

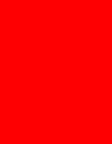


ORACLE®



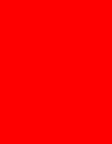
ORACLE®

The Reporting Platform for Oracle Applications: BI Publisher



The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.



Who is here today?

How Many.....

- Siebel
- JD Edwards (World or EnterpriseOne)
- Peoplesoft
- E-Business Suite

Program **Agenda**

- Why BI Publisher?
- Let's build a template
- How can I use it with my application:
 - JD Edwards Enterprise
 - JD Edwards World
 - PeopleSoft
 - E-Business Suite
 - Siebel CRM
- Questions & Answers



BI Publisher Documents

- ✓ Purchase Orders
- ✓ Labels / Bar Codes
- ✓ Collateral
- ✓ Government Forms
- ✓ eText
- ✓ Order Forms
- ✓ Invoices
- ✓ Operational Reports
- ✓ Correspondence
- ✓ Financial Statements
- ✓ Checks

URS
Washington Division

ORACLE
Vision Operations (USA)

AT&T Universal Card
5645 Main Street
Jacksonville
FL
32209

October 31, 2005

Acme Manufacturing
20015 Sample Project

Period Ending Date: 28-Dec-2007

Eaton Brazil for Eaton Worldw
Customer Profile

ORACLE General Ledger
Vision Operations (USA)

Posted Journals
From 01-JAN-99 to 31-JAN-99

Report Date: 8/31/2004
Page 8 of 50

Currency	USD						
Balance Type	Actual						
Source: Intercompany							
Batch: CENTRA: Operations Intercompany 342981: A:4554							
Posted Date: 30-SEP-99							
Journal: CENTRA: CT00000069 Intercompany Transfer USD							
Category: Intercompany Transfer							
Effective Date: 31-JAN-99							
Line	Account	Transaction Date	Description	Line Item	Debit	Credit	Unit
1	01-404-7565-0000-000	31-JAN-99	Journal Import Created	CT00000069	3,000.00		0.00
2	01-404-7753-0000-000	31-JAN-99	Journal Import Created	CT00000069		3,000.00	0.00
Journal Total					3,000.00	3,000.00	0.00

Journal: CENTRA: CT00000070 Intercompany Transfer USD

Category: Intercompany Transfer

Effective Date: 31-JAN-99

Line	Account
1	01-000-1410-000
2	01-000-1813-000
3	01-402-4153-000
4	01-402-5110-000

Journal: CENTRA: CT00000070 Intercompany Transfer USD

Category: Intercompany Transfer

Effective Date: 31-JAN-99

Line	Account
1	01-000-1410-000
2	01-000-1814-000
3	01-000-2680-000
4	01-430-4164-000
6	01-430-5110-000

Journal: CENTRA: CT00000070 Intercompany Transfer USD

Category: Intercompany Transfer

Effective Date: 31-JAN-99

Line	Account
1	01-000-1410-000
2	01-000-1814-000

with E applic
Improv
with h
quality
suppo
busine

7/23/2003 Pa

Oracle Corporation
500 Oracle Parkway
Redwood Shores, CA 94404

Date: 11/22/2004

Pay to the order of Vision Corporation **\$ 2,100.00**

Two thousand one hundred and zero cents*****

Anonymous Bank
Aaa Street
New York, NY 10000

Memo *Laurence Ellison* MP

⑆ 12340432 ⑆ 3726 1789930 ⑆ 7676

TAPC HQ 132 Fairgrounds Road

I APC-US331 00000002573EUR094476

I APC-US332 00000004000EUR094477

Z 000000000019573094480

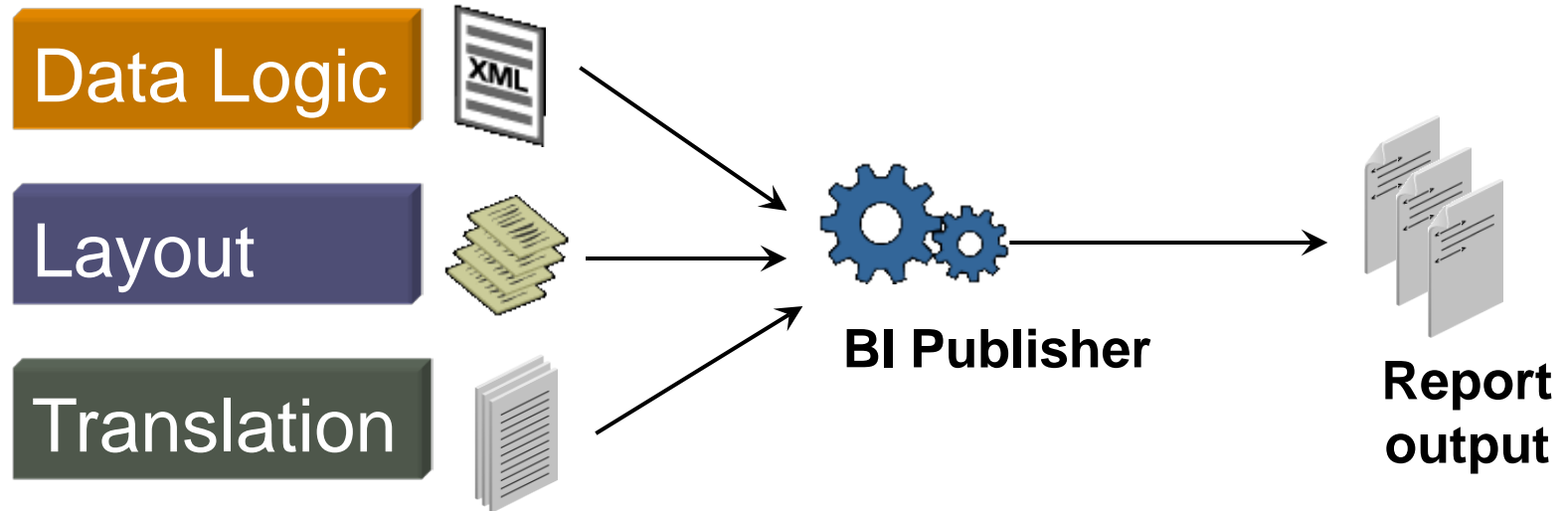
Why BI Publisher?



Why BI Publisher?

