

# Creating First Oracle Business Intelligence BI Publisher Report

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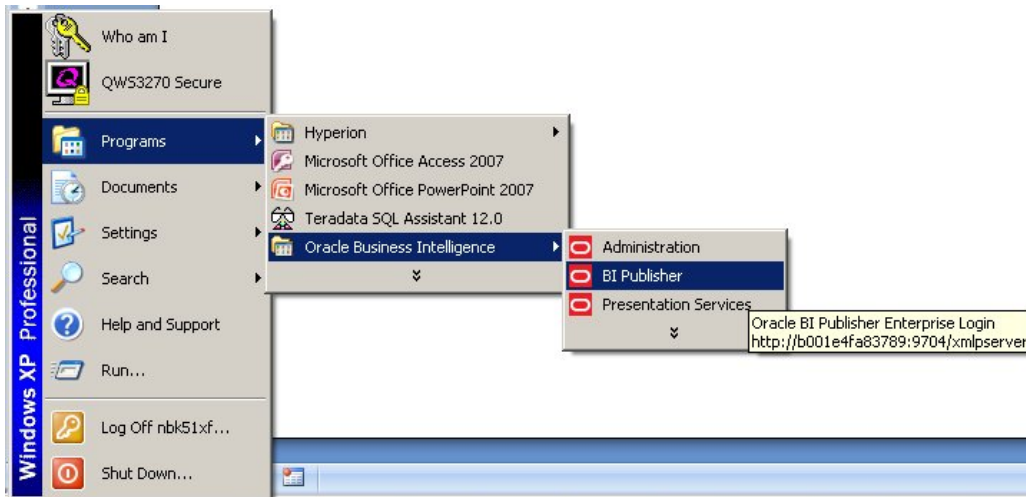
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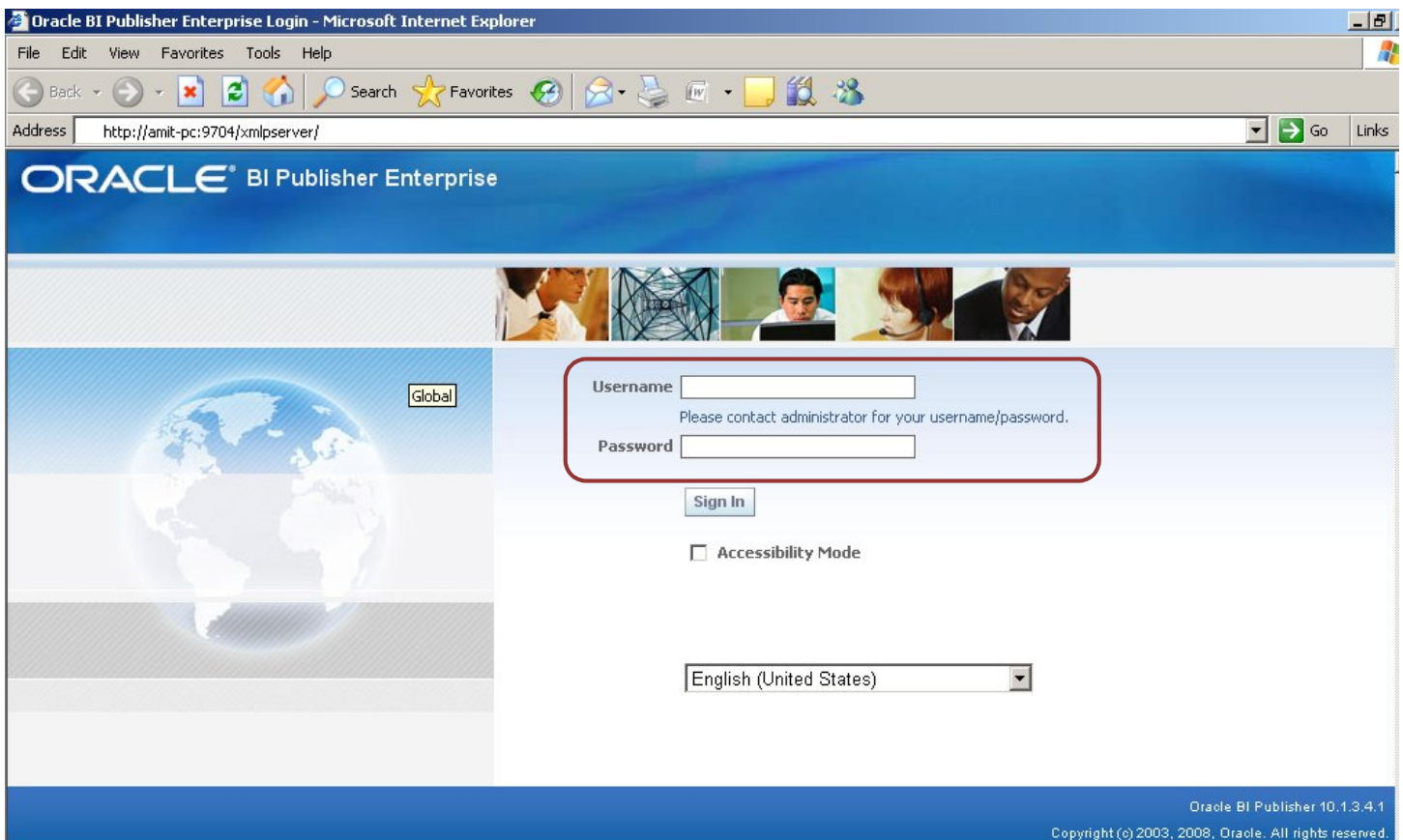
## Creating my first BI Publisher Report

Today let's create our first BI Publisher report. I'm going to demonstrate you the step by step approach to create a first BI Publisher report.

**Step#1:** Open the BI Publisher report as given below.



**Step#2:** Enter the username default is **UserName: Administrator** and password is **"Administrator"**



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**Step#3.** The below screen appears once you login into the BIP report. This consists of *Shared Folders* and *My Folder(Private folder)* . There is a folder named *Users* stores each folder for all the users who have access to BIP.



