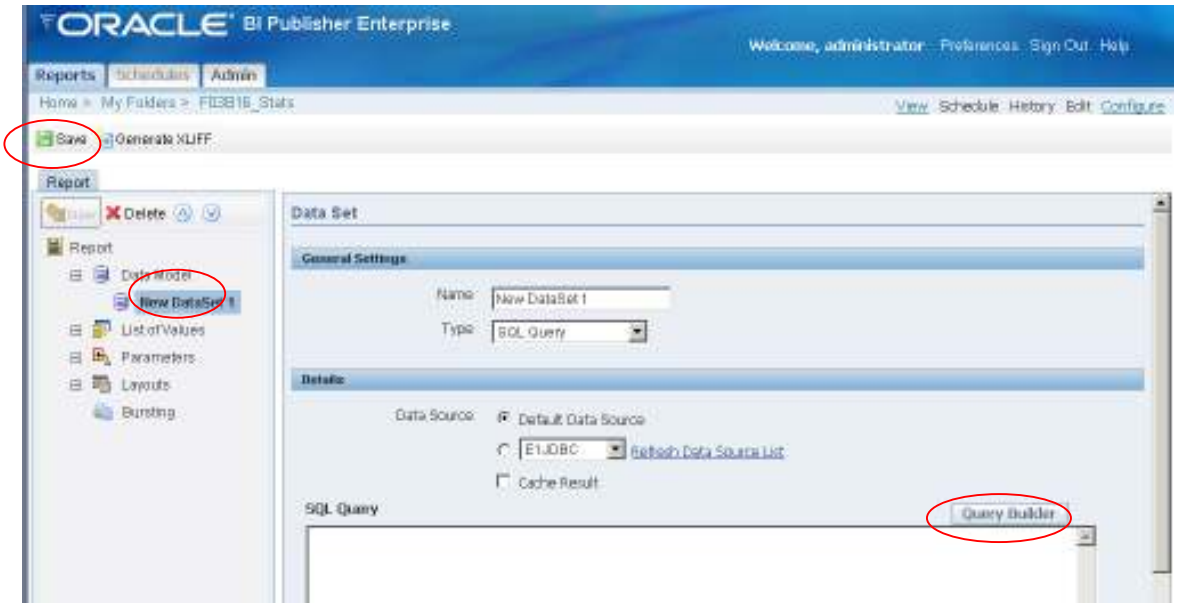
1. Start Internet Explore and from Favorites select Oracle BI Publisher Enterprise Login



2. Enter Username and Password
   - Username: Administrator
   - Password: Administrator

2.2 Create a new report

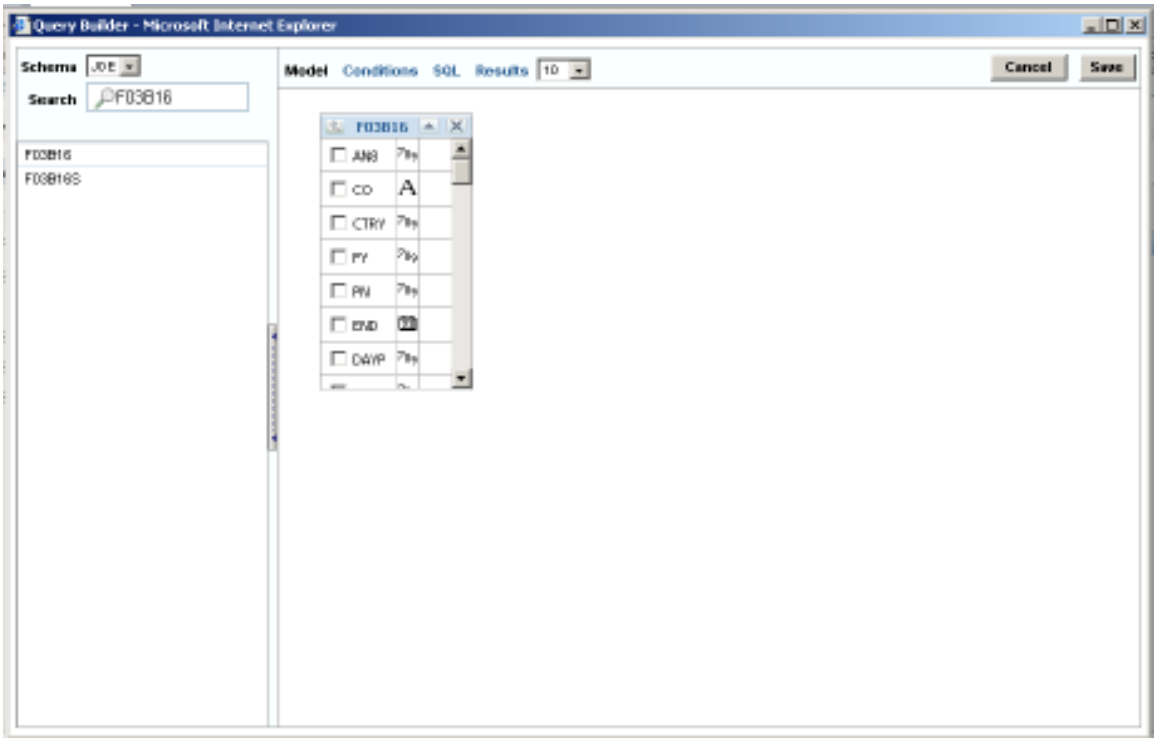
1. Click on My Folders.
2. Once the report properties have been saved, a data set needs to be defined. To define a new data set, click on “Data Model” on the left hand menu and then click “New”.



3. On the “Data Set” window, enter a data set Name and Type. For “Name” enter F03B16_F0010, validate that the “Type” is set to SQL Query and then click “Save”.