Simplified Report Maintenance

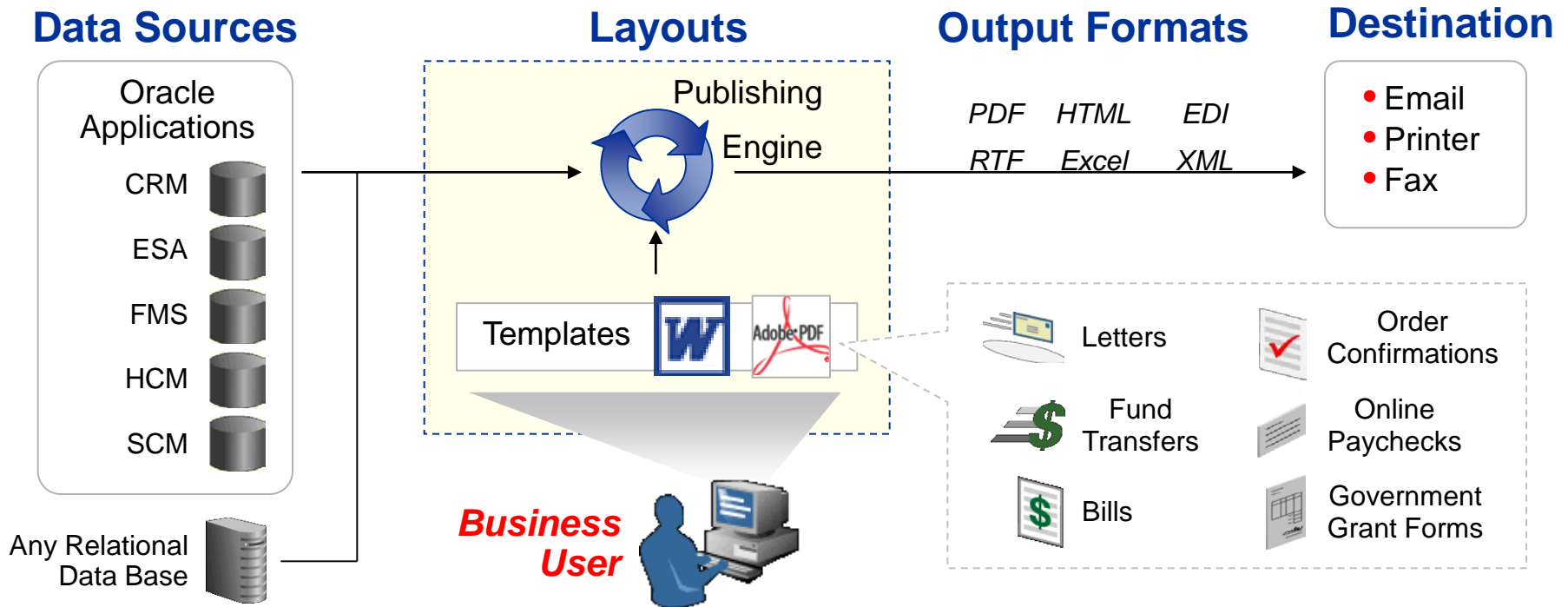
Separate query, layout, and translation



- ✓ Flexibility
- ✓ Reduced maintenance

Why BI Publisher?

Oracle Standard Enterprise Reporting Platform



Integrated Out-of-the-Box with All Oracle Applications

BI Publisher in Oracle Applications

Limited Use License

- Oracle E-Business Suite

In 11i -- 500 templates

In R12.1 -- ALL reports are BI Publisher: 2724 templates and 2092 data sources or data templates across 95 products

Oracle Reports to Publisher Conversion Assistant

- PeopleSoft

Integrated into 8.48

Products shipping content in R9

- Financials
- HCM
- SCM
- Grants
- CRM
- Student Admin

- Siebel CRM

Integrated in 8.1.1 119 reports OOTB

Actuate to Publisher Conversion Assistant

BI Publisher in Oracle Applications

Limited Use License

- J.D. Edwards Enterprise One
 - Integrated into 8.96
 - Allow customers to develop their own templates
 - Subsequent releases will add Apps content
 - JD Edwards EnterpriseOne JDBC driver
- J.D. Edwards World
 - Integrated in A9.1
 - Produce XML that can be used as input to BI Publisher
 - Automated integration in newly released A9.2
 - JD Edwards World JDBC Driver
 - Customizable templates

BI Publisher in Many Oracle Products

Oracle Fusion Middleware MapViewer
Oracle Enterprise Taxation Management
Oracle Identity Management
Oracle Life Sciences AERS
Oracle Life Sciences Data Hub
Oracle FLEXCUBE Universal Banking
i-Flex FLEXCUBE Retail
Oracle FLEXCUBE Direct Banking
Oracle Reveleus
Oracle Mantas
Agile Product Lifecycle Management for Process
Agile Product Lifecycle Management
Oracle Hyperion Planning
Oracle Hyperion Financial Management
Oracle Business Process Management
Oracle Business Event Analysis and Monitoring
LGBU

Oracle Primavera P6 Enterprise Project Portfolio Management
Oracle Pedigree and Serialization Manager
Network Management System Utilities
Oracle Application Testing Suite
Oracle SOA Governance
Oracle Retail
Oracle Governance, Risk & Compliance
iFlex FLEXCUBE – IFLEX Reinsurance
Oracle FLEXCUBE Lending and Leasing
Oracle Communications Applications
Oracle Transportation Management
Oracle Insurance Insbridge Rating and Underwriting
Oracle Application Express (APEX)
Enterprise Manager - Configuration Change Console
Oracle Business Transaction Monitoring
Siebel Branch Teller
Oracle Policy Automation

Enhanced Reporting Solution

Integration with BI Publisher – Key Benefits

- **BI Publisher Development**
 - Easier to develop and deploy
 - Save money / time on development and maintenance
- **Richer Functionality**
 - End users can create their own layouts
 - End user chooses output format (PDF, RTF, Excel, HTML, MHTML)
 - Report against multiple data sources
- **Oracle's strategic enterprise reporting tool**
 - Based on industry standards (XLIFF, XML)
- **Improved Support**
 - Single vendor
- **Reduced TCO**
 - Development, deployment, administration, upgrade

Let's Build a **Template**



Report Layout Design Performed in Common Document Design Tools



```

- <ROWSET>
- <ROW>
  <INDUSTRY_ID>441</INDUSTRY_ID>
  <INDUSTRY>Motor vehicle & parts</INDUSTRY>
  <YEAR>2007</YEAR>
  <MONTH>March</MONTH>
  <SALES>75770</SALES>
</ROW>
- <ROW>
  <INDUSTRY_ID>442</INDUSTRY_ID>
  <INDUSTRY>Furniture & home furn</INDUSTRY>
  <YEAR>2007</YEAR>
  <MONTH>March</MONTH>
  <SALES>8804</SALES>
</ROW>
- <ROW>
  <INDUSTRY_ID>443</INDUSTRY_ID>
  <INDUSTRY>Electronics & applianc</INDUSTRY>
  <YEAR>2007</YEAR>
  <MONTH>March</MONTH>
  <SALES>8292</SALES>
  
```

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YEAR Sales

G

MONTH Sales

Category

F INDUSTRY

E

E

ORACLE

2006 Sales

March Sales

Category	Sales (In thousand US\$)
Motor vehicle & parts dealers	\$73,458
Furniture & home furnishings stores	\$8,655
Electronics & appliance stores	\$7,762
Building material & garden eq. & supplies dealers	\$25,385
Food & beverage stores	\$40,854
Health & personal care stores	\$16,977
Gasoline stations	\$25,167
Clothing & clothing accessories stores	\$15,917
Sporting goods, hobby, book & music stores	\$6,592
General merchandise stores	\$41,492
Miscellaneous store retailers	\$8,781
Nonstore retailers	\$18,353
Food services & drinking places	\$31,164

February Sales

Category	Sales (In thousand US\$)
Motor vehicle & parts dealers	\$71,554
Furniture & home furnishings stores	\$8,418
Electronics & appliance stores	\$7,710
Building material & garden eq. & supplies dealers	\$23,146
Food & beverage stores	\$40,449
Health & personal care stores	\$16,560
Gasoline stations	\$25,018
Clothing & clothing accessories stores	\$15,611
Sporting goods, hobby, book & music stores	\$6,672
General merchandise stores	\$40,869
Miscellaneous store retailers	\$8,648
Nonstore retailers	\$18,505
Food services & drinking places	\$30,803

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Template Design Tools: Template Builder for Microsoft Word Add-in

The screenshot shows the Microsoft Word interface with the BI Publisher add-in. The ribbon includes tabs for Home, Insert, Page Layout, References, Mailings, Review, View, Acrobat, BI Publisher, Design, and Layout. The BI Publisher ribbon contains sections for Log On, XML Schema, Table Wizard, Pivot Table, Chart, Field, Table/Form, Repeating Group, Conditional Format, Conditional Region, All Fields, PDF, HTML, Excel, and PowerPoint.