**Step#4** Now we'll create a new report. Click on *Create a new report* link in *Folder and Report Tasks*



Step#5 : Enter Report Name : Order\_Placed

Folder and Report Tasks

Create a new folder

Create a new report

Enter Report Name

Order\_Placed

Create

Cancel

Upload a report

Step#6 Rename the report with Oder\_Placed to Order\_Placed

Folder and Report Tasks

Create a new folder

Create a new report

Rename this report

Copy this report

Delete this report

Download this report

report

Oder Placed

Date Modified 3/24/10 3:21 PM Calcutta

View

Schedule

History

Edit

Configure

Step#7 Clicked on Edit and modify the BIP report

Reports

Schedules

Admin

Home > Shared Folders > Oder\_Placed

View

Schedule

History

Edit

Conf

Save

Generate XLIFF

Report

New

Delete

Up

Down

Report

Data Model

List of Values

Parameters

Layouts

Bursting

Report Properties

General Settings

Report Name

Oder\_Placed

Description

Default Data Source

Oracle BI EE

Refresh Data Source List

Parameters per line

3

Properties

Run report online

Show Controls

Show Report Links

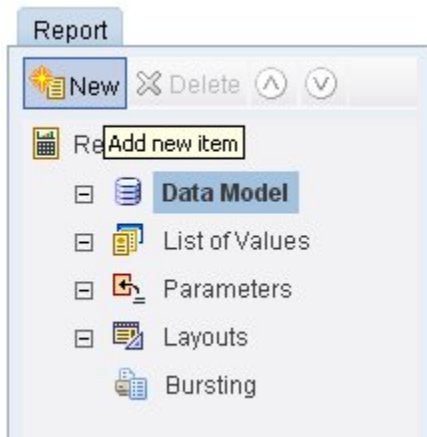
Open Links in New Window

Auto Run

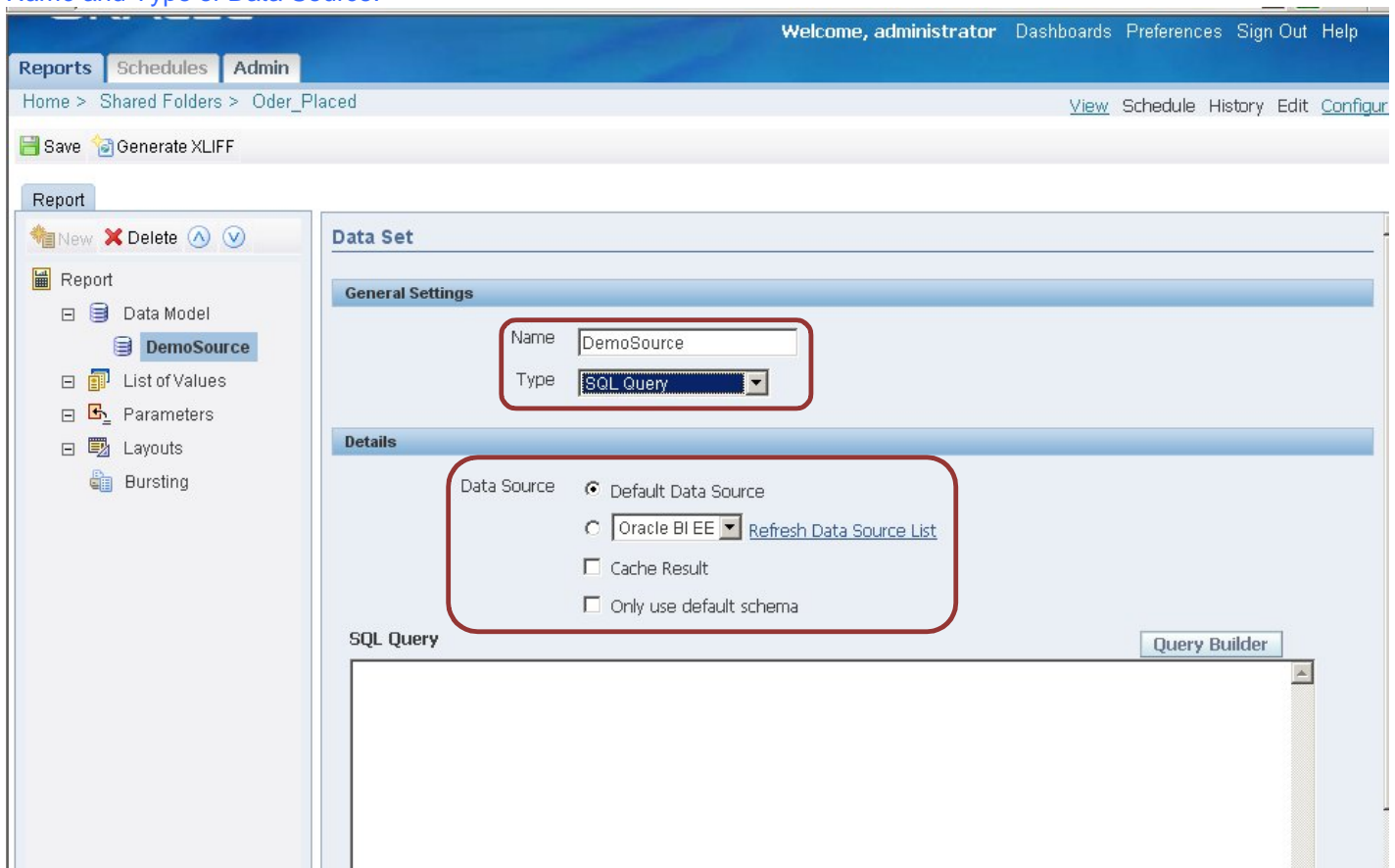
Enable document cache

Disable Client Access from Analyzer for Excel

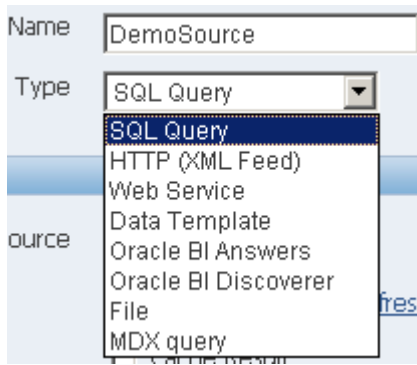
**Step#8** First of all we need to create a *Data Model*. And specify the Data Source.