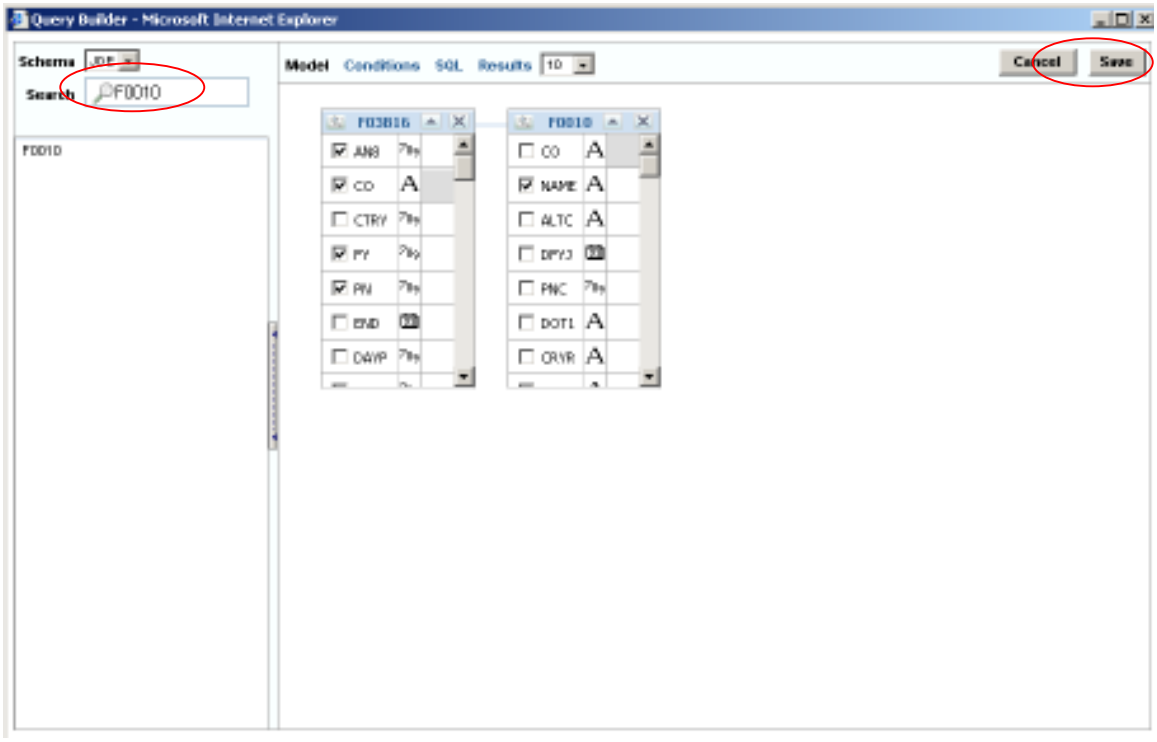
4. Once you have saved the data set, click the “Query Builder” button just above the SQL Query box.

5. The Query Builder window will appear. It may take several seconds for the Query Builder to load the list of tables. A message may appear that there are too many tables to load. If this message appears, type “F03B16 in the search field and select it from the result set. The table will appear on the right side Model window.



6. Once the F03B16 table is in the Model window, type “F0010” in the search field and select it from the result set. Again, the table will appear on the right side Model window.

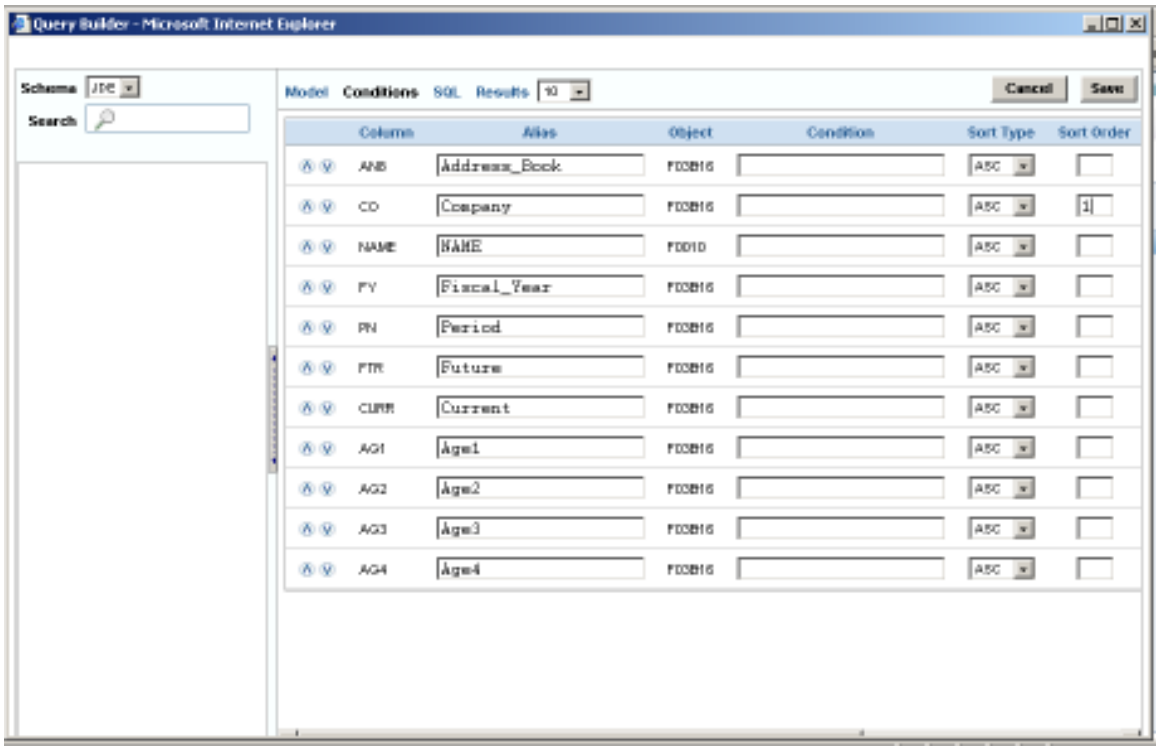
7. In the Model window, drag CO from the F03B16 onto CO on the F0010 and click. This will create a join on the two tables on the CO (company) fields. The join is indicated by a gray box in the right column.
8. The next step is to select the field for the report.
    a. On the F03B16 check the following:
        i. AN8
        ii. CO
        iii. FY
        iv. PN
        v. FTR
        vi. CURR
        vii. AG1
        viii. AG2
        ix. AG3
        x. AG4
    b. On the F0010 check the following:
        i. Name
9. Once the fields have been selected click “Save”.



