Open World 2008 Hands-On Lab

JD Edwards EnterpriseOne Embedded BI Publisher

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1 Tutorial **Overview**

JD Edwards EnterpriseOne Tools release 8.97 delivered an embedded integration with Oracle BI Publisher. This embedded solution allows customer to associate a BI Publisher template with a JD Edwards EnterpriseOne UBE. With embedded BI Publisher, customers can leverage the power of existing UBEs to manipulate and extract data from JD Edwards EnterpriseOne. Furthermore, customers can leverage the functionality of BI Publisher to produce high resolution output and various delivery methods such as printing and email. This lab demonstrates some of these capabilities.

This tutorial details the steps to:

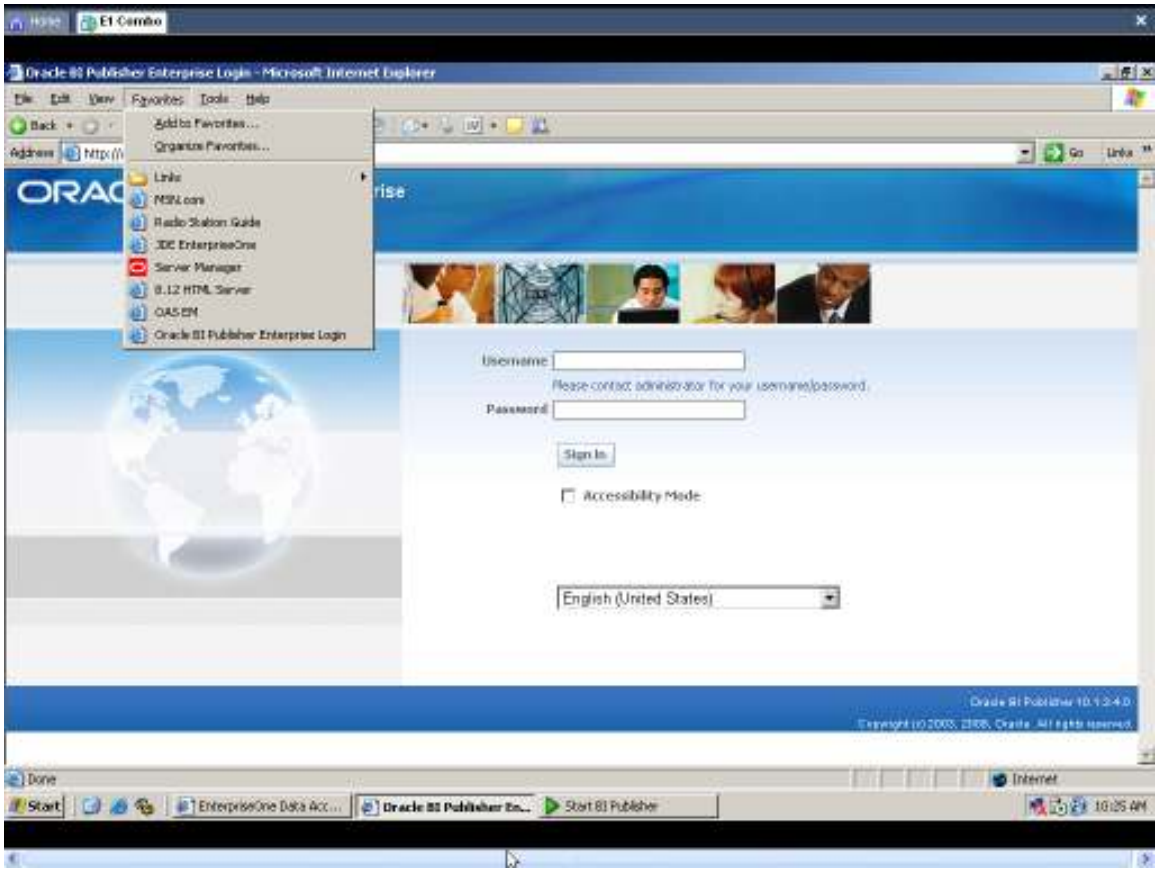
- Create new BI Publisher templates.
- Associate BI Publisher templates with an UBE.
- Executing the UBE with the associated template.

2 Generate XML

2.1 Sign-on

1. It is important to note that a Report Definition has already been created for this example. Instructions on how to create a Report Definition is documented in the JD Edwards EnterpriseOne BI Publisher guide.

2. Start Internet Explore and from Favorites select JDE EnterpriseOne



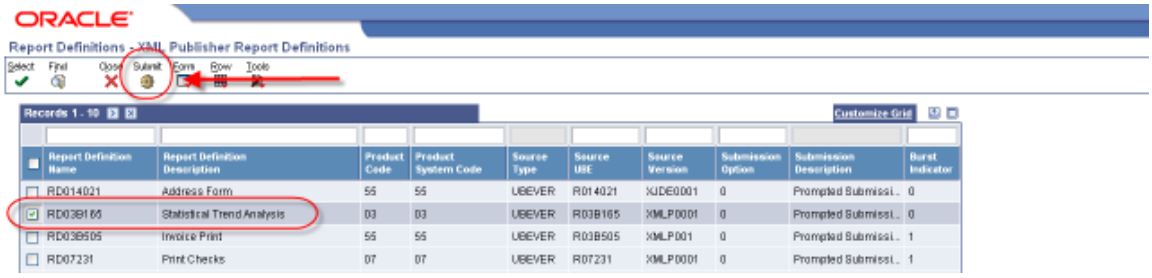
3. Enter Username and Password
   - Username: JDE
   - Password: JDE