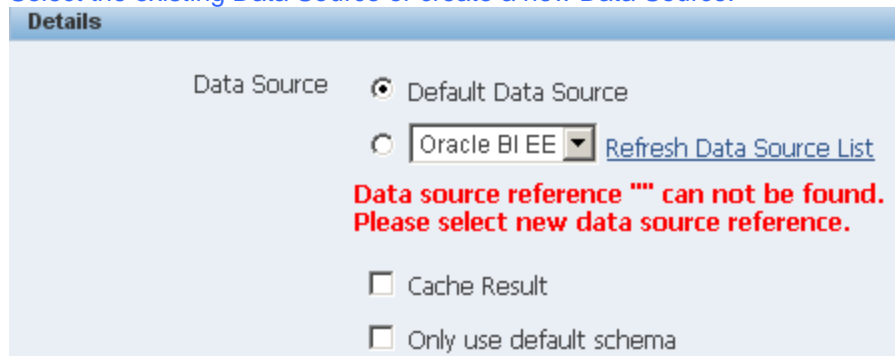
**Step#9** The below screen shows the new Database connection parameters. In *General Setting* tab we need to specify the *Name* and *Type* of Data Source.



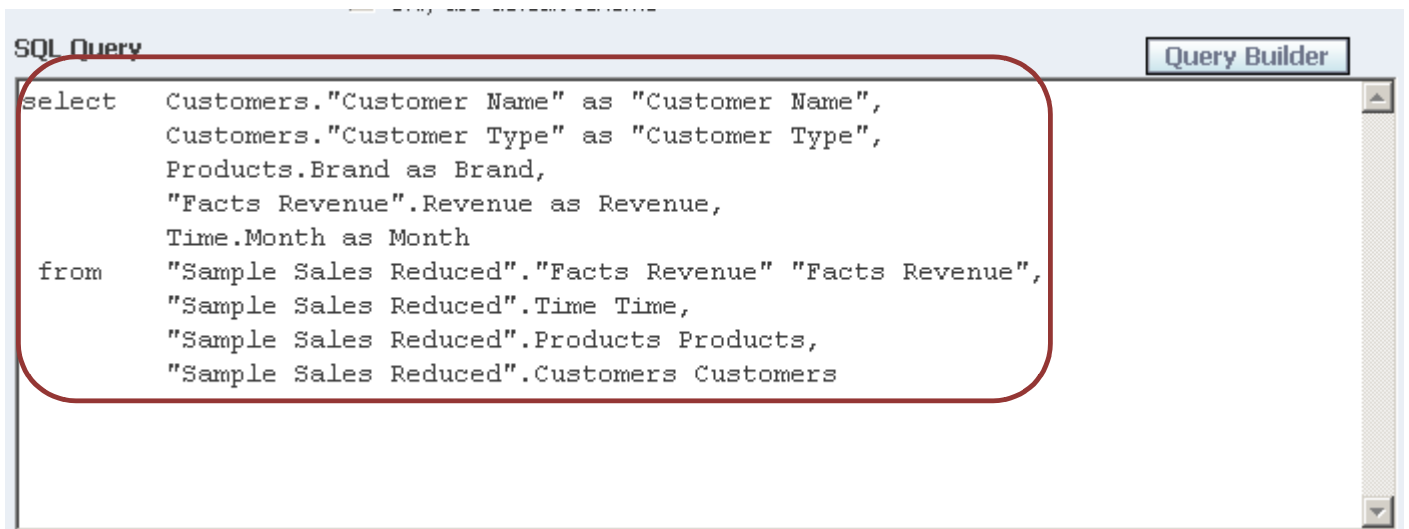
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These are the different data type can be selected



Select the existing Data Source or create a new Data Source.



**Step#10 :** Click on Query Builder to build the query.



**Step#11:** On clicking *Query Builder* you find the Presentation Catalog Presentation Tables and Columns are visible.

Customers

☒ Customer Name

☒ Customer Type

☐ Customer Segment

☐ Customer Credit Rate

☐ First Contact Date

A

A

A

A

31

Products

☐ Product

☐ Product Type

☐ Line Of Business

☒ Brand

A

A

A

A

Time

☐ Day Date

☐ Week

☒ Month

☐ Quarter

☐ Year

31

A

A

A

A

Facts Revenue

☒ Revenue

☐ Month Ago Revenue

☐ Quarter Ago Revenue

☐ Year Ago Revenue

☐ Rolling 3 Months total Revenue

☐ Quarter to Date Revenue

☐ Year to Date Revenue

☐ Year Ago YTD

ORACLE® Answers

Sample Sales Reduced

Columns

Time

Customers

Products

Other Dimensions

Facts Revenue

Facts Other

Filters

This folder is empty.

Refresh Display

Reload Server Metadata

Query Builder - Microsoft Internet

Catalog

Sample Sales...

Schema

Search

Customers

Facts Other

Facts Revenue

Other Dimensions

Products

Time

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**Step#12** : Now the report generates the output in XML format, we need to map the XML data with some Template format as per business need.

The screenshot shows the Oracle BI Publisher Enterprise interface. The top navigation bar includes 'Reports', 'Schedules', and 'Admin'. The breadcrumb trail is 'Home > Shared Folders > Oder\_Placed'. A 'View' button is highlighted in a red box. Below the navigation bar, there are buttons for 'Template', 'Data', 'View', 'Export', 'Send', 'Schedule', 'Analyzer', and 'Analyzer for Excel'. The main content area displays XML data in a code editor. The XML structure is as follows:

```
<?xml version="1.0" encoding="UTF-8" ?>
<ROWSET>
  <ROW>
    <Customer_Name>Abhishek Arya</Customer_Name>
    <Customer_Type>Type 1</Customer_Type>
    <Brand>Brand 1</Brand>
    <Revenue>9282.789999999999</Revenue>
    <Month>2007 / 03</Month>
  </ROW>
  <ROW>
    <Customer_Name>Abhishek Arya</Customer_Name>
    <Customer_Type>Type 1</Customer_Type>
    <Brand>Brand 1</Brand>
    <Revenue>3881.98</Revenue>
    <Month>2007 / 08</Month>
  </ROW>
  <ROW>
    <Customer_Name>Abhishek Arya</Customer_Name>
    <Customer_Type>Type 1</Customer_Type>
    <Brand>Brand 1</Brand>
    <Revenue>4764.0</Revenue>
    <Month>2007 / 12</Month>
  </ROW>
  <ROW>
    <Customer_Name>Abhishek Arya</Customer_Name>
    <Customer_Type>Type 1</Customer_Type>
    <Brand>Brand 1</Brand>
  </ROW>
</ROWSET>
```