The main content area displays an invoice template with the following elements:

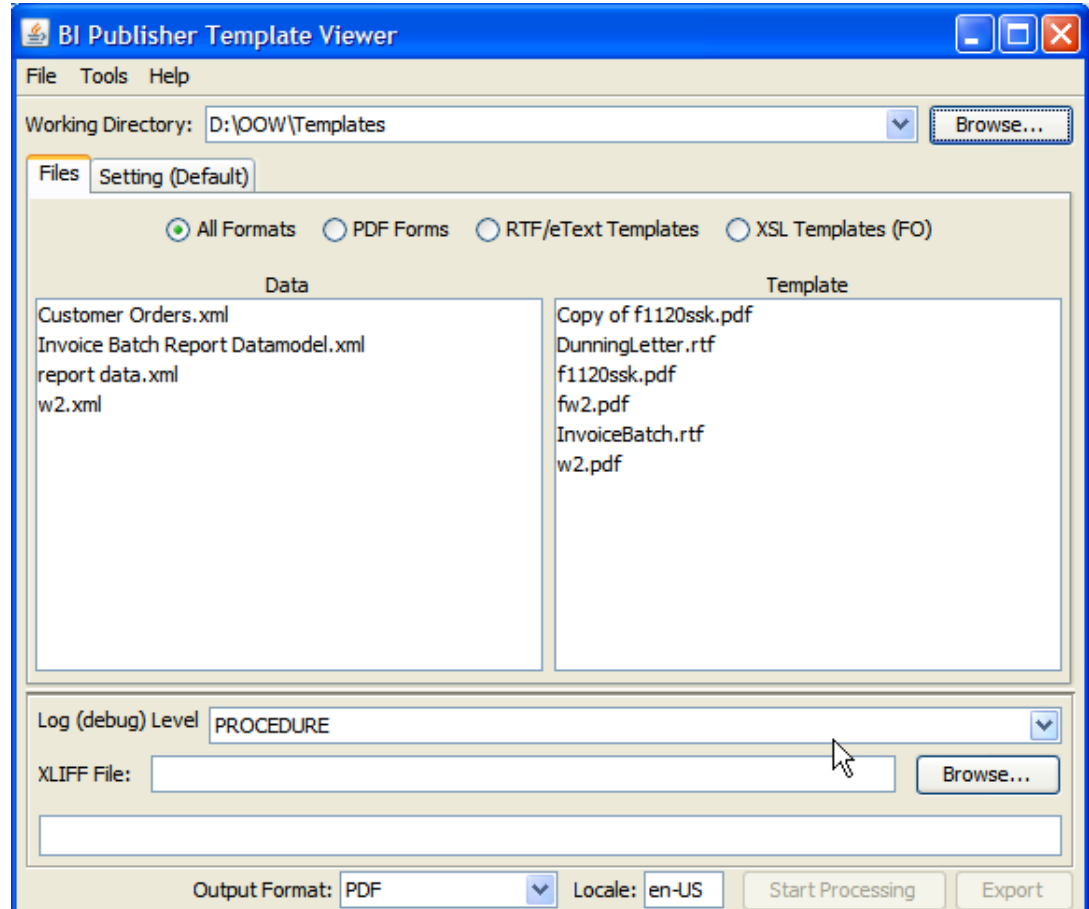
- ORACLE** logo
- Invoice** title
- Invoice Address** section with the placeholder `<?C_BILL_TO_CONCATENATED?>`
- Oracle Corporation** contact information: 500 Oracle Parkway, Redwood Shores, CA 94065, USA. Tel: + 650 507 000, Fax: + 650 507 000.
- www.oracle.com
- Page 1 of 1
- Invoice Information** table:

Invoice Information	
Invoice Number:	<code><?TRX_NUMBER?></code>
Invoice Date:	<code><?TRX_DATE?></code>
Payment Terms:	Immediate
Payment Due:	<code><?TERM_DUE_DATE_FROM_PS?></code>
Your VAT #:	234236464-44

At the bottom of the page, there is a placeholder `<?TRX_NUMBER?><?TRX_NUMBER?>`.

Desktop Template Viewer

- BI Publisher Desktop includes the BI Publisher engine
- Test your templates from your desktop using sample data



Template Design Tools: Adobe Acrobat Professional

File Edit View Document Comments Forms Tools Advanced Window Help

Create Combine Collaborate Secure Sign Forms Multimedia Comment

1 / 2 102% Find

Fields

Sort Tab Order

- Page 1
 - final
 - amended
 - year_beginning
 - year_ending
 - year
 - employer_id
 - co_name
 - irs_office
 - shareholder
 - topmostSubform[0].Page1[0].p1-t

Schedule K-1 (Form 1120S)
Department of the Treasury
Internal Revenue Service

2009

For calendar year 2009, or tax year beginning year begin 2009 ending year end 20

Shareholder's Share of Income, Deductions, Credits, etc. ▶ See back of form and separate instructions.

Part I Information About the Corporation

A Corporation's employer identification number employer id

B Corporation's name, address, city, state, and ZIP code co_name

Part III Shareholder's Share of Current Year Income, Deductions, Credits, and Other Items

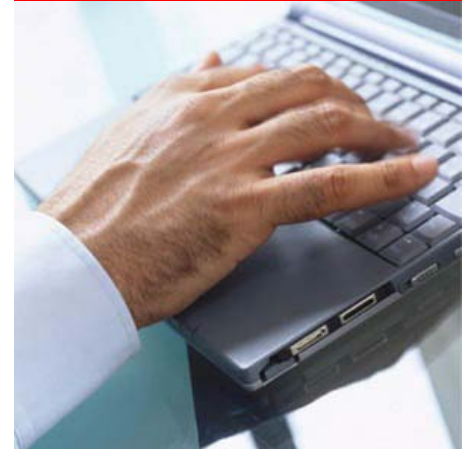
1	Ordinary business income (loss)	13	Credits
	<input type="text"/> income	topr	topmostSubform[0].Page1
2	Net rental real estate income (loss)		
	<input type="text"/> net rental	topr	topmostSubform[0].Page1
3	Other net rental income (loss)		
	<input type="text"/> other rental	topr	topmostSubform[0].Page1
4	Interest income		
	<input type="text"/> interest income	topr	topmostSubform[0].Page1
5a	Ordinary dividends		
	<input type="text"/> topmostSubform[0].Page1	topr	topmostSubform[0].Page1
5b	Qualified dividends	14	Foreign transactions
	<input type="text"/> topmostSubform[0].Page1	topr	topmostSubform[0].Page1
6	Royalties		
	<input type="text"/> topmostSubform[0].Page1	topr	topmostSubform[0].Page1
7	Net short-term capital gain (loss)		

Demonstration



Demonstration

- Create and run an RTF template
 - Requires Microsoft Word
 - BI Publisher 's Template Builder for Word Add-in
 - Sample Data from your report
- Create and run a PDF template
 - Requires Adobe Acrobat Professional
 - Sample Data from your report
 - BI Publisher's Template Viewer to test on your desktop (optional)