2.2 Generate XML Source Code

1. Enter GH9111 in Fastpath and Click Double Arrows

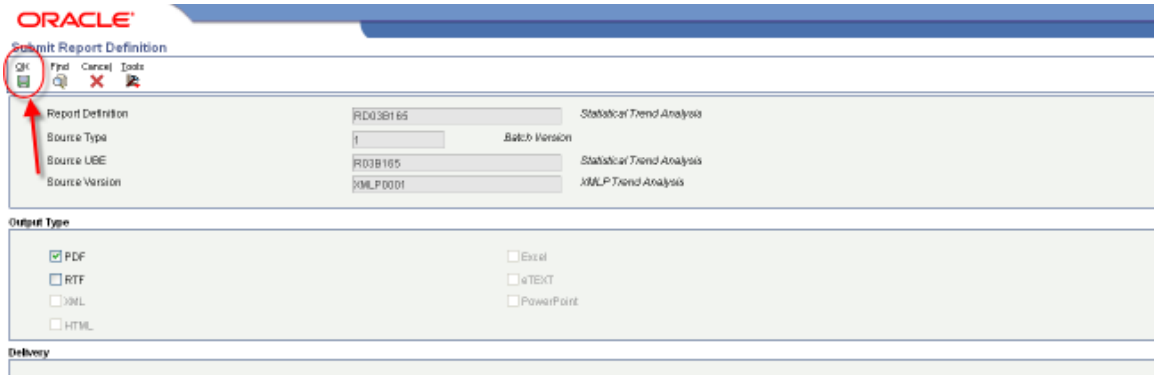
2. On the left hand menu click Report Definitions