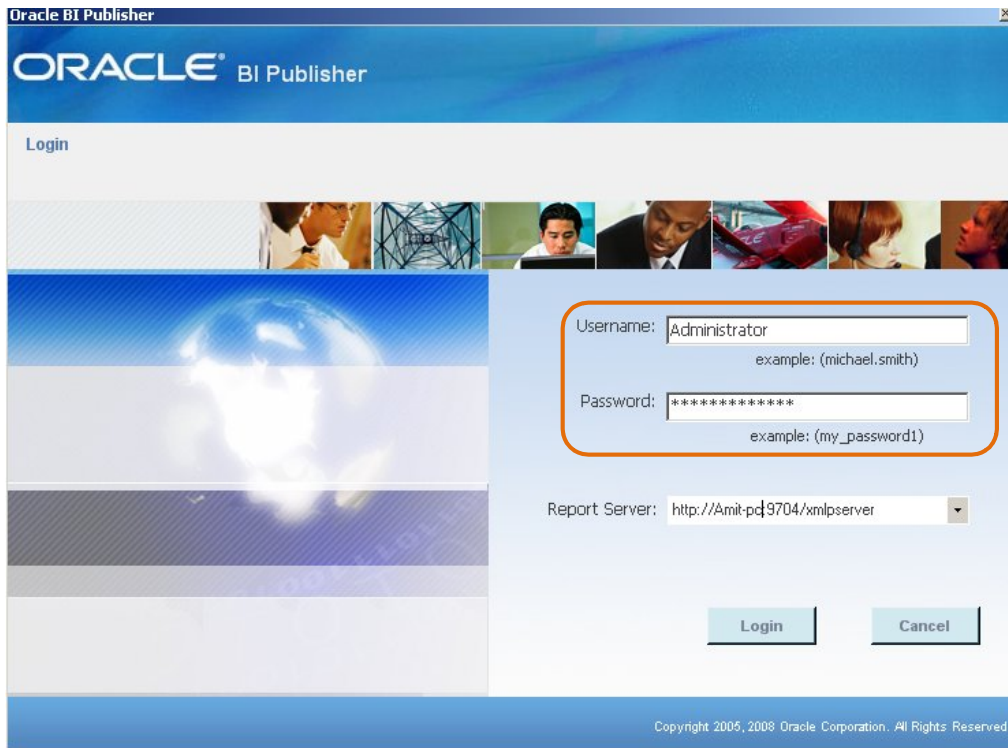
A callout bubble points to the first row of data, stating: "Data is available in XML format. i.e Customer\_Name tag".

**Step#13** Now lets display data in Tabular format.

- First we need to export this XML data as a sample data to upload in MS Word Template. Open word and select *Oracle BI Publisher*. Click *LogOn*.

The screenshot shows the Microsoft Word interface with the 'Hyperion' add-in installed. The 'Hyperion' menu is open, showing options: 'Hyperion', 'Oracle BI Publisher', and 'Insert Confidential Header and Footer'. The 'Oracle BI Publisher' option is highlighted. The 'Hyperion' menu is circled in red. The 'Add-Ins' tab is selected in the ribbon, and the 'Hyperion' add-in is visible in the 'Custom Toolbars' section.

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**Step#14** : Specify the Username "Administrator" and Password: "Administrator".



The image shows the Oracle BI Publisher login window. The title bar says "Oracle BI Publisher". The main header has the "ORACLE BI Publisher" logo. Below the header is a "Login" section. On the left, there is a large graphic of a globe. On the right, there are input fields for "Username" and "Password", and a "Report Server" dropdown menu. The "Username" field contains "Administrator" and the "Password" field contains "\*\*\*\*\*". Below these fields are "Login" and "Cancel" buttons. At the bottom, there is a copyright notice: "Copyright 2005, 2008 Oracle Corporation. All Rights Reserved."

Oracle BI Publisher

ORACLE BI Publisher

Login

Username: Administrator  
example: (michael.smith)

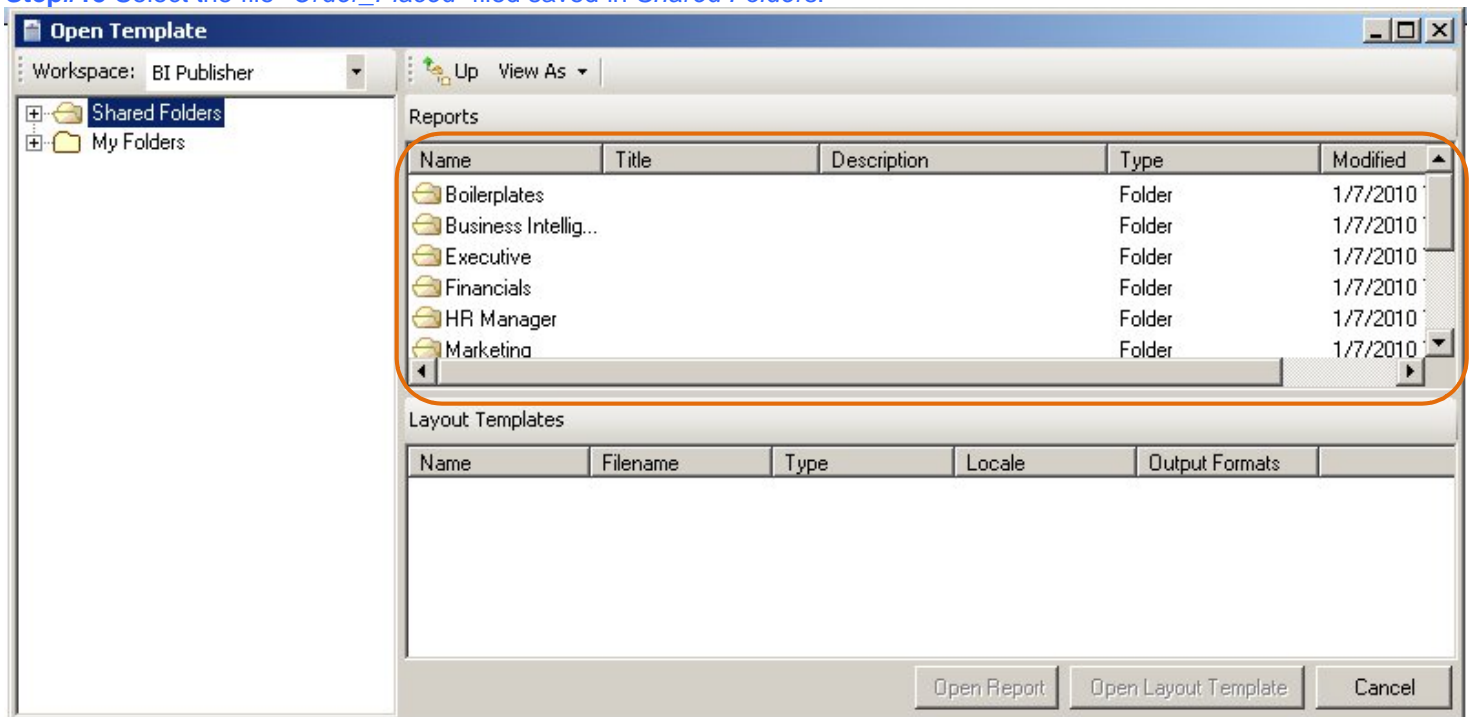
Password: \*\*\*\*\*  
example: (my\_password1)