JD Edwards EnterpriseOne



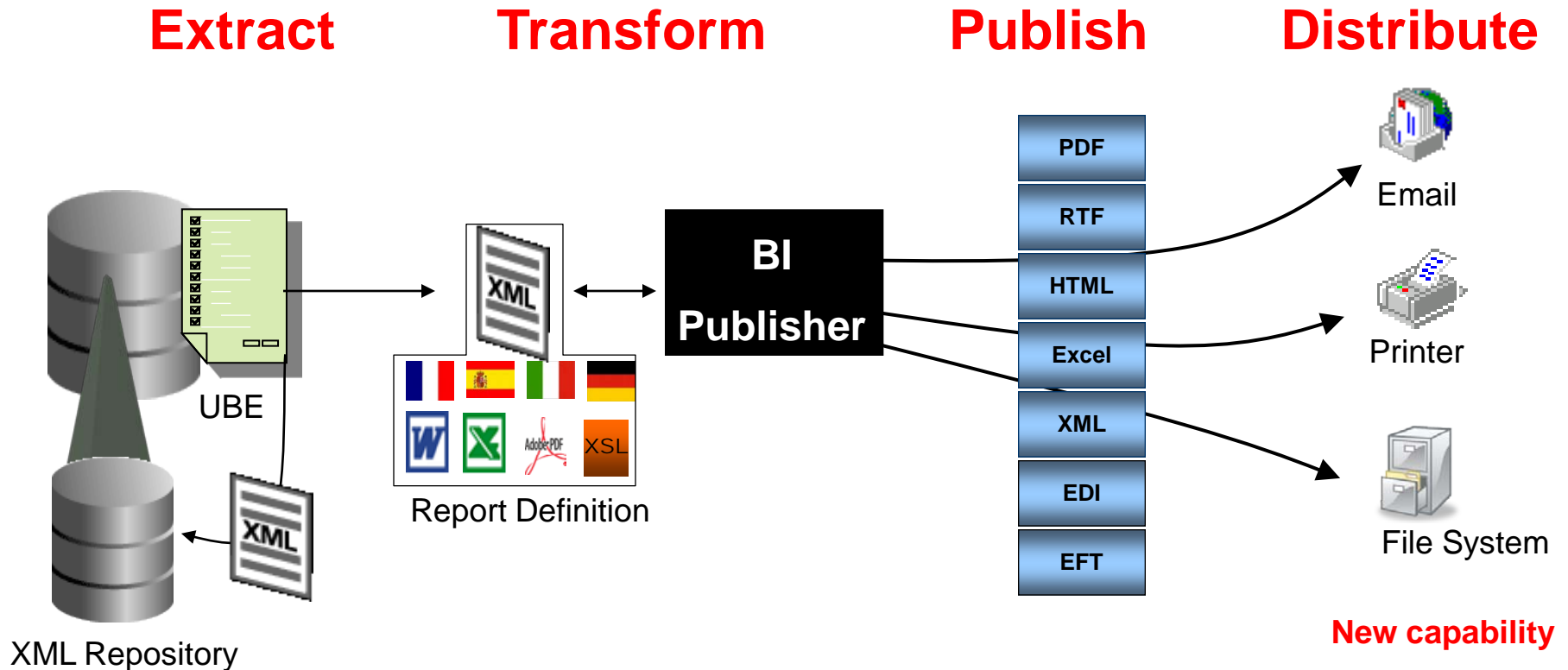
Embedded BI Publisher for JD EnterpriseOne vs BI Publisher Standalone/JD Edwards EnterpriseOne

BI Publisher is available to JD Edwards EnterpriseOne users in two ways:

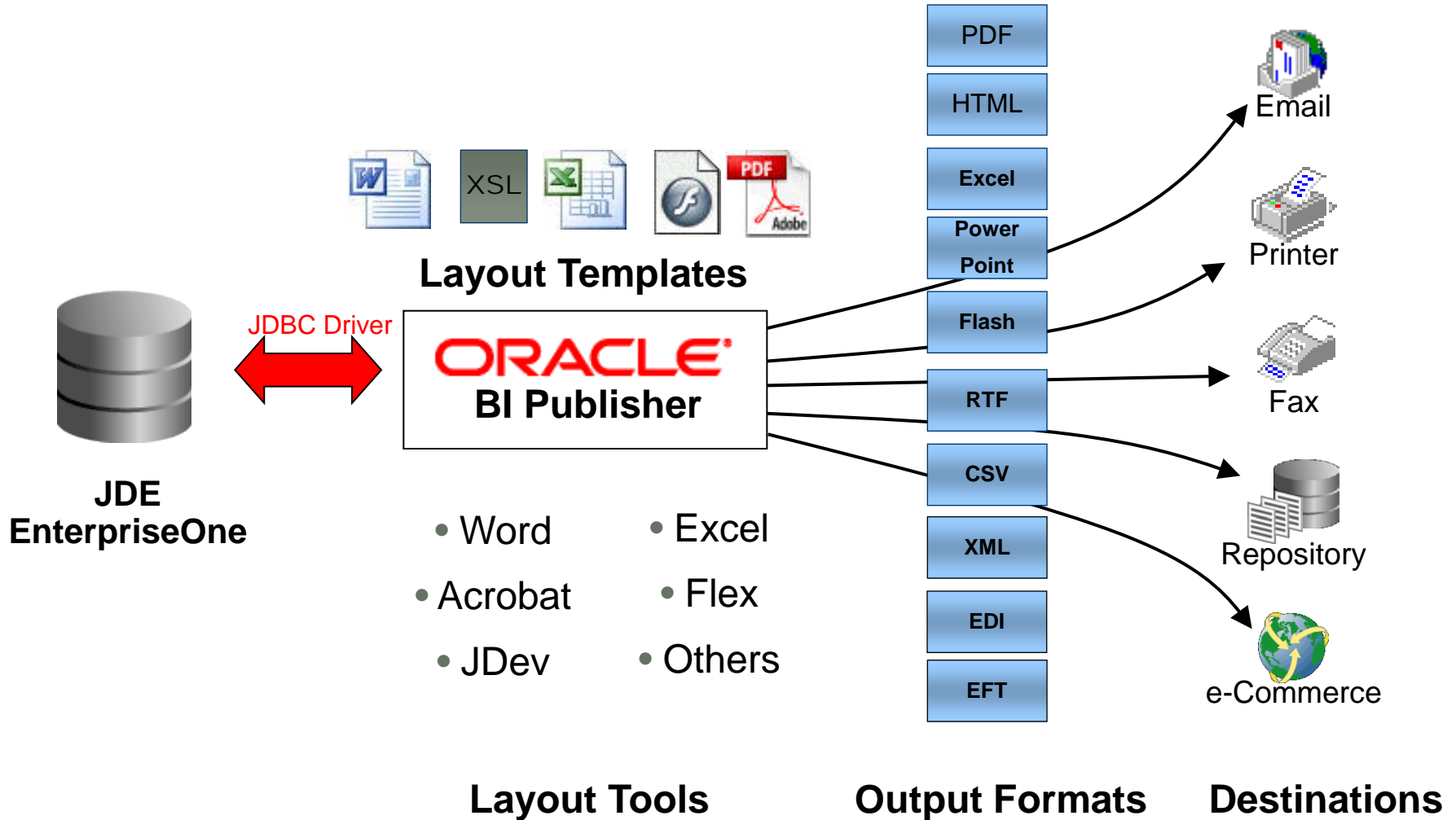
- Embedded BI Publisher for JDE1
 - To produce content rich reports that are part of the existing business process
- Oracle BI Publisher Standalone with JDE1
 - To empower business users to develop and execute user driven reports