3. Click the Checkbox for Grid Row Report Definition Name RD03B165
4. Click Submit



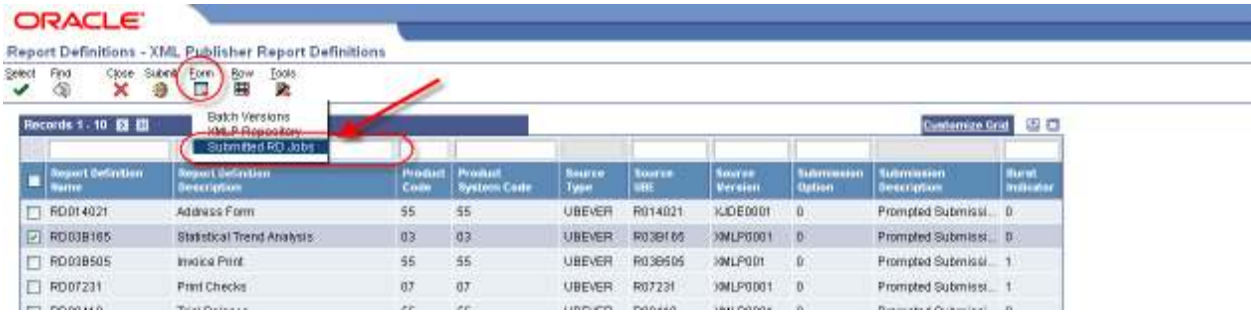
5. Click Submit

6. Click OK

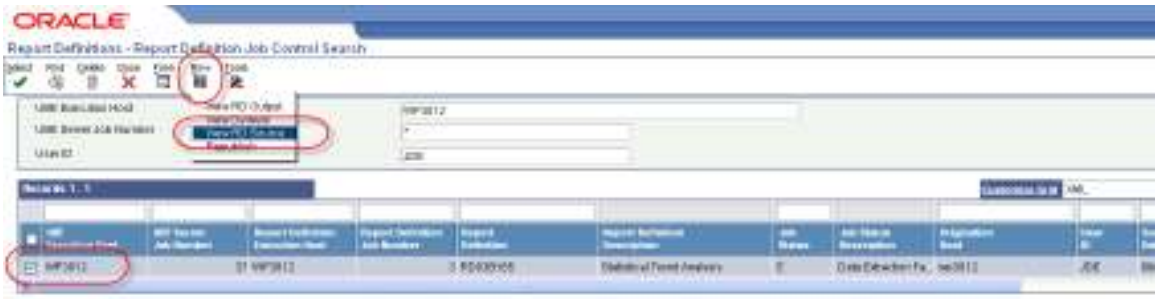


2.3 Retrieve XML Source Code

1. Click Form / Submitted RD Jobs



2. Click any Grid Row Checkbox
3. Click Row / View RD Source



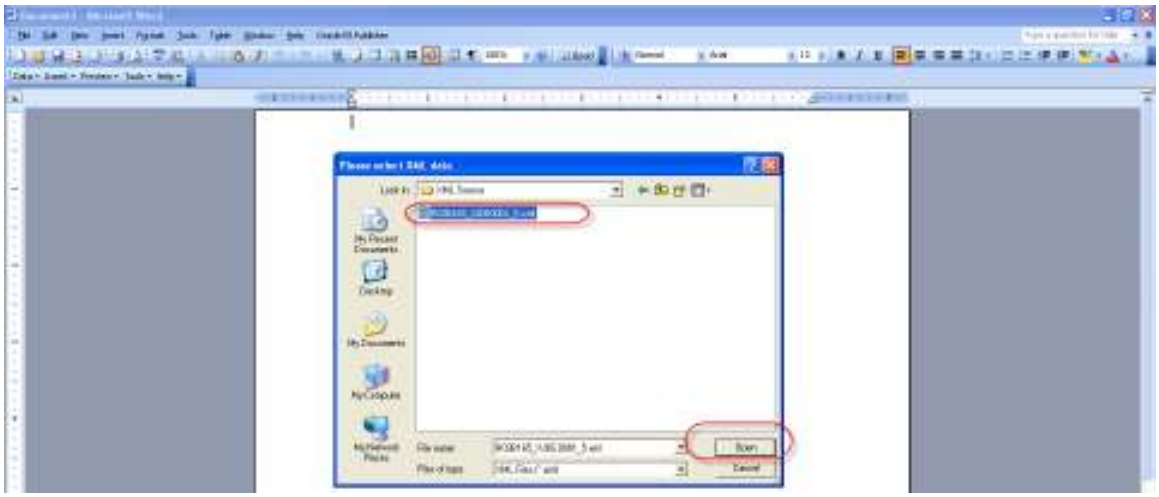
4. When Prompted click Save and Save the file to your desktop

1.

2.4 Create BI Publisher Template in MS Word

1. Log off JD Edwards EnterpriseOne
2. Open up MS Word
3. The first thing you need to do is load the XML Source file you just saved to the desktop
4. On the Template Builder Toolbar Select Data / Load XML Data

5. Find the File you just downloaded on your desktop and click Load

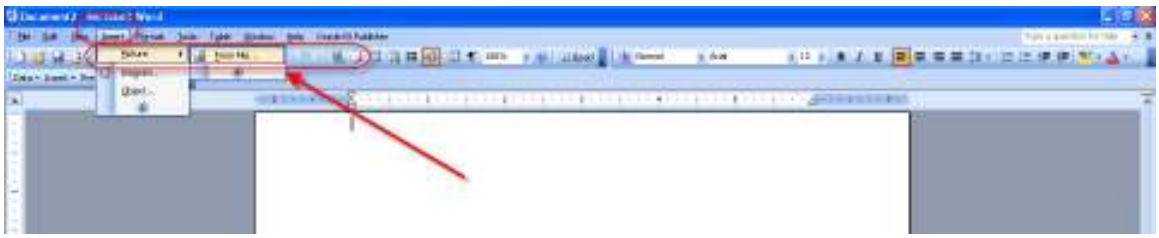


6. Click OK when prompted on Data Loaded Successfully window

7. Now that the XML source has been loaded you can now begin to create your Template

Add Picture as Logo

8. In MS Word Click Insert / Picture / From File



9. Select Picture from My Pictures Directory and Click Insert

10. Click on the Picture
11. Click the Center Icon to center the picture

12. Click to the right of the picture and click Enter a few times to move cursor down page a few lines
13. Click File / Page Setup

14. Click Landscape
15. Click OK

16. Click File / Save

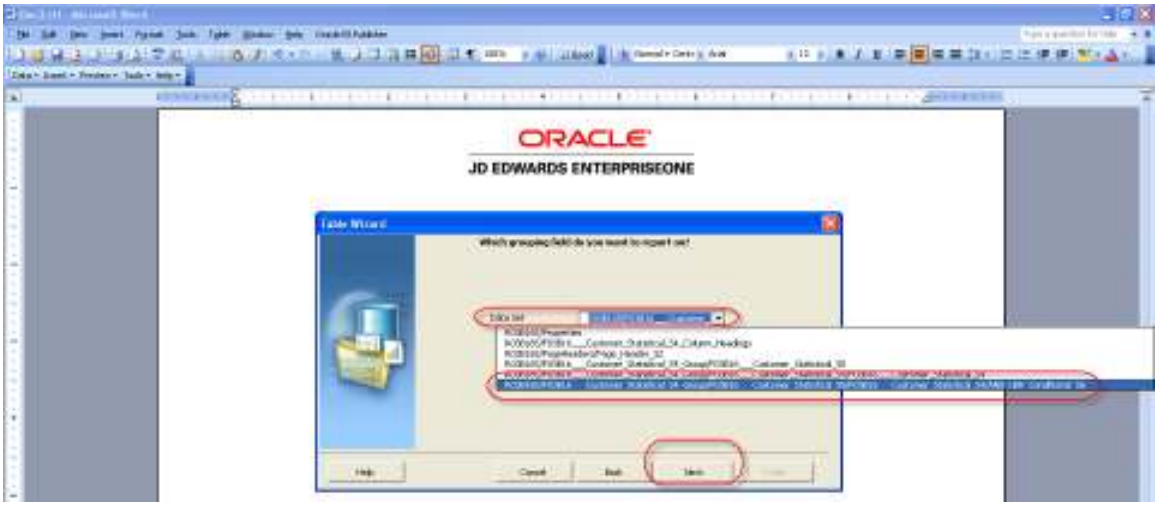
17. Use File Type Drop Down and Select .RTF
18. Name the Document Doc3
19. Click Save