Report Server: http://Amit-pd9704/xmlpserver

Login Cancel

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**Step#15** Select the file "Order\_Placed" filed saved in Shared Folders.



The image shows the "Open Template" dialog box. The title bar says "Open Template". The "Workspace" is set to "BI Publisher". The "Shared Folders" and "My Folders" are listed on the left. The "Reports" table is highlighted with an orange box. The "Layout Templates" table is empty. At the bottom, there are "Open Report", "Open Layout Template", and "Cancel" buttons.

Open Template

Workspace: BI Publisher

Shared Folders  
My Folders

Up View As

Reports

Name	Title	Description	Type	Modified
Boilerplates			Folder	1/7/2010
Business Intellig...			Folder	1/7/2010
Executive			Folder	1/7/2010
Financials			Folder	1/7/2010
HR Manager			Folder	1/7/2010
Marketing			Folder	1/7/2010

Layout Templates

Name	Filename	Type	Locale	Output Formats
------	----------	------	--------	----------------

Open Report Open Layout Template Cancel

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**Step#16** Export the XML file so that it could be used as Sample Data while generating the Report in MS Word.

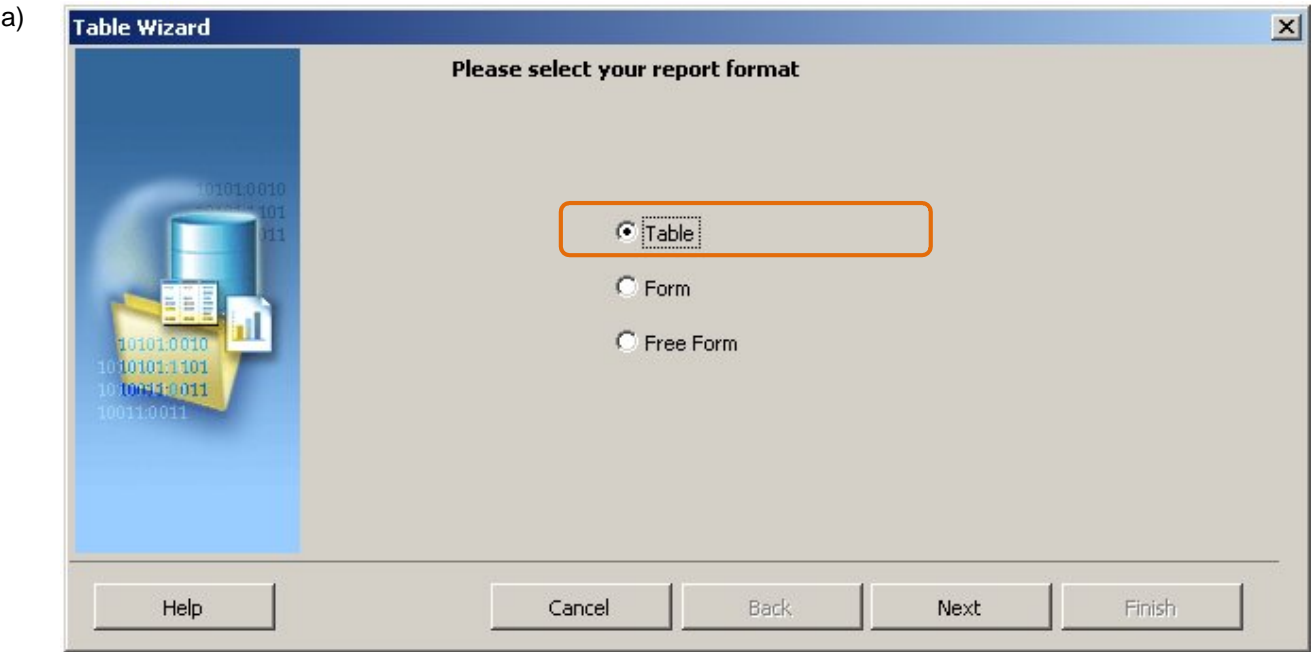
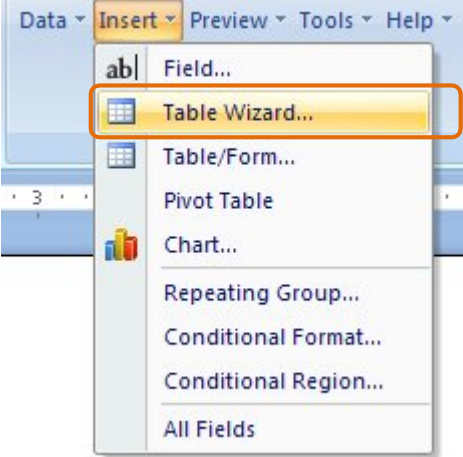
The screenshot shows the Oracle BI Publisher Enterprise web interface. The top navigation bar includes 'Reports', 'Schedules', and 'Admin'. The breadcrumb trail is 'Home > Shared Folders > Oder\_Placed'. The 'Data' dropdown menu is open, showing options like 'Template', 'View', 'Export', 'Send', 'Schedule', 'Analyzer', and 'Analyzer for Excel'. The 'Export' button is highlighted. Below the navigation bar, the XML data is displayed in a preformatted view. A 'File Download' dialog box is open, asking 'Do you want to open or save this file?'. The dialog shows the file name 'Oder\_Placed.xml', type 'XML Document', and source 'b001e4fa83789'. The 'Save' button is highlighted with an orange box. Below the dialog, a security warning states: 'While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)'