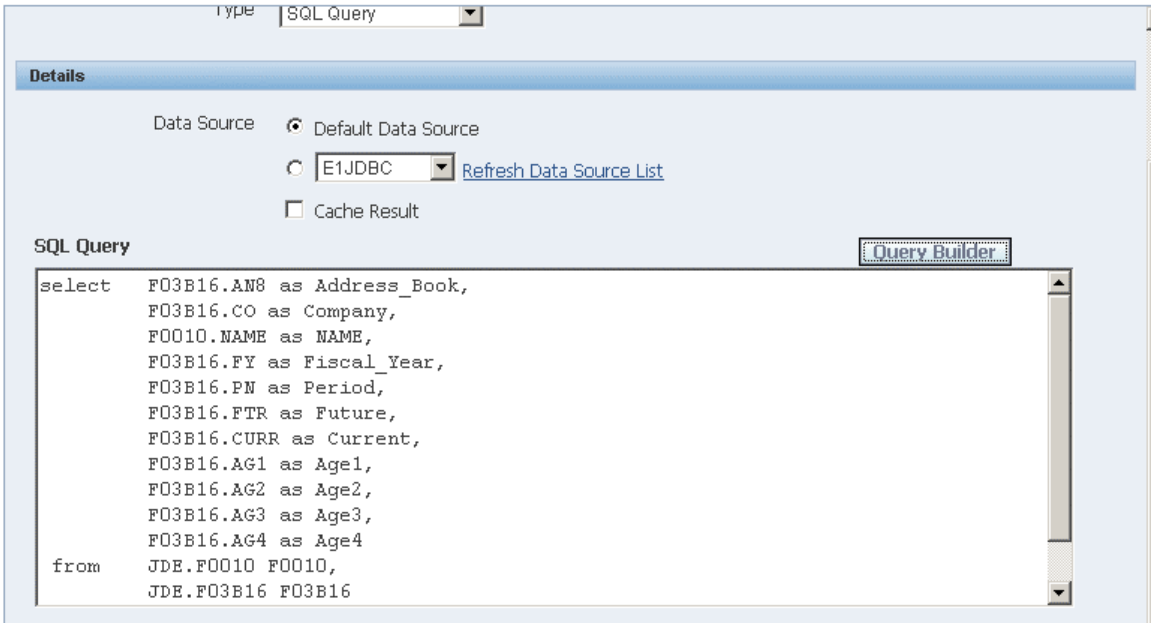
10. Click on Query Builder to return to the model.
11. Click on the “Conditions” option on top of the window.
12. On the Conditions window, enter a “1” in the Sort Order for CO.
13. To have the column names more descriptive, the Alias for each column can be changed. Enter the following:
    a. For AN8, Address_Book,
    b. For CO, Company,
    c. For FY, Fiscal_Year,
    d. For PN, Period,
    e. For FTR, Future,
    f. For CURR, Current

g. For AG1, Age1,
h. For AG2, Age2,
i. For AG3, Age3,
j. For AG4, Age4,

14. Click Save to commit these modifications.



15. Back on the Data Set window, BI Publisher has created the SQL statement for the model.

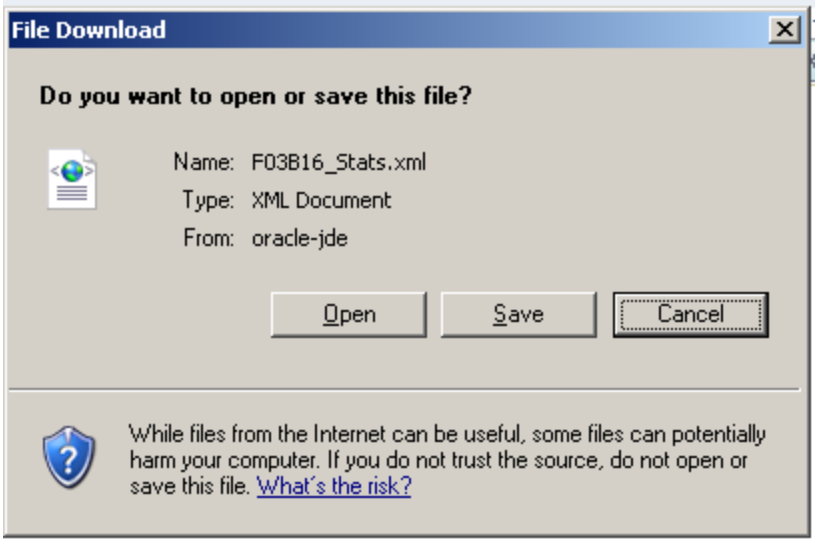


16. Click Save to validate that the data set has been saved.
17. Once the data set has been saved, click on the “View” option.

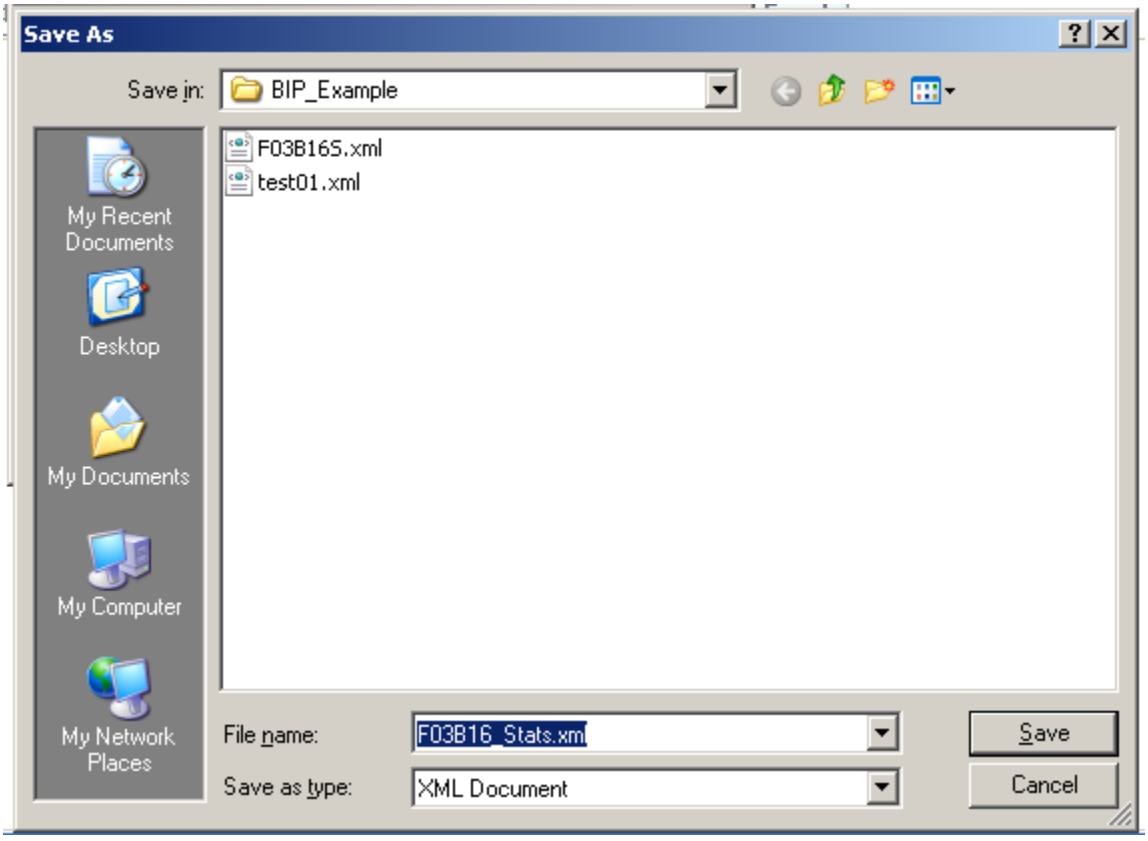
18. In the “View” window, click the “View” button to see the XML data that is generated.