Embedded BI Publisher

8.98.1 adds capability to save output to a file system



Oracle BI Publisher Standalone with JD Edwards EnterpriseOne



JDBC Driver Enhancements

Simplifying Query Building

- Intuitive table names
 - Improve the usability of BI Publisher Query Builder :
- User friendly column description
 - Display column name from the DD
 - Displays in the language of the end user
 - Provides consistence between JDE E1 apps and BI Publishers queries
- Automatically retrieve UDC descriptions

Customer Driven Enhancements

- Report Specific Email Subject and Body
- Recipient preference language
- Consolidated Output

Delivery

Printer

Address Book Number E-Mail Multi-Site Target Company

Distribution List Type

Consolidate Burs:ed Report for Address Number

E-Mail Address Language Italian

Consolidate Burs:ed Report for E-Mail Address

Data Driven E-Mail

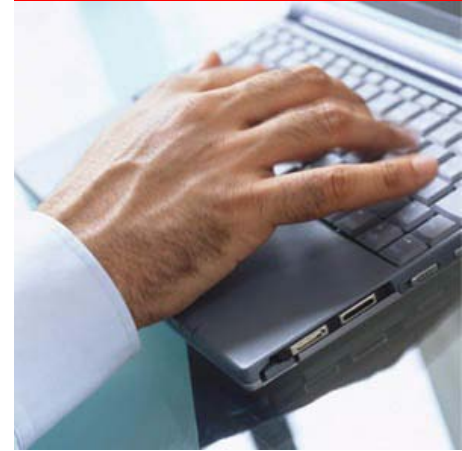
Distribution List Type

E-Mail Details

Data Item for Subject and Body

From E-Mail Address Override

For More Information on JD Edwards EnterpriseOne



On support.oracle.com, search for 789074.1

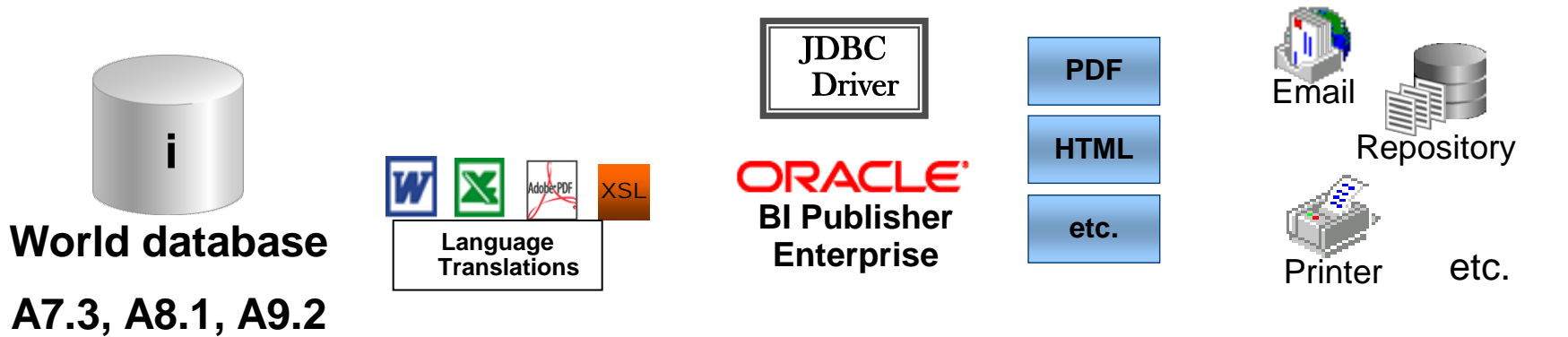
BI Publisher for JD Edwards EnterpriseOne [ID 789074.1]

JD Edwards **World**



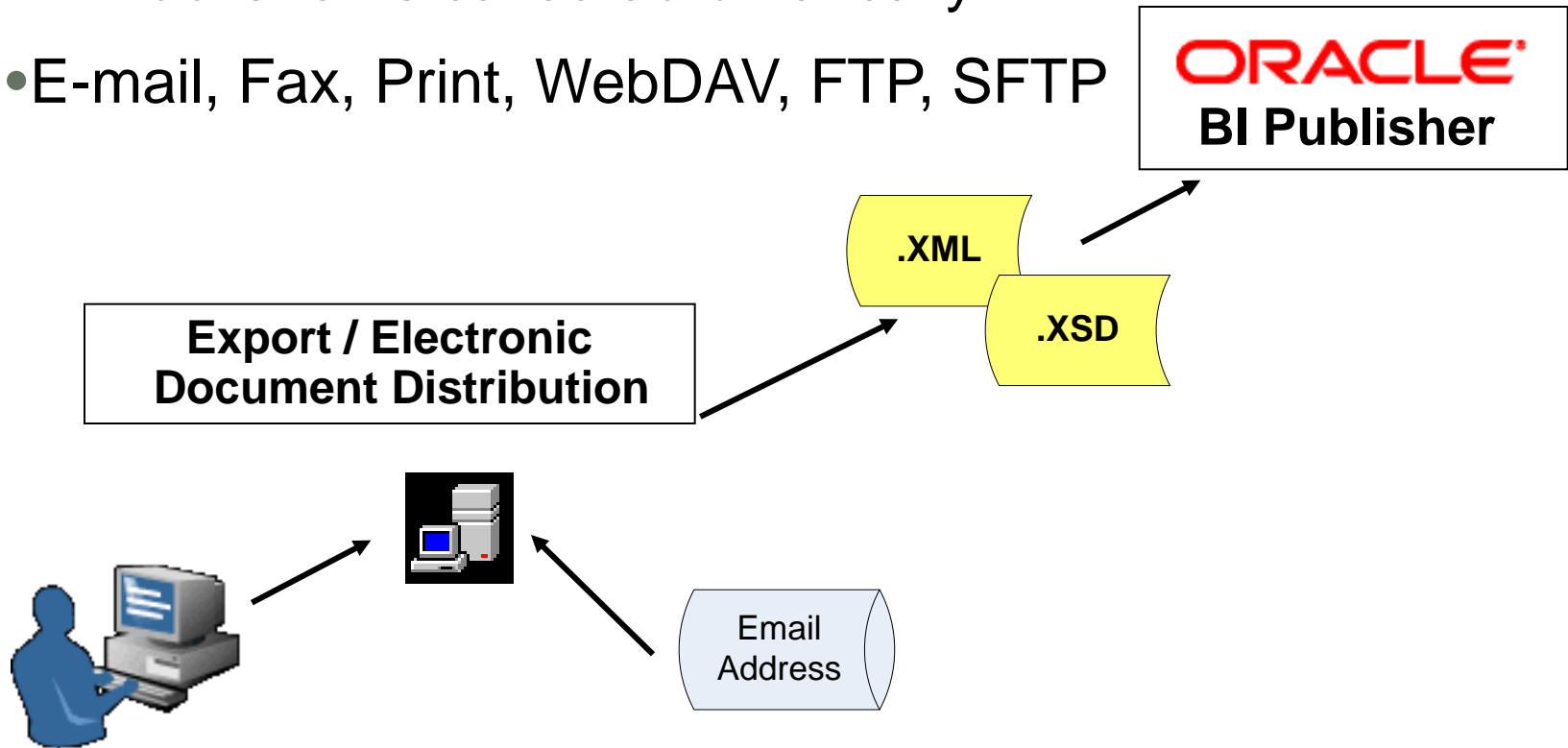
BI Publisher output from JD Edwards World Dream Writer and World Writer