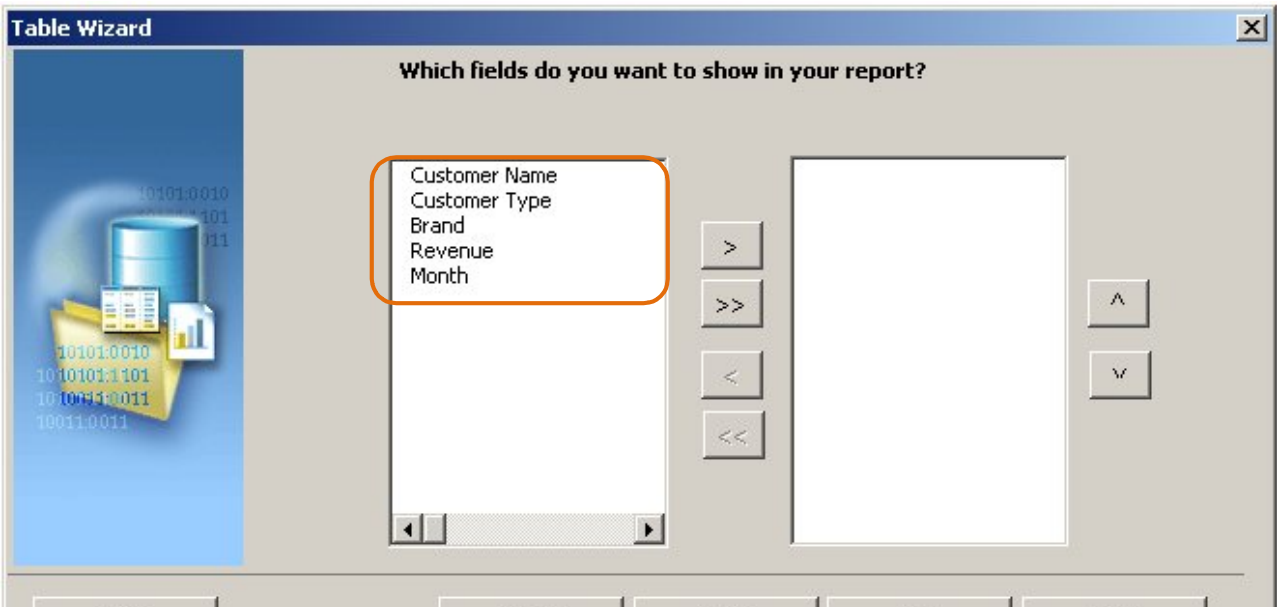
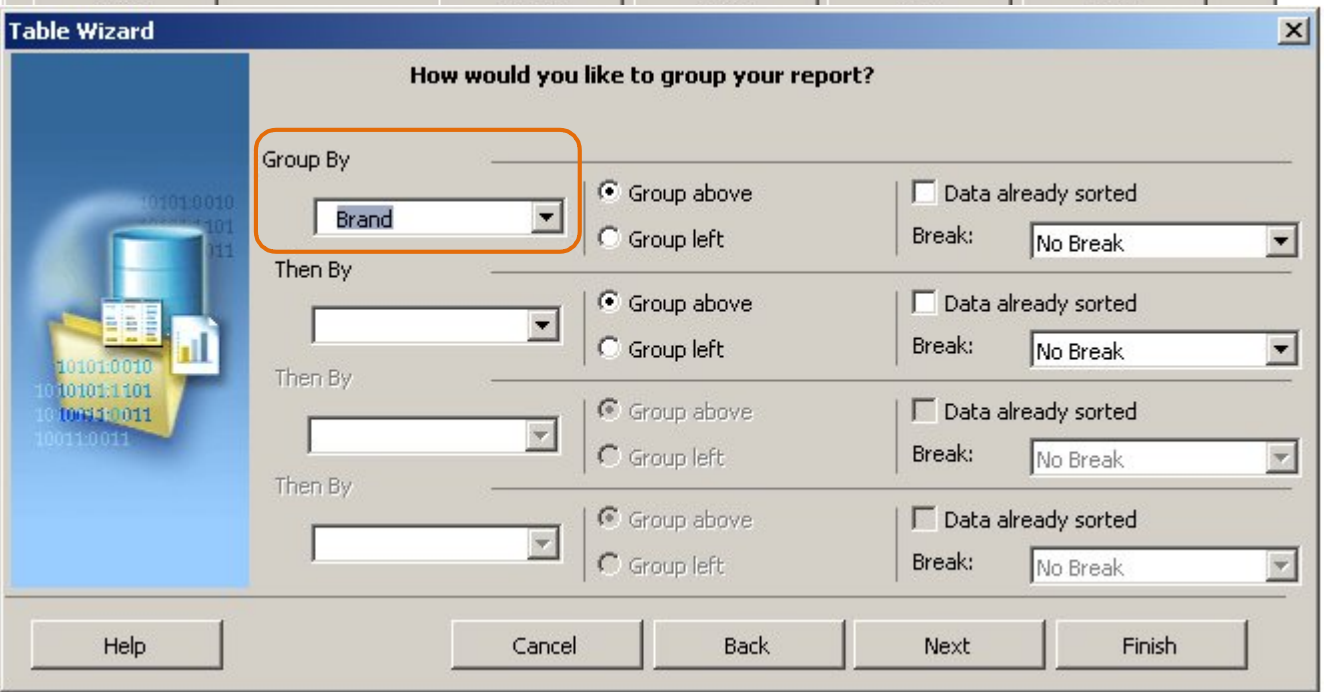
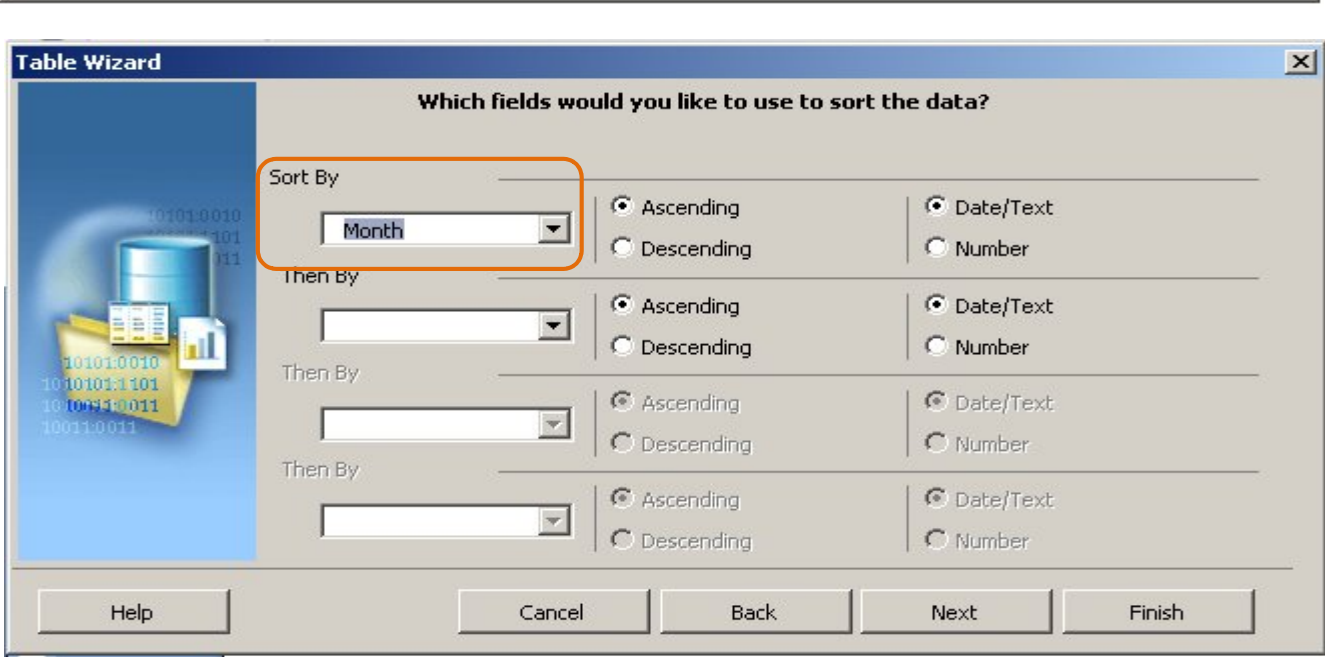
```
<?xml version="1.0" encoding="UTF-8" ?>
- <ROWSET>
- <ROW>
  <Customer_Name>Abhishek Arya</Customer_Name>
  <Customer_Type>Type 1</Customer_Type>
  <Brand>Brand 1</Brand>
  <Revenue>9282.789999999999</Revenue>
  <Month>2007 / 03</Month>
</ROW>
- <ROW>
  <Customer_Name>Abhishek Arya</Customer_Name>
  <Customer_Type>Type 1</Customer_Type>
  <Brand>Brand 1</Brand>
  <Revenue>3881.98</Revenue>
  <Month>2007 / 08</Month>
</ROW>
- <ROW>
  <Customer_Name>Abhishek Arya</Customer_Name>
  <Customer_Type>Type 1</Customer_Type>
  <Brand>Brand 1</Brand>
  <Revenue>4764.0</Revenue>
  ...
```