Add Fields from XML Source

20. On the Template Builder Toolbar in MS Word Select Insert / Table Wizard

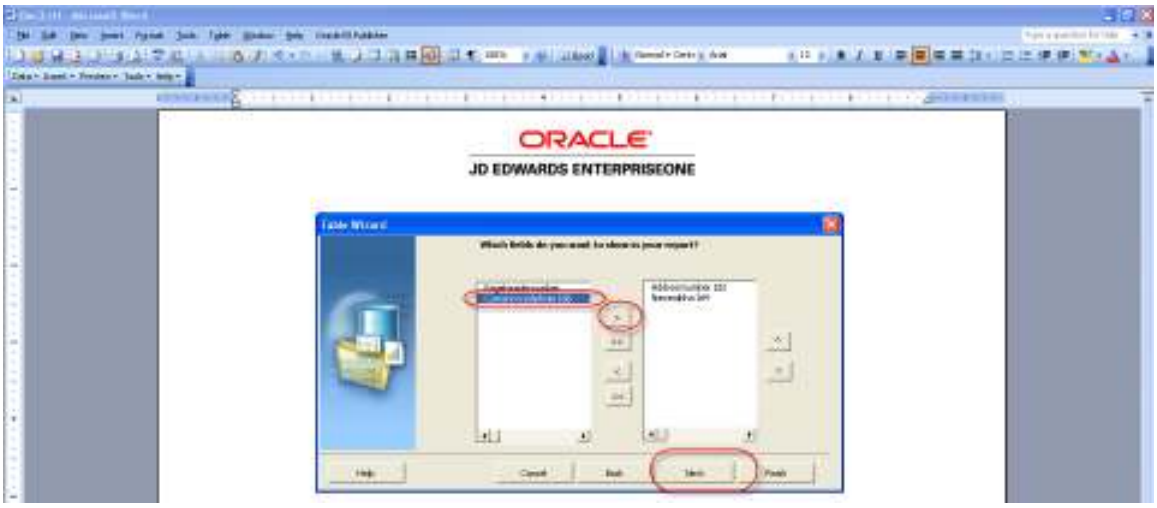
21. Ensure the Table Radio Button is Selected
22. Click Next

23. Use the drop-down for Data Set and select the last line
24. Click Next

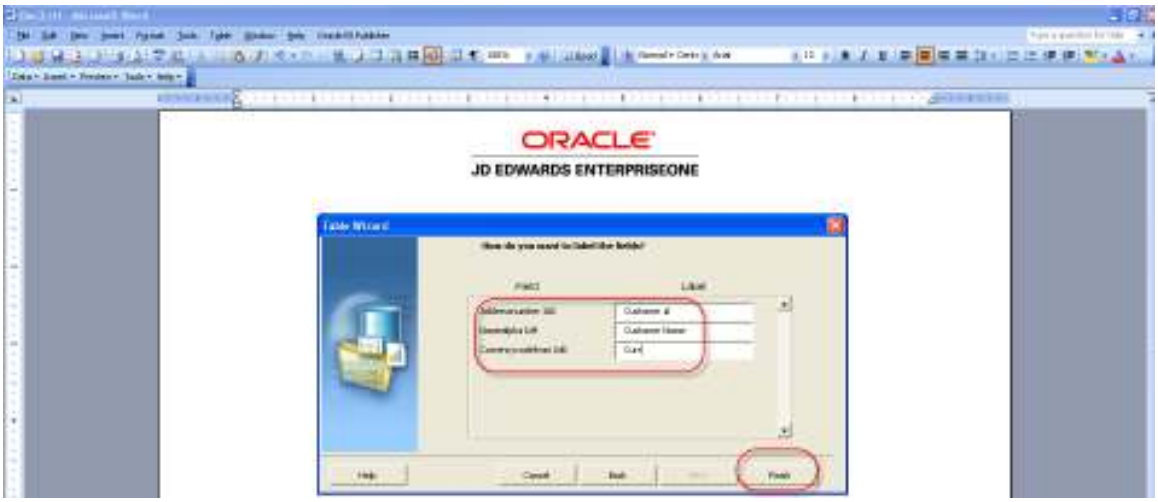


25. Click AddressNumber ID2
26. Click Right Arrow
27. Click NameAlpha ID4
28. Click Right Arrow
29. Click CurrencyCodeFrom ID6

30. Click Right Arrow
31. Click Next



32. Click Next (We aren't going to group any of the fields)
33. Click Next (We aren't going to sort any of the fields)
34. Change the Label for Addressnumber ID2 to Customer #
35. Change the Label for Namealpha ID4 to Customer Name
36. Change the Label for Currencycodefrom ID6 to Curr
37. Click Finish