19. Once the XML data is displayed, click on the “Export” button to export the data for template creation.

20. Click Save.

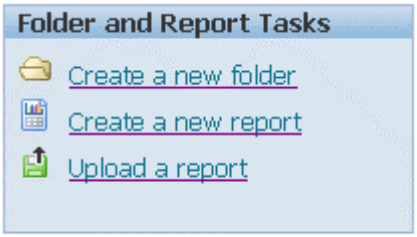


21. Save the xml file to the E:\BIP_Example directory with a file name of F03B16_Stats.xml and then press Save.

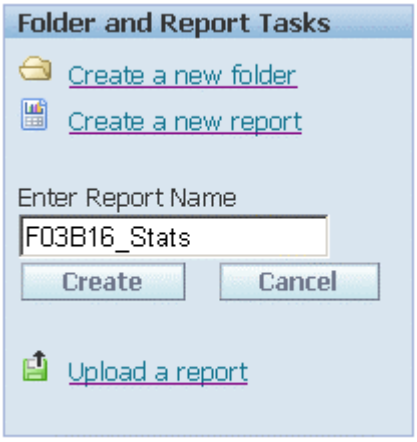


22.

23. On the left hand menu click on “Create a new report”.



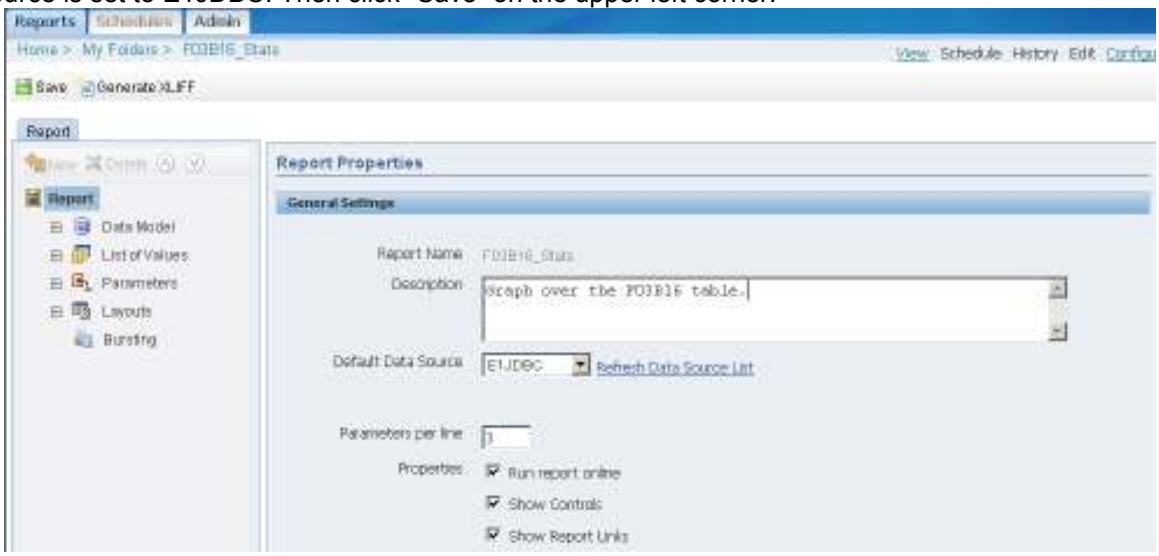
24. On the left hand menu, enter F03B16_Stats in the “Enter Report Name” field and click on Create.



25. Once “Create” has been clicked, the report definition will appear. Once this appears click on the report name “F03B16_Stats” to define the report properties.

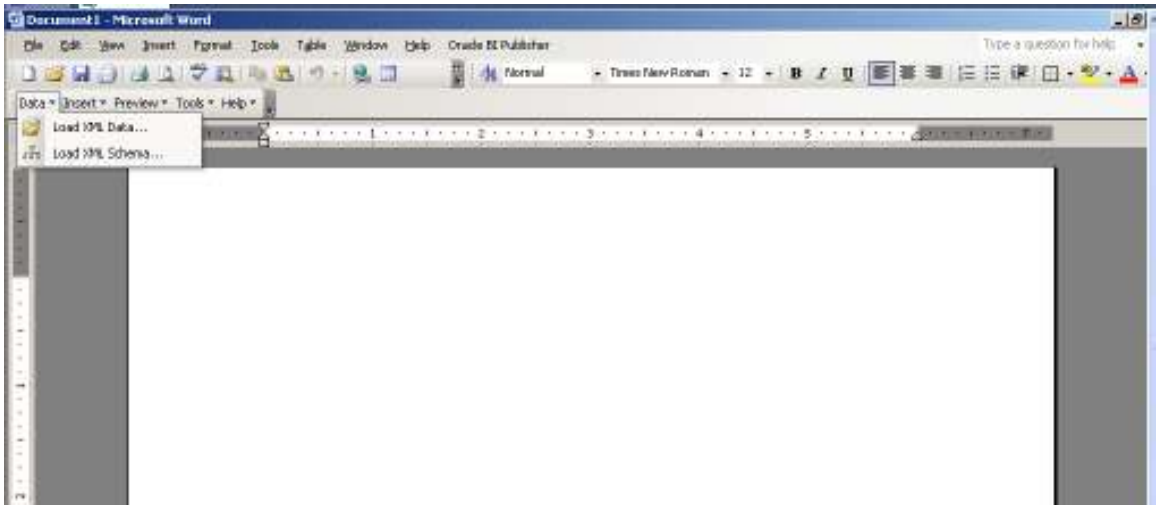
26. Click on Edit to access the Report Properties.

27. On the Report Properties screen, enter a Description for the report. Also validate that Default Data Source is set to E1JDBC. Then click “Save” on the upper left corner.