Extract Data → Transform → Publish → Distribute

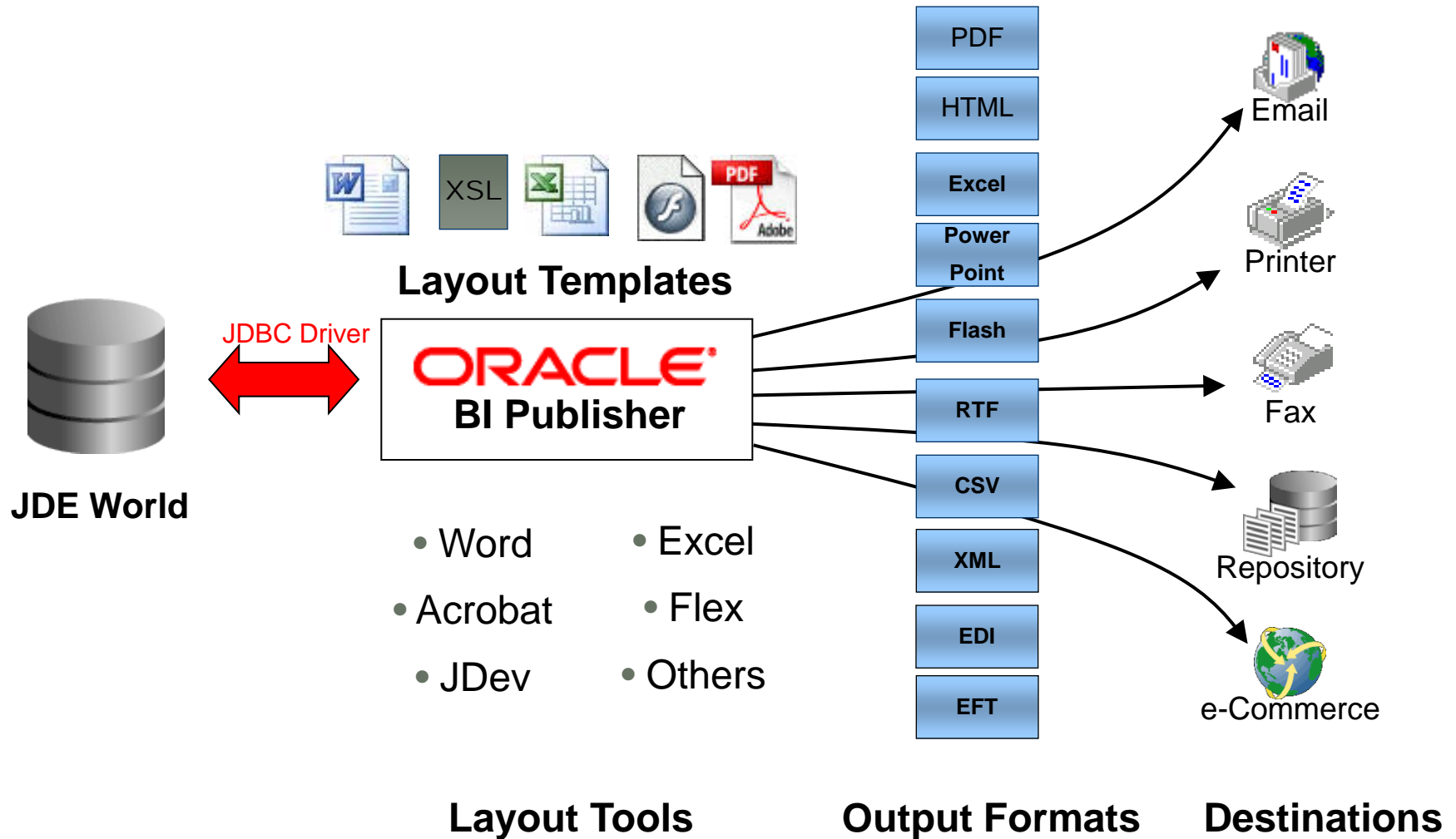


JD Edwards World Release A9.2

- Run Dream Writer or World Writer and “Export” to create XML
- BI Publisher is called automatically
- E-mail, Fax, Print, WebDAV, FTP, SFTP



Oracle BI Publisher Standalone with JD Edwards World



JD Edwards World Release A9.2: Expanded Integration

- More DREAM Writer reports
 - MPS Planning Report
 - Supplier Schedule Print
 - Invoices
 - Purchase Orders
 - Quote Request
- FASTR and STAR reports
- Sample Templates for BI Publisher reports are available for users to begin working with

JD Edwards World Sample Templates Provided

ORACLE
JD EDWARDS WORLD

Date: 08-02-2010
Order Number: 103 OP

PURCHASE ORDER

P34450
0810-08-02

43500
Page 1 of 1

ORACLE
JD EDWARDS WORLD

Sold To: Priester Supply Company
456 Rasberry Avenue
Building 3
Dock 2
South entrance
Arlington TX
United States

Tax ID:
Tax Cert:

INVOICE

P43565
Page 1

Ship To: Priester Supply Company
456 Rasberry Avenue
Building 3
Dock 2
South entrance
Arlington TX
United States

Tax ID:

Ln/Rq Dt	Description	Item	UOM	S	S/B/C	Price	Ext Price	Tax	E Cost	Percent
1.000	12V DC Ventilator	1400D	EA	S		1 405.0000	405.00	Y	405.00	0
6/19/2006		0				0 Per EA				
						0				
		Serial Numbers for line 1.000 891								

European VAT Report: Customize for Each Country Using Microsoft Word

[E0TKT1]
VAT European Sales List - Detailed Report

Supplier Country Code: **E0CTR** Report Period Range

Supplier VAT Registration Number: **E0TAX** Date From: **E0EFTJ**

Supplier Country Name: **E0DL01** Date To: **E0EFDJ**

Supplier Name: **E0ALPH** Branch/ Operating Unit: **E0DL03**

Supplier Address: **E0ADD1, E0ADD2
E0ADD3, E0ADD4
E0ADD5, E0CTY1- E0ADDZ**

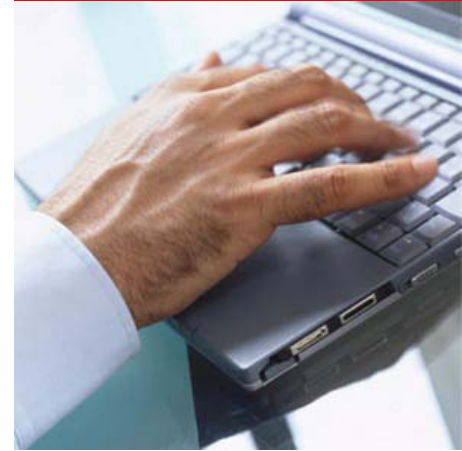
Supplier Currency: **E0DL02**

Local Tax Office: **E0DL04**

<?start.body?>

Country	VAT Tax No	Customer Name	Transac. Type	Transaction Number	Invoice Date	GL Date	Transaction in For Currency	Transaction in Domestic	Cr Order Number	Invoice Dt	GL Dt
F Variables E3CTR	E3TAX	ABALPH	E31NYP	E3KCO E3DCT E3DOC	E3DIVJ	E3DGJ	E3IAPM E3CRCD	E3IADM	E4UKCCU E4ODCT E4ODOC	E4DIVJ	E4DGJE
Total:								9.99			

For More Information on JD Edwards World



On support.oracle.com, search for 789078.1

The JD Edwards World JDBC Driver is downloadable from the MetaLink Update Center.