38. Click Save
39. On the Template Builder Toolbar Click Preview / PDF

40. This is what your PDF report should look like to this point

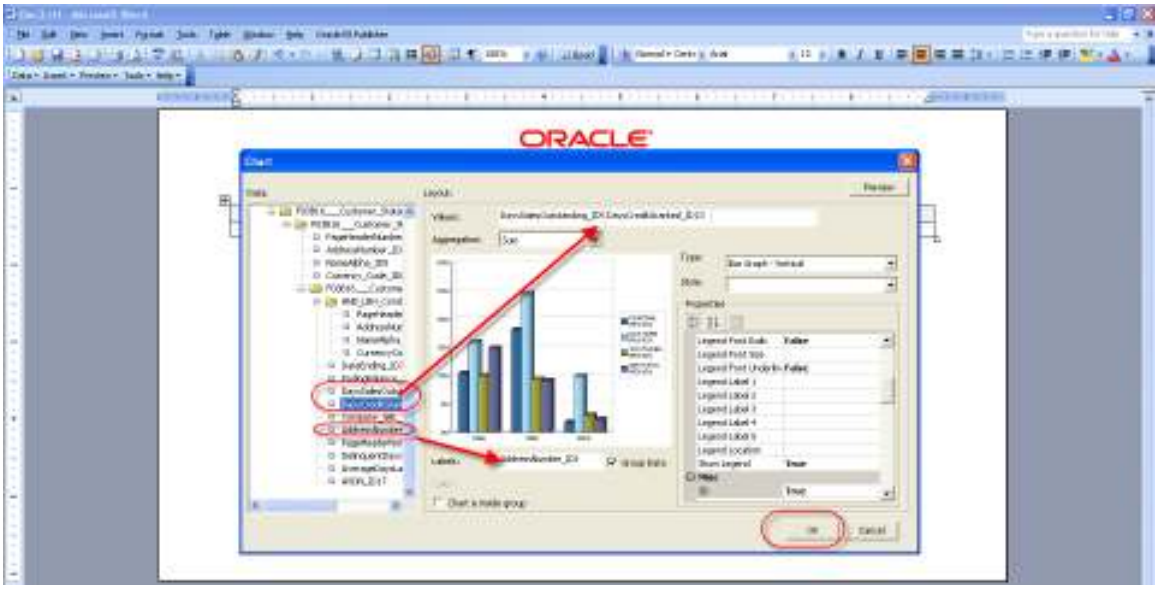
41. Close the PDF window

Add Chart to Template

42. From the Template Builder toolbar click Insert / Chart

43. Scroll to the bottom of the left Data pane

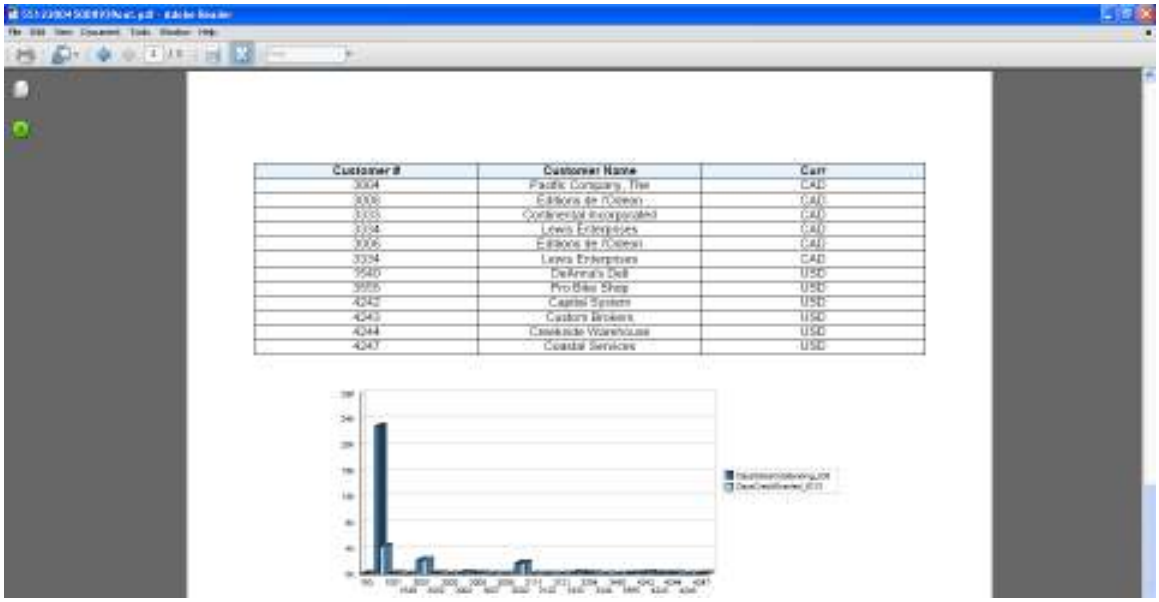
44. Click and Drag Addressnumber from left pane to into the Labels Area
45. Click and Drag DaysSalesOutstanding from left pane into the Values Area
46. Click and Drag DaysCreditGranted from the left pane into the 2nd Values Area
47. Click OK