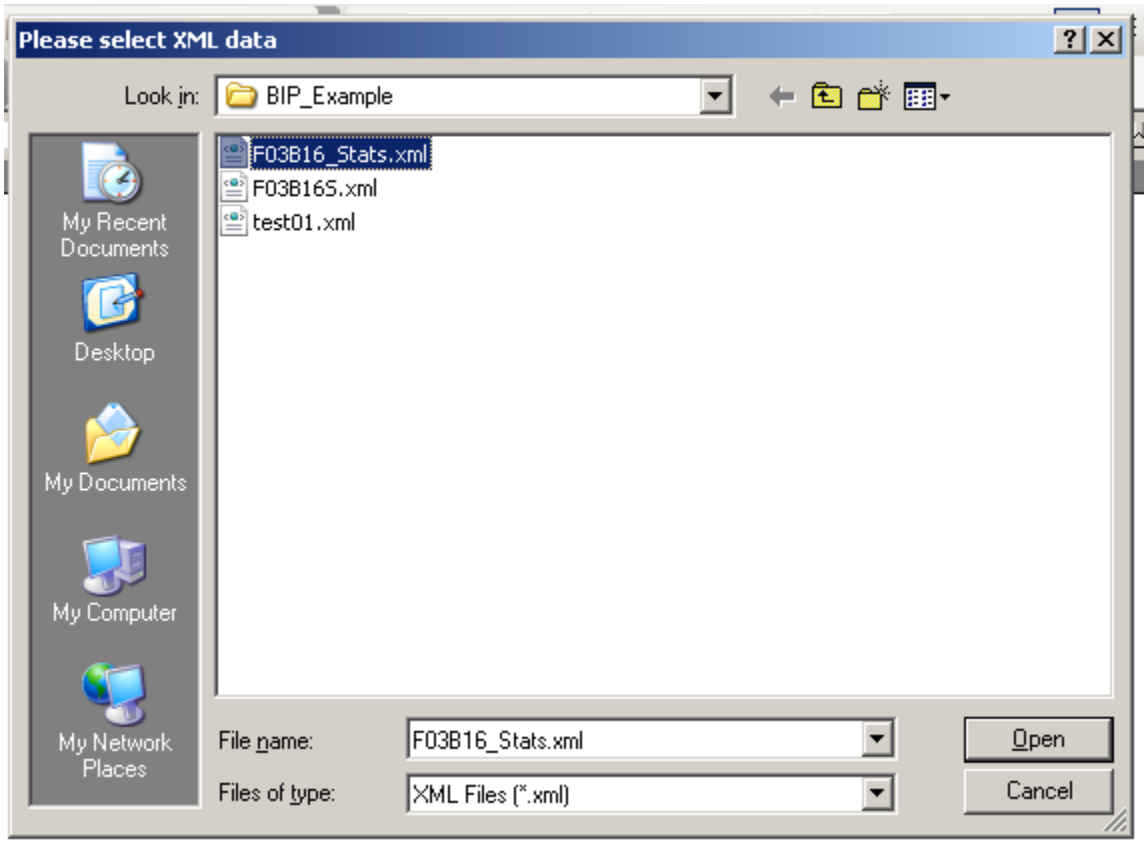


2.3 Create Template with BI Publisher Desktop

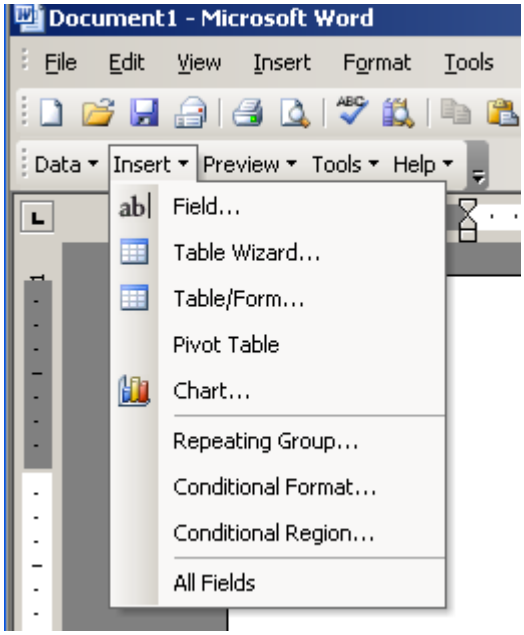
1. The template for our report will be created using Word. Go to the Start menu to open Word.
2. Once Word has opened, open the Data drop-down menu and select “Load XML Data”.



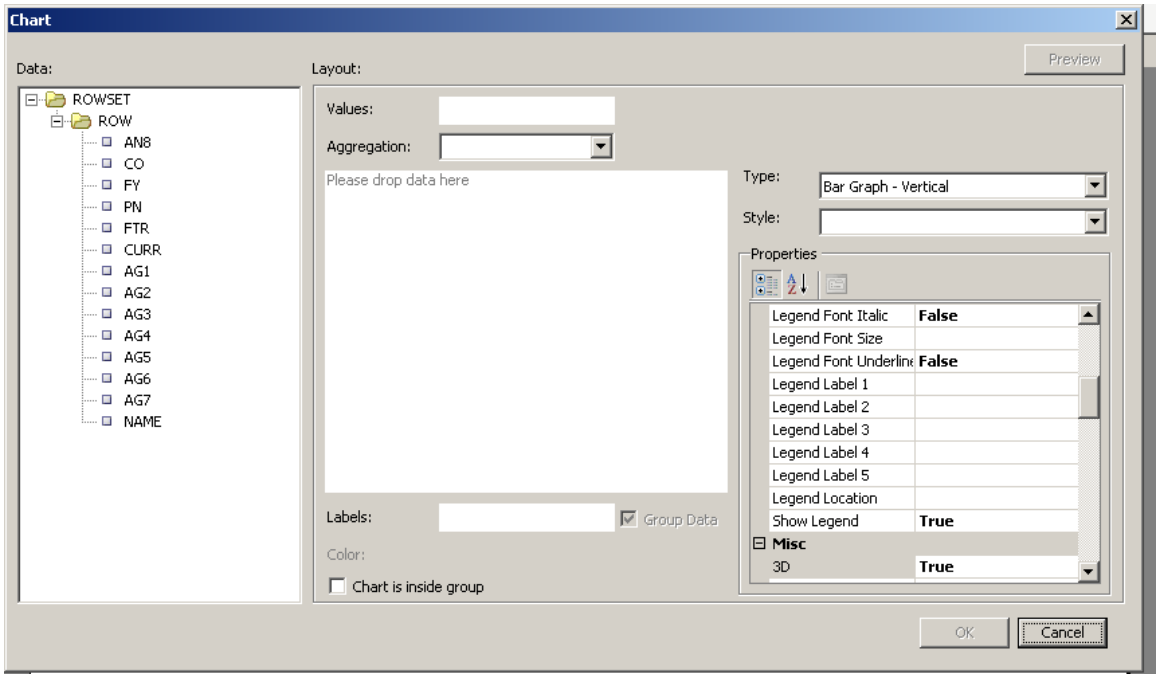
3. Open the file that was saved from step 24. (The xml file in directory E:\BIP_Example with the file name of F03B16_Stats.xml.)