PeopleSoft



Peoplesoft – Generate XML Data

The screenshot displays the Oracle XML Publisher interface within a Microsoft Word document titled "CUSTOMER_LTR_FE4". The report content includes the Oracle XML Publisher logo, the HEUG logo, and a table of business units with remaining amounts.

RunDate

HEUG

GCUST_ID
NAME1
ADDRESS1
CITY, STATE POSTAL

Dear Sirs/Madam,

Welcome to Nashville, TN!

According to our records as of <?RunDate?>, we show the following open balance:

Business Unit	Remaining Amount
F BUSINESS_UNIT	\$999.99E

Your total outstanding balance is \$0 000 00

The "Field" dialog box is open, showing a tree view of fields. The "Name1" field is selected under the "Row" category. The "Example" section shows "NAME1 sample data".

Peoplesoft – Report Definition

The screenshot displays the Oracle PeopleSoft XML Publisher interface. On the left is a navigation menu with a search bar and a tree view. The tree view is expanded to 'XML Publisher', showing sub-items like 'Setup', 'Data Source', 'Report Definition', 'Content Library', 'Translations', 'Query Report Viewer', 'Query Report Scheduler', and 'XMLP Report Search'. The main content area is titled 'Main Menu > Reporting Tools > XML Publisher' and contains several tool cards: 'Data Source' (Register schema and sample data files for XML Publisher data sources), 'Report Definition' (Define reports by associating Data Sources with layout Template files), 'Content Library' (Create and maintain reusable Sub-Template definitions), 'Translations' (Register Translation XLIFF files for Report RTF templates and Content Library RTF sub-templates), 'Query Report Viewer' (Run Query-based XMLP reports real-time. View in a window.), 'Query Report Scheduler' (Schedule Query-based XMLP reports. Use to run bursted reports.), 'XMLP Report Search' (Locate XML Publisher report output using enhanced search criteria.), and 'Setup' (Prepare for using XML Publisher. Includes links for 'Report Category' and 'Design Helper').

Report definitions are used to:

- Associate a data source with a template.
- Define output options.
- Grant security to view report.
- Define bursting options.

Peoplesoft – Running BI Publisher Reports

The screenshot displays the Oracle BI Publisher web interface. On the left is a navigation menu with categories like 'My Favorites', 'Worklist', and 'Reporting Tools'. The 'Query Report Viewer' option is selected. The main area shows a search interface for report definitions. A search filter is set to 'Report Name' and 'begins with'. Below the search bar, a table lists the search results for report definitions.

Report Name	Description
CUSTOMERLETT	Customer Letter
CUST_LET	CUST_LET
I9_BURSTING	I9 Form Bursting
I9_PRINT	I9 Form Print
TEST	Customer Letter for Balance
XRFWIN	Cross Reference Window Listing

The generated report on the right features the Oracle XML Publisher logo and the HEUG logo. The report header includes the address: 10012 Boxter Industries, 4400 Hacienda Drive, Pleasanton, CA 94588. The body of the report contains a greeting and a statement of open balances as of 03/12/2006.

Business Unit	Remaining Amount
US005	\$690.83
US006	\$100.00
US007	\$500.00

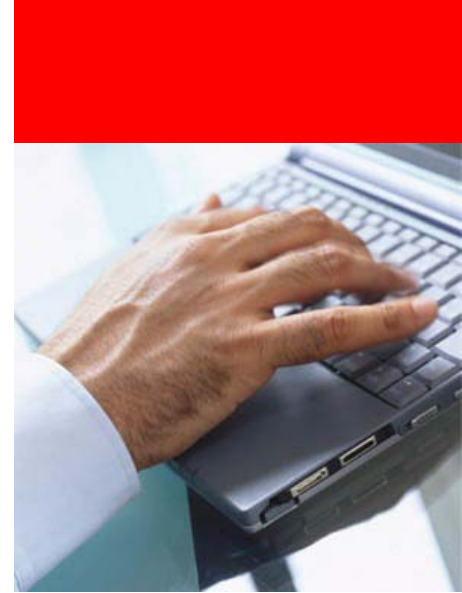
Your total outstanding balance is \$1,290.83.

New BI Publisher Features with PeopleTools 8.50

- PDF Full Path Mapping
- Descriptive Report Names
- Support for Email
- Alternative XML Preview
- XDO Properties Configuration
- Iterative Template Design

For more information

- Release Notes for PeopleSoft Enterprise PeopleTools 8.50
- Enterprise PeopleTools 8.50
PeopleBook: XML Publisher for PeopleSoft Enterprise



E-Business Suite



XML Publisher Releases in E-Business Suite Releases

- Release 11.5.10
 - XML Publisher 4.5 – 12/31/04
- Post Release 11.5.10
 - XML Publisher 5.5 – 01/06/05
 - Performance, Translation, Template Builder, Common Regions
 - XML Publisher 5.6 – 01/10/06
 - Administration UI, Data Engine, Book Binder
- Release 12
 - XML Publisher 5.6.3
 - Runtime Optimization, Enhancements

E-Business Suite Release 12

- HRMS using many government forms from all around the world
- Payments utilizing Publisher for Banking and Credit Card payment processing
- Financial Applications has consolidated many data sources and providing multiple templates
- Oracle Reports to BI Publisher Conversion Assistant