48. Make the graph bigger by dragging the corners of the graph picture toward the outside of the page

49. Click Save
50. Click Preview / PDF

51. This is what the last page of the PDF should look like now



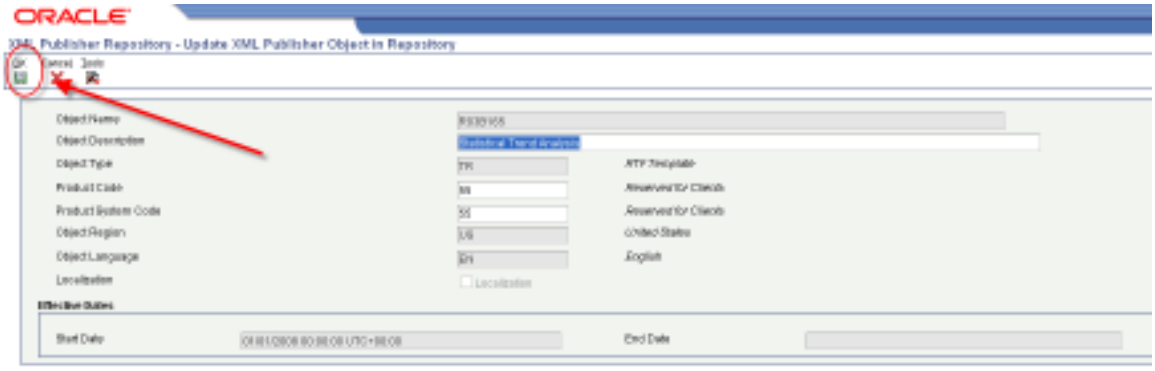
2.5 Upload Template into JD Edwards EnterpriseOne

1. Enter Username and Password
   - Username: JDE
   - Password: JDE

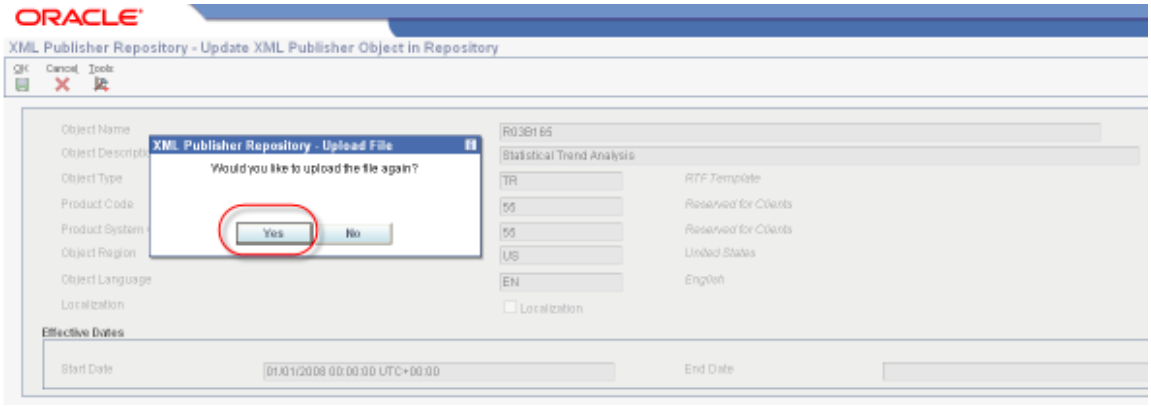
2. Enter GH9120 in Fastpath and Click Double Arrows
3. Click XML Publisher Repository