**Step17** The XML file we saved in previous step.

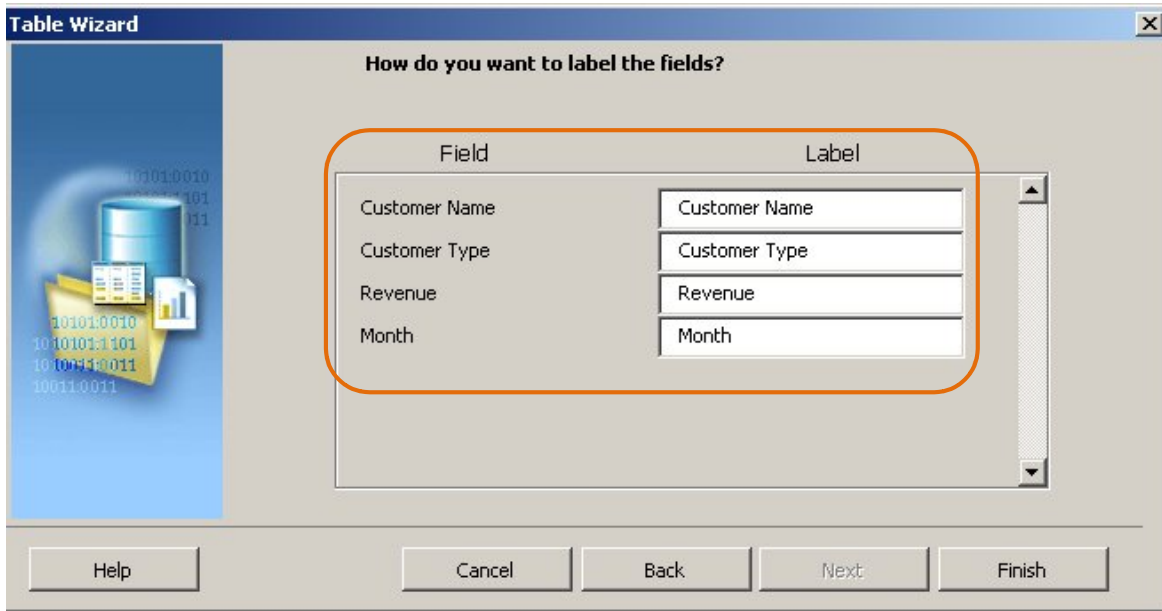
The screenshot shows the Microsoft Word interface with the 'Hyperion' add-in installed. The 'Data' dropdown menu is open, showing options like 'Load XML Data...' and 'Load XML Schema...'. The 'Load XML Data...' option is highlighted with an orange box. The 'Hyperion' add-in is visible in the top right corner of the ribbon.

**Step#18** Now we can display report in tabular format or any predefined Template format given by your client.  
a) Displaying report in Tabular format by using Table Wizard.