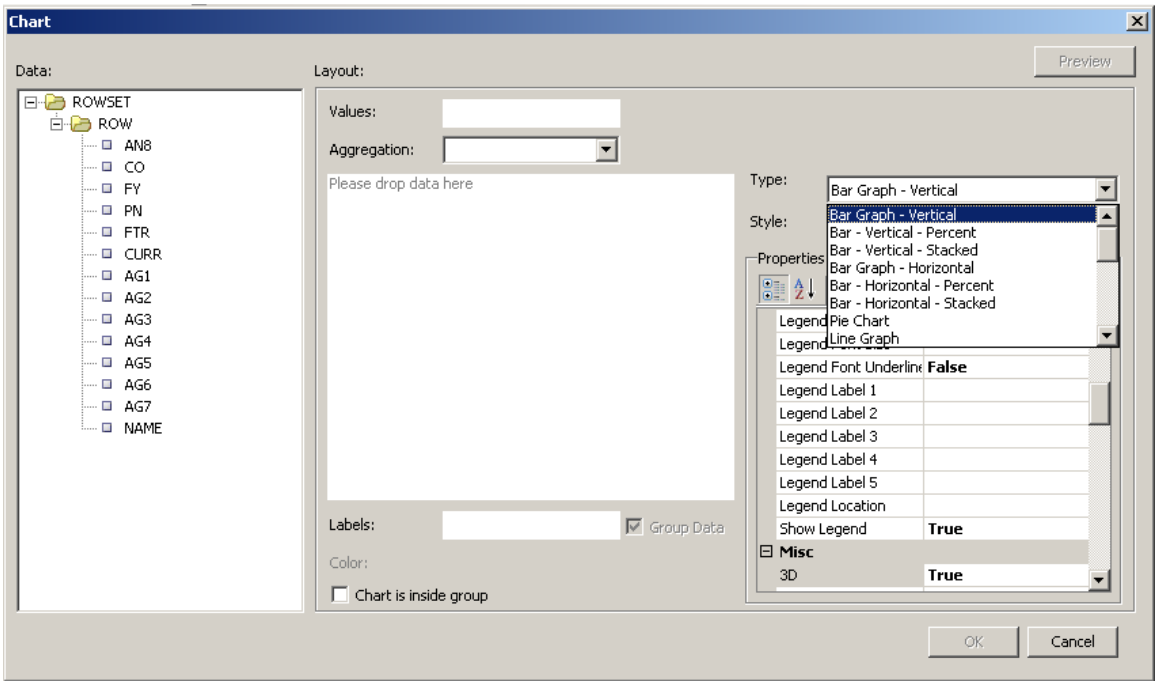
4. While no data will appear on the screen the data as been loaded.
5. From the Insert drop-down menu, select Chart.



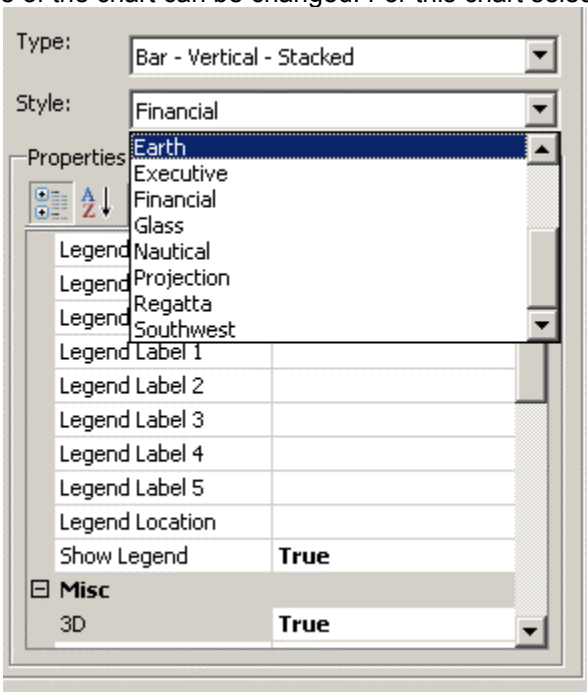
6. A new window will appear to define a chart for the template.



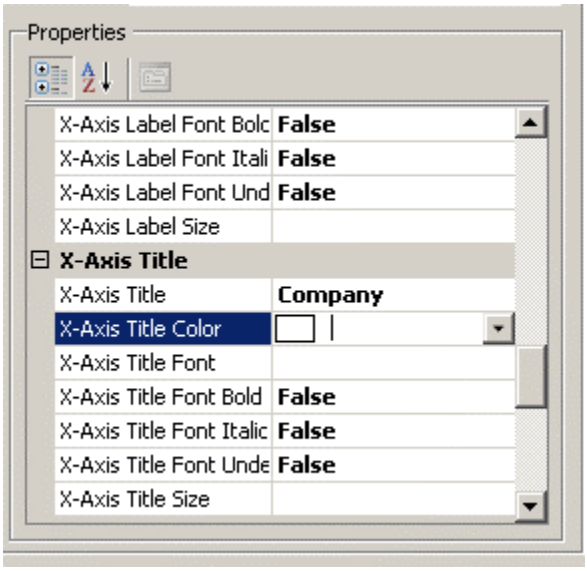
7. First a Chart Type must be selected. For this example, select Bar Graph – Vertical - Stacked.



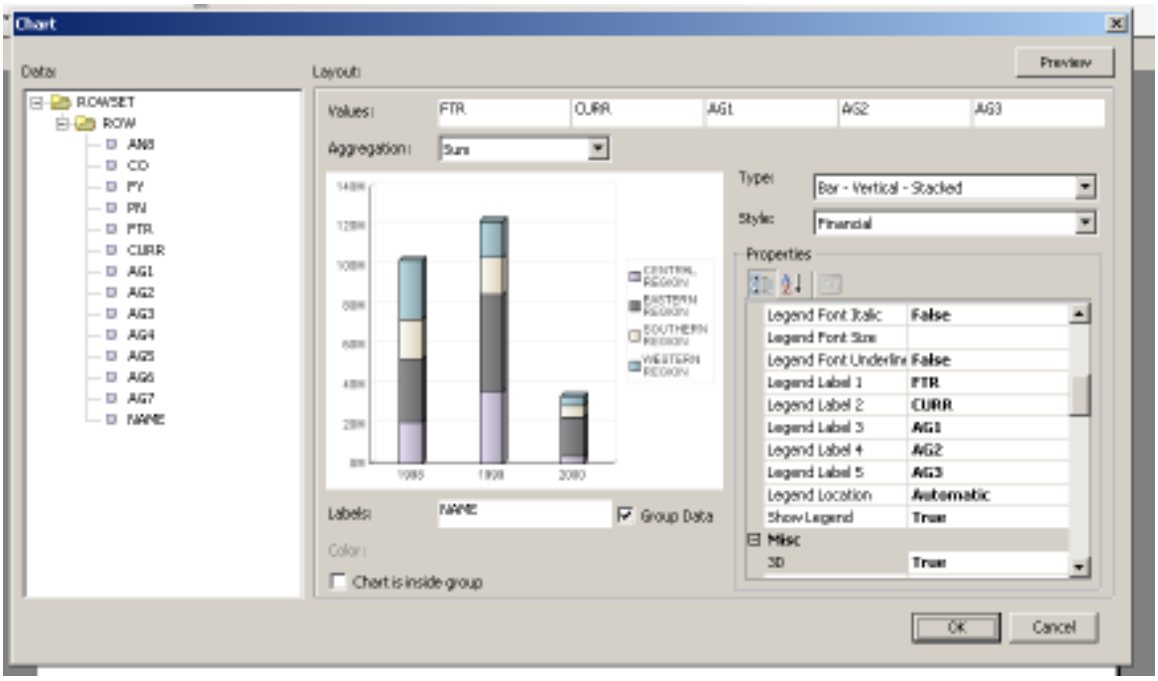
8. The style of the chart can be changed. For this chart select “Financial” from the Style drop down.