4. In Grid Row QBE Line enter R*
5. Click Find
6. Click Row Checkbox next to Row for R03B165
7. Click Select

8. Click OK

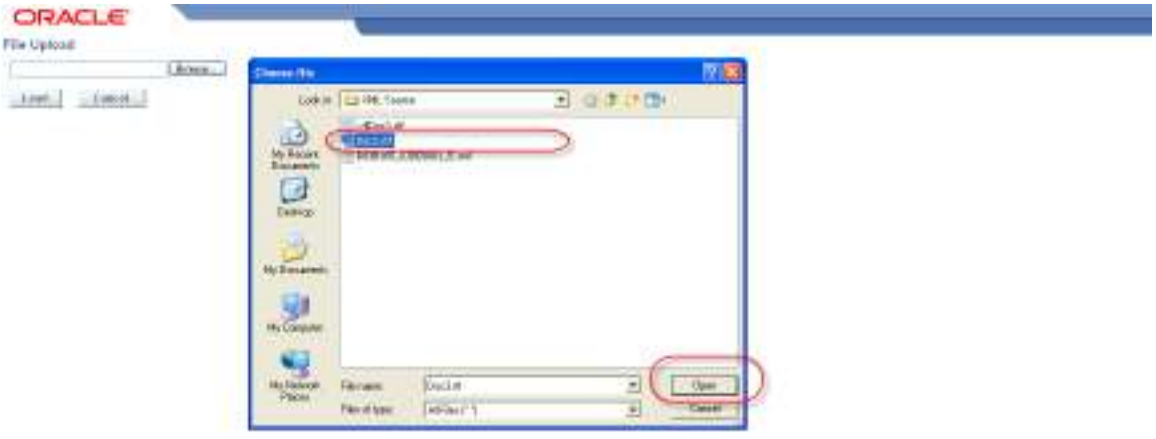


9. When prompted, click Yes to Upload file again



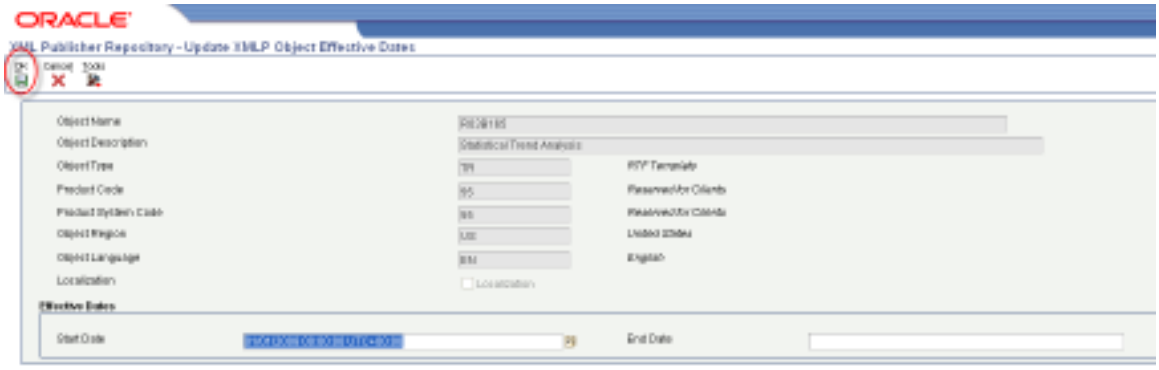
10. Click Browse

11. Find the .RTF you created and saved to your desktop
12. Highlight the .RTF and click Open

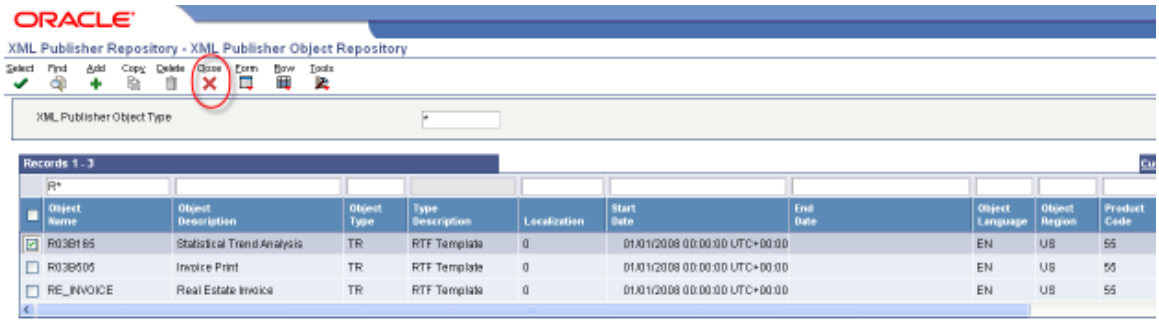


13. Click Load

14. Click OK



15. Click Close

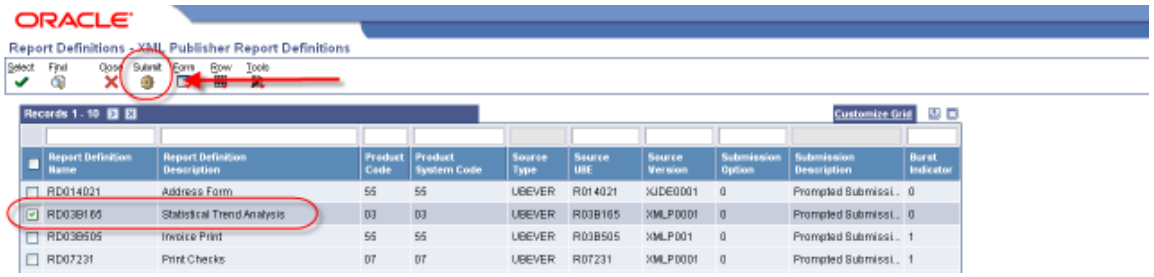


Generate XML Output in EnterpriseOne

16. Enter GH9111 in Fastpath and Click Double Arrows

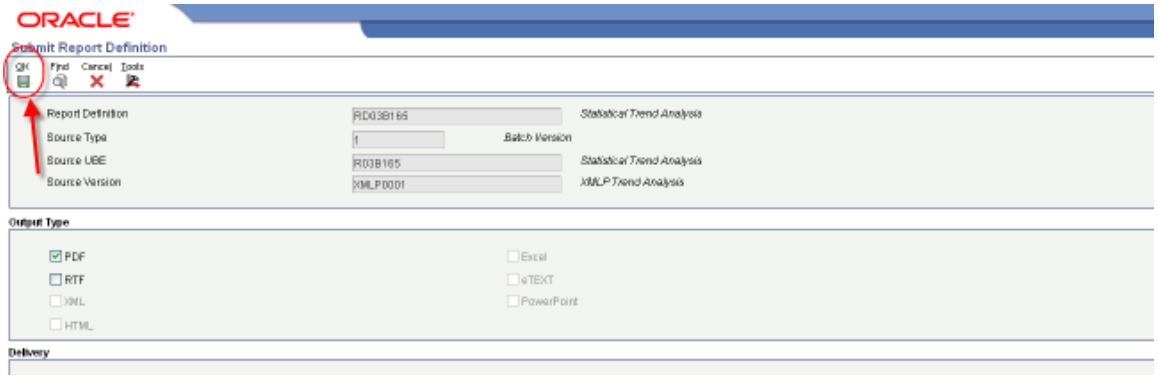
17. On the left hand menu click Report Definitions