- c)  The 'Table Wizard' dialog box is shown with the title 'Which fields do you want to show in your report?'. On the left is a decorative graphic with binary code and database icons. The main area contains two lists. The left list, which is highlighted with an orange box, contains 'Customer Name', 'Customer Type', 'Brand', 'Revenue', and 'Month'. To the right of this list are four arrow buttons: '>', '>>', '<', and '<<'. Further right is an empty list box, and to its right are two arrow buttons: '^' and 'v'.
- d)  The 'Table Wizard' dialog box is shown with the title 'How would you like to group your report?'. On the left is the same decorative graphic. The main area has four rows for grouping. The first row is highlighted with an orange box. Each row has a 'Group By' dropdown (the first one shows 'Brand'), a radio button for 'Group above' (which is selected) or 'Group left', a 'Data already sorted' checkbox, and a 'Break:' dropdown (all show 'No Break'). At the bottom are buttons for 'Help', 'Cancel', 'Back', 'Next', and 'Finish'.
- e)  The 'Table Wizard' dialog box is shown with the title 'Which fields would you like to use to sort the data?'. On the left is the same decorative graphic. The main area has four rows for sorting. The first row is highlighted with an orange box. Each row has a 'Sort By' dropdown (the first one shows 'Month'), two radio buttons for 'Ascending' (selected) or 'Descending', and two radio buttons for 'Date/Text' (selected) or 'Number'. At the bottom are buttons for 'Help', 'Cancel', 'Back', 'Next', and 'Finish'.

f)



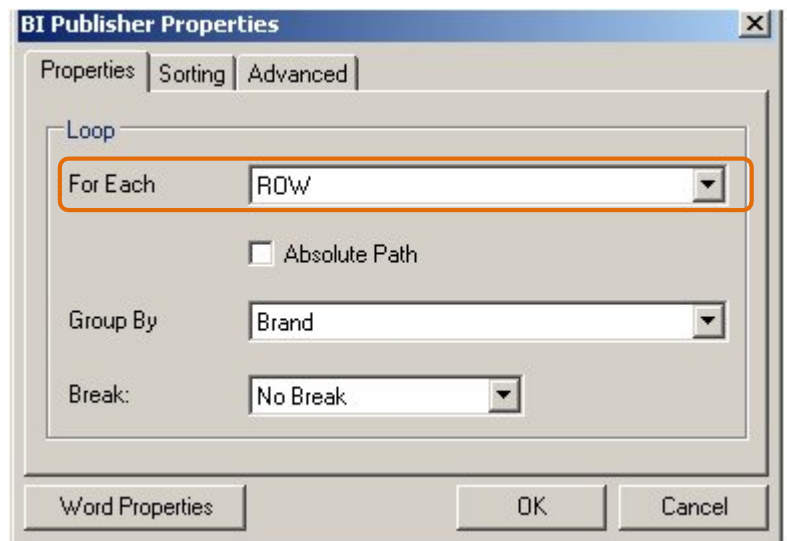
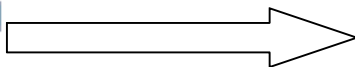
group ROW by Brand

<b>Brand</b>			
Customer Name	Customer Type	Revenue	Month
F Customer_Name	Customer_Type	Revenue	Month E

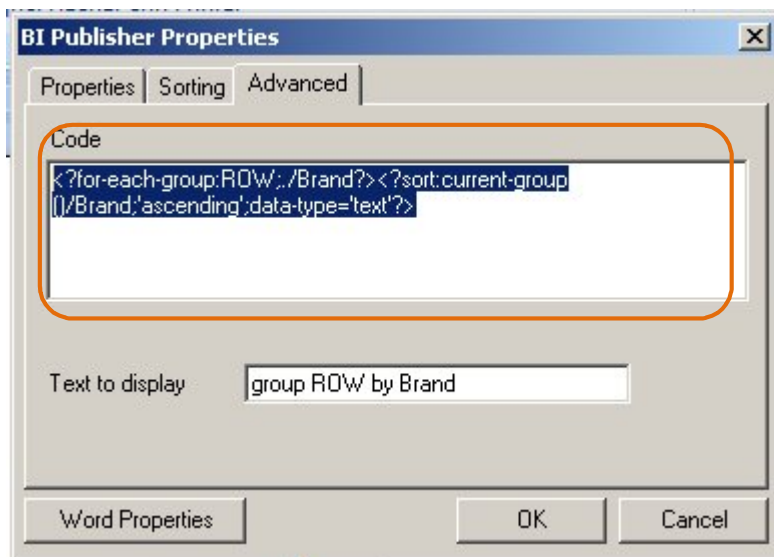
end ROW by Brand

**Step#19** Now on clicking on any tag shaded with gray color you find the definition of the tab.

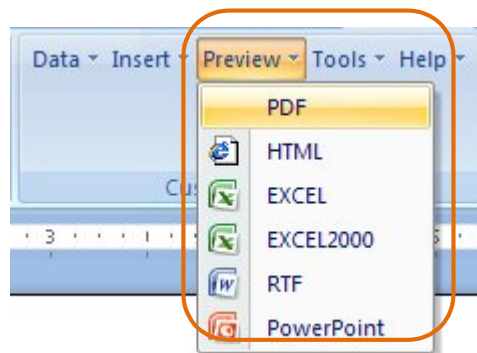
group ROW by Brand



<?for-each-group:ROW;./Brand?>  
<?sort:current-group()/Brand;'ascending';data-type='text'?>



**Step 20** : Save the file with .rtf extension and then preview the output in any given format.



331269428857353out.pdf - Adobe Reader

File Edit View Document Tools Window Help

1 / 72

103%

Find

?

Brand 1

Customer Name	Customer Type	Revenue	Month
Ann Reston	Type 2	5598.24	2007 / 01
Cathy Sanders	Type 1	7726.95	2007 / 01
David Khodak	Type 2	2797.66	2007 / 01
David Sunder	Type 2	3894.18000000000003	2007 / 01
Deborah Krant	Type 3	2390.06	2007 / 01
Ethan Pappayliou	Type 2	7062.07	2007 / 01

**Step 22 :** Now display the report in predefine format.

SeighMen Monthly Sales Report

Brand :

Month:

Customer Type:

Customer Name	Revenue Received

DataInsertPreviewToolsHelp

ab|Field...

Table Wizard...

Table/Form...

Pivot Table

Chart...

Repeating Group...

Conditional Format...

Conditional Region...

All Fields

Field

FindFind Next

Rowset

Row

Customer Name

Customer Type

Brand

Revenue

Month

Example

Calculation


On Grouping

Force LTR Direction

Insert

Close

Help



### SeighMen Monthly Sales Report

Brand : Brand

Month: Month

Customer Type: Customer\_Type

Customer Name	Revenue Received
Customer_Name	Revenue

Field

Find  Find Next

Rowset

Row

- Customer Name
- Customer Type
- Brand
- Revenue
- Month

Example Abhishek Arya


Calculation  ☐ On Grouping

☐ Force LTR Direction

Insert Close Help

Please select a node in the tree.

**Step 24** Now save the template and review the report.



### SeighMen Monthly Sales Report

Brand : Brand 1

Month: 2007 / 03

Customer Type: Type 1

Customer Name	Revenue Received
Abhishek Arya	9282.789999999999