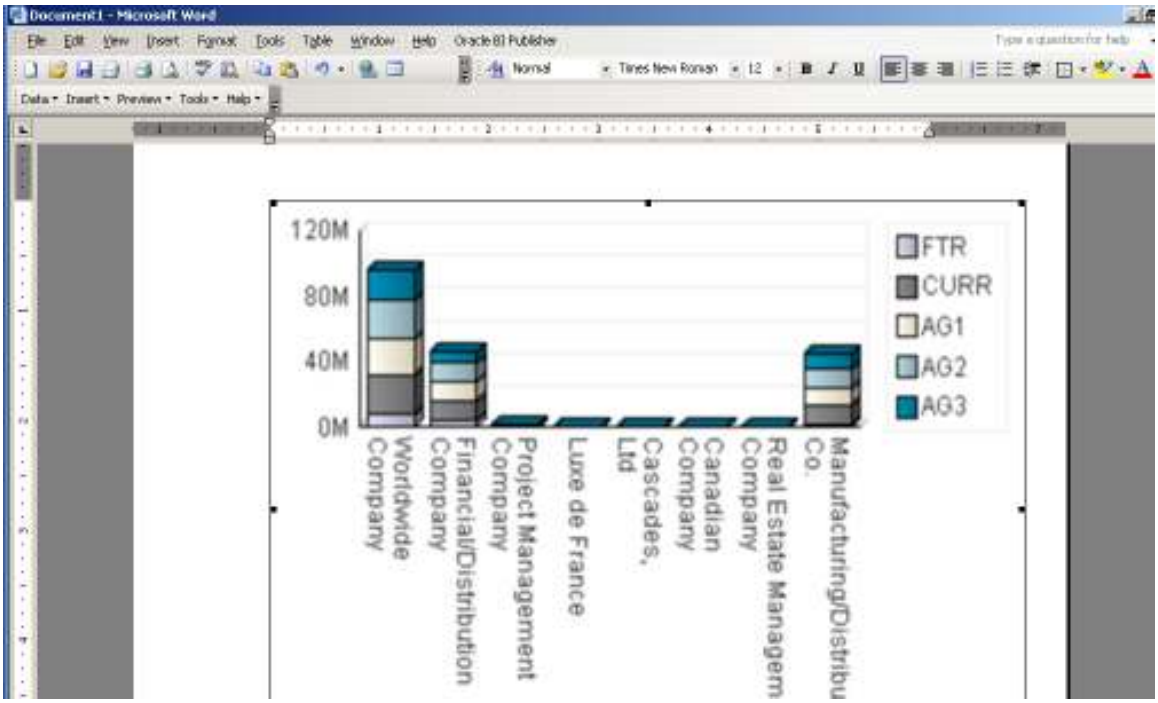
9. To assign a title for the X-Axis, enter Company in the X-Axis Title field. You may have to scroll down in the Properties window to get to the X-Axis Title field.



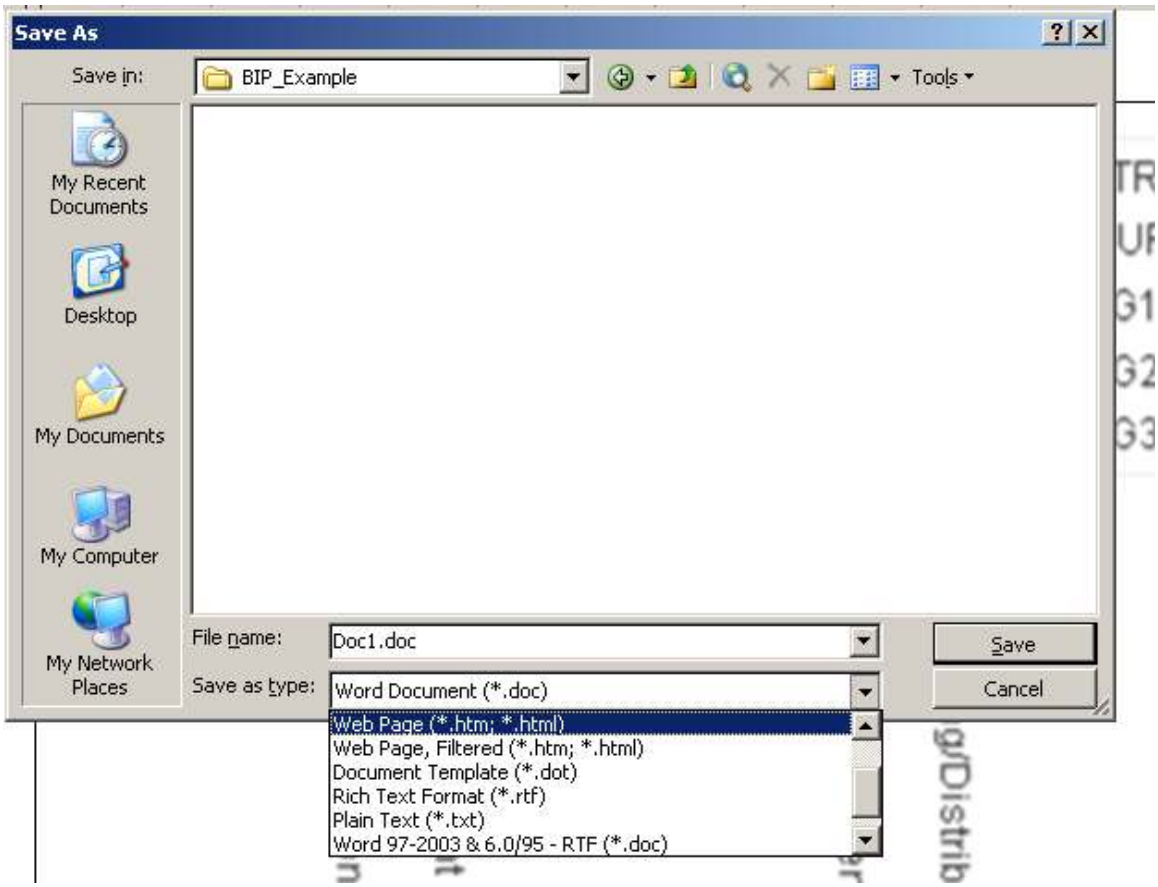
10. To assign data to the chart, drag Name from the ROWSET to Labels.
11. Next Drag FTR, CURR, AG1, AG2, and AG3 to the Values fields.
12. Click OK.