18. Click the Checkbox for Grid Row Report Definition Name RD03B165
19. Click Submit



20. Click Submit

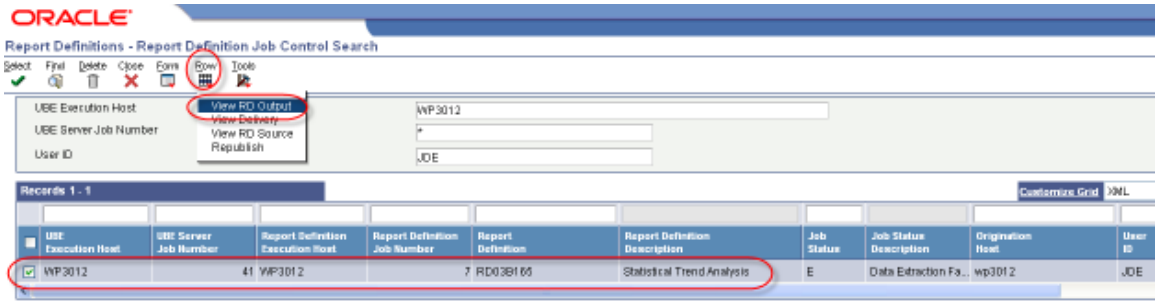
21. Click OK



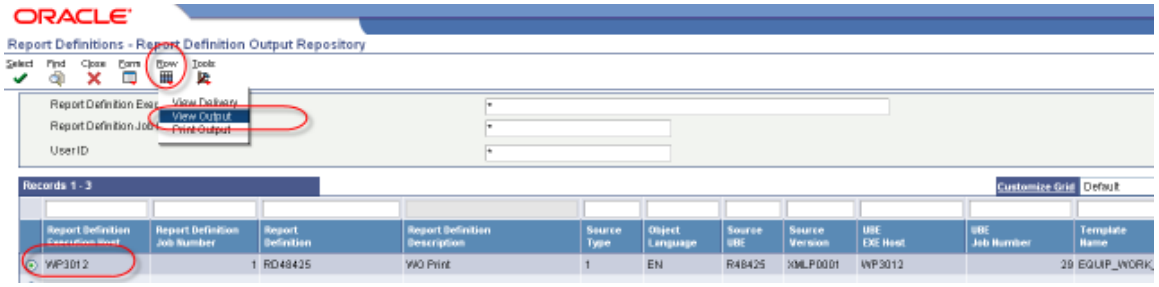
Preview XML Template Output

22. Click Form / Submitted RD Jobs

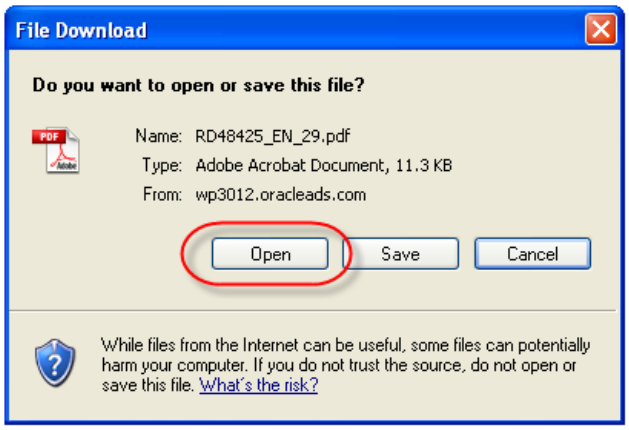
23. Click any Grid Row Checkbox
24. Click Row / View RD Output



25. Click Row / View Output

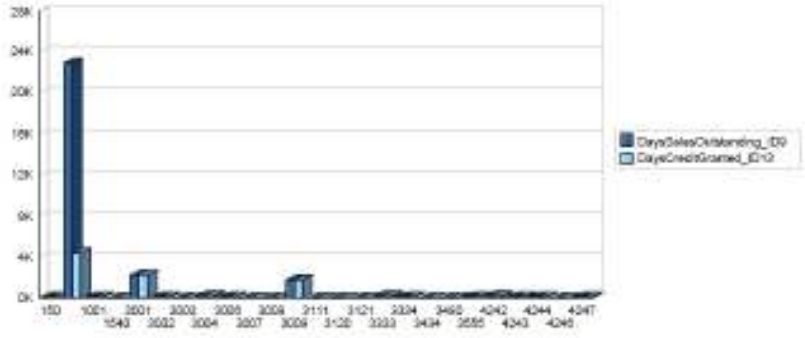


26. When Prompted, Click Open to Open PDF



27. This is what the last page of your .PDF Output should look like

Customer #	Customer Name	Curr
3004	Pacific Company, The	CAD
3006	Editions de l'Odeon	CAD
3333	Continental Incorporated	CAD
3334	Lewis Enterprises	CAD
3006	Editions de l'Odeon	CAD
3334	Lewis Enterprises	CAD
1540	DeAnna's Deli	USD
3555	Pro Bike Shop	USD
4242	Capital System	USD
4243	Custom Brokers	USD
4244	Creekside Warehouse	USD
4247	Coastal Services	USD



52.
53.