13. The chart with the values for the xml file will be displayed. To make the chart large just click on the side of the chart and drag it to the desired size.



14. Once the chart layout is correct, save the Word document. To save select Save As from the File drop-down menu.
15. **The BI Publisher template file must be saved as a RTF file.** Give the file a name of F03B16_Template.rtf in the BIP_Example directory.
16. Once the template is saved, close Word and return to BI Publisher.


Save As
Save in:
BIP_Example
Tools
My Recent Documents
Desktop
My Documents
My Computer
My Network Places
File name:
Doc1.doc
Save as type:
Word Document (*.doc)
Save
Cancel
Web Page (*.htm; *.html)
Web Page, Filtered (*.htm; *.html)
Document Template (*.dot)
Rich Text Format (*.rtf)
Plain Text (*.txt)
Word 97-2003 & 6.0/95 - RTF (*.doc)

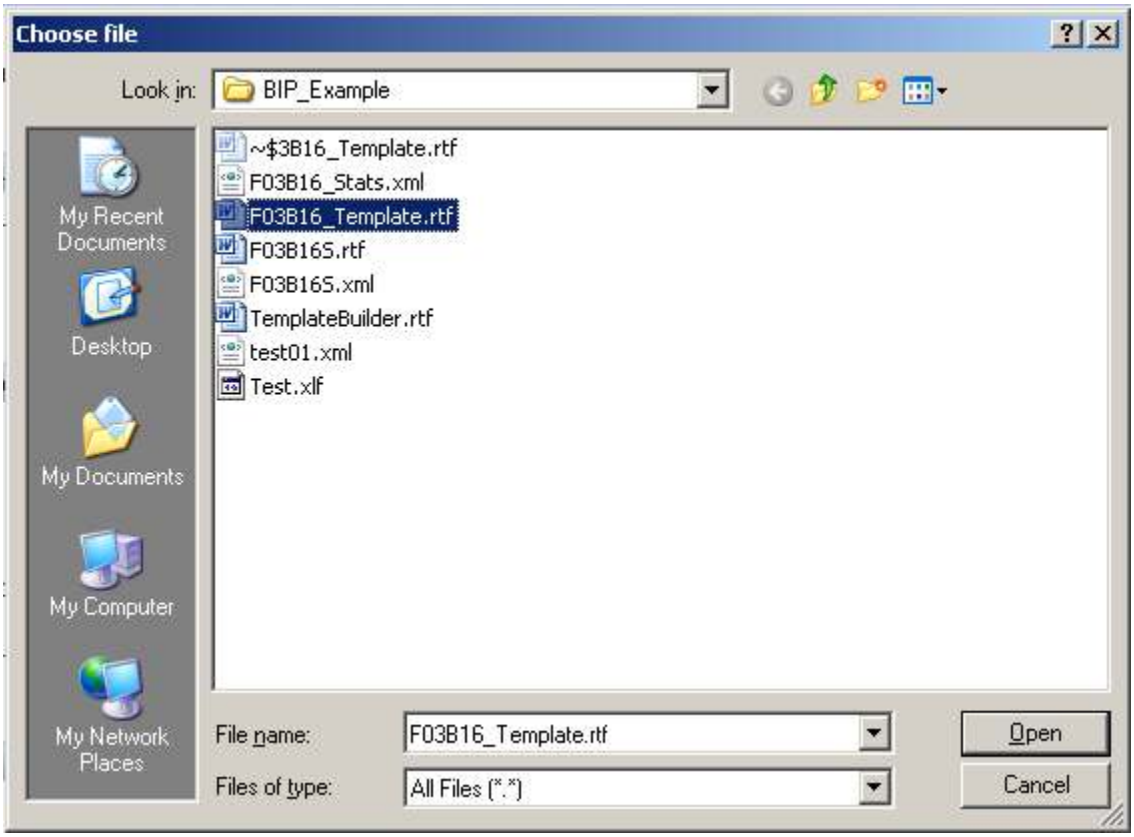
1.

2.4 Upload Template

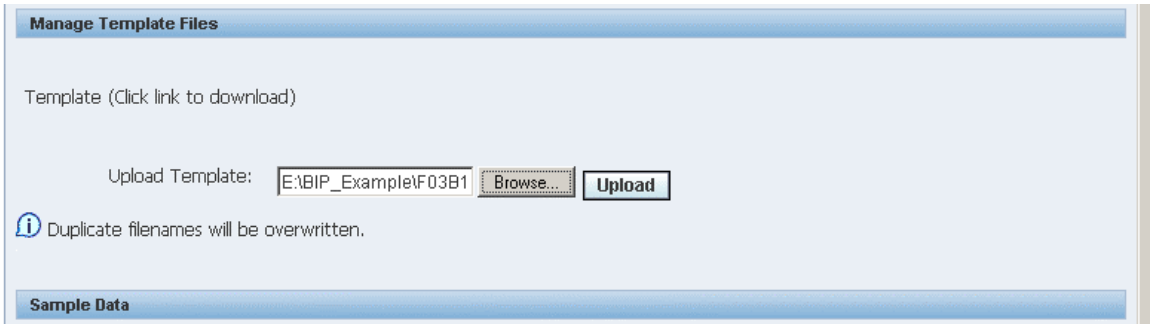
1. Back in BI Publisher, click Edit.
2. Click on Layouts in the left hand menu.

3. Under the Manage Template Files, click on browse.

4. Select the template that you created in Word, F03B16_Template.rtf.



5. Press Upload to upload the template into BI Publisher.



6. Now create a new template by pressing “New”.
7. Give the template a name of F03B16_Stat_Chart and select Output Format of “All Formats”.

8. Save the template by pressing the Save button.