The image displays a BI Publisher report titled "BILL OF LADING" with a date of 14-MAR-2007. The report is divided into several sections: SHIP FROM, SHIP TO, THIRD PARTY FREIGHT CHARGER BILL TO, SPECIAL INSTRUCTIONS, CUSTOMER ORDER INFORMATION, CARRIER INFORMATION, and SHIPPER SIGNATURE / DATE. The SHIP FROM section includes details for NCR CORPORATION, 3300 Shawnee Industrial Way, Suwanee, GA 30024. The SHIP TO section includes details for US - Intercomary, Atlanta Distribution Cen, 3300 Shawnee Industrial, Suwanee, GA 30024. The THIRD PARTY FREIGHT CHARGER BILL TO section includes details for NCR SYSTEMEDIA, C/O DATA/LOGISTICS, 976 FLORIDA CENTRAL PKWY, LONGWOOD, FL 32765, US. The CUSTOMER ORDER INFORMATION table shows a single row with CUSTOMER ORDER NUMBER 8628, # PKGS 5, WEIGHT 7, and PALETTE COUNT 7. The CARRIER INFORMATION table shows a single row with QTY 5, TYPE, WEIGHT 7, H.M. (X), and COMMODITY DESCRIPTION. The SHIPPER SIGNATURE / DATE section includes a table for SHIPPER SIGNATURE / DATE with columns for SHIPPER SIGNATURE / DATE, BY SHIPPER, BY DRIVER, BY OVERSEAS, and BY OVERSEAS.

```

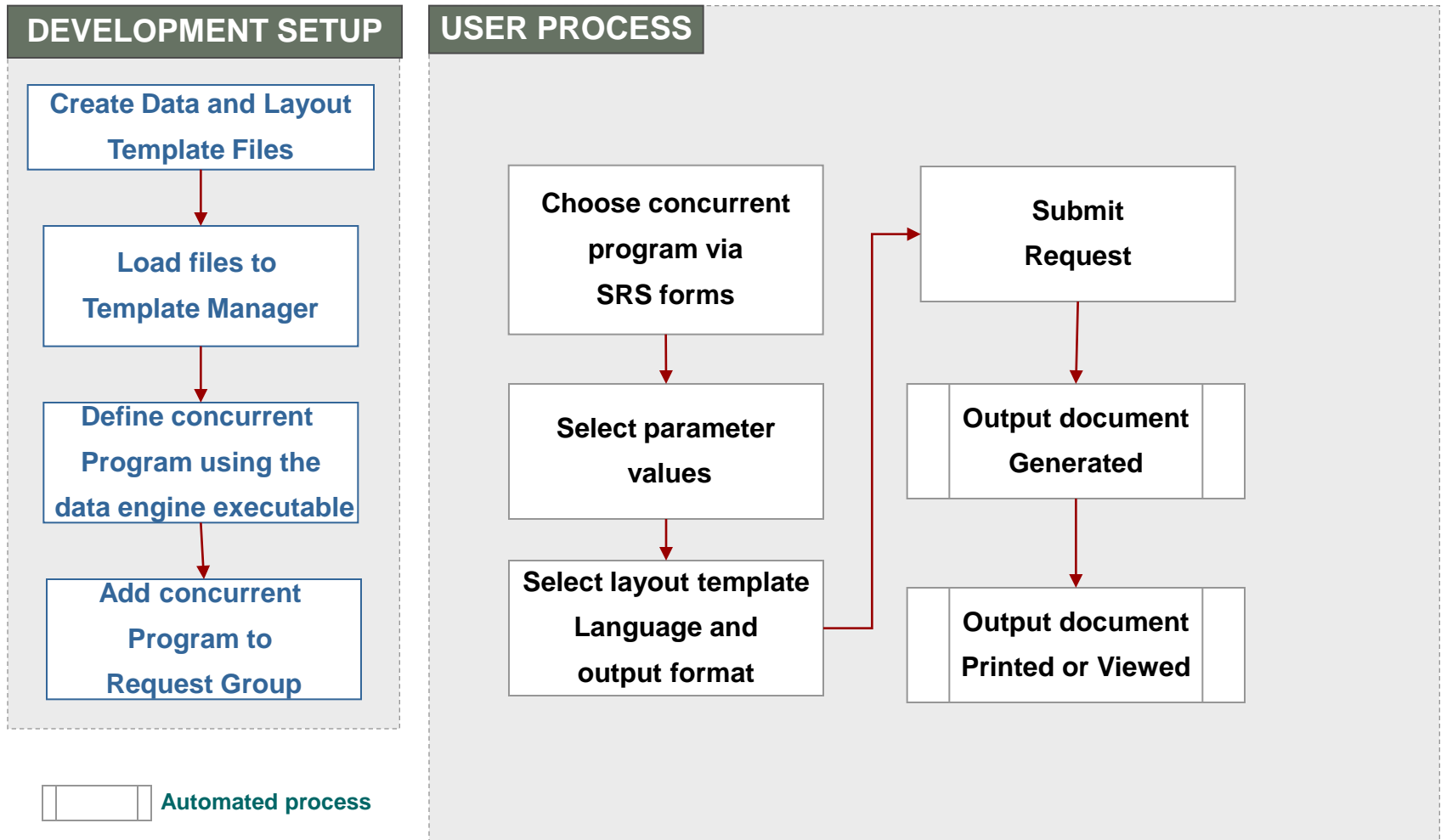
- <dataTemplate name="EMPLOYEES"
- <properties>
  <property name="include_param"
  <property name="include_null_!
  <property name="xml_tag_case"
  <property name="db_fetch_size"
  <property name="scalable_mod"
  <property name="include_rows"
  <property name="debug_mode"
</properties>
- <parameters>
  <parameter name="pDeptNo" ds
</parameters>
<decimals />
- <dataQuery>
- <sqlStatement name="DEPT" dat
- <![CDATA[

SELECT
DEPTNO,
LOC,
CURSOR(SELECT EMPNO,
from dept
where deptno = :v1 (:p_DeptNo,deptno)

order by deptno
]]>
</sqlStatement>

```

Setup and Process – Overview



Create a New Report – Overview

- Create Data Template
- Create Layout Template
- Register data and template definitions and load data template and layout template
- Define concurrent program
- Add concurrent program to request group

Create Data Template

```
- <dataTemplate name="dataTemplateName" description="Template description"
  dataSourceRef="ORCL" defaultPackage="employee" version="1.0">
  Define Parameters
  <parameters>
    <parameter name="department" dataType="character" defaultValue="10"/>
  </parameters>
  Define Data Query
  <dataQuery>
    - <sqlStatement name="Q1">
      SELECT EMPNO,ENAME,SAL from emp where deptno=:department
    </sqlStatement>
  </dataQuery>
  Define Triggers
  <dataTrigger name="beforeReport" source="employee.beforeReportTrigger"/>
  Define Data Structure
  <dataStructure>
    - <group name="G_EMPLOYEE" source="Q1">
      <element name="EMPLOYEE_NUMBER" value="EMPNO"/>
      <element name="NAME" value="ENAME"/>
      <element name="SALARY" value="SAL"/>
    </group>
  </dataStructure>
</dataTemplate>
```

The data template consists of:

- A <parameters> section in which parameters are declared in child <parameter> elements
- A <dataQuery> section in which the SQL queries are defined in child <sqlStatement> elements
 - A <dataStructure> section in which the output XML structure is defined

Create Layout Template

The image shows two overlapping windows. The top window is Microsoft Word, displaying a document template for an invoice. The bottom window is Adobe Reader, displaying a 2003 W-2 Wage and Tax Statement form.

Microsoft Word Document Template:

ImportHeaderFooter

CUSTOMER_NAME
 ADDRESS_LINE1
 ADDRESS_LINE2
 ADDRESS_LINE3
 ADDRESS_LINE4
 CITY
 STATE
 ZIP

Dear Sirs/Madam,

According to our records as of 1 Jan 2003, we
 Your USD balance is \$1,000.00, made up as

GS
 Invoice Date TRANSACTION_DATE

Invoice Number	Invoice Type
F TRX_NUMBER	TRANS_TYPE

Invoice Balance

On-Account Credits and Receipts

Total

Please confirm the above information.

Adobe Reader - [w2.pdf]

Form W-2 Wage and Tax Statement (99) 2003

Department of the Treasury—Internal Revenue Service
 For Privacy Act and Paperwork Reduction Act Notice, see separate instructions.
 Cat. No. 10134D

Do Not Cut, Fold, or Staple Forms on This Page — Do Not Cut, Fold, or Staple Forms on This Page

Register Data Definition

1. Use XML Publisher Administrator responsibility
2. Create data definition
3. Load sample data and schema if required (only pdf layouts)
4. Load data template file

The screenshot displays the 'Data Definitions' window in Oracle XML Publisher Administrator. The 'General' tab is selected, showing the following details for a data definition:

- Name: Supplier Data
- Code: APXCOBLX
- Application: Oracle Payables
- Start Date: 29-Aug-2006
- Description: Data for suppliers

The background window shows a list of data definitions with the following entries:

Name
Open Balance Supplier Letter Data
VETS-2000 DataSource
Customer Listing Summary
FSG program
Sourcing Data Source
Contract Terms Data Definition for iStore
Contract Terms Data Definition
Project Contracts Data Source
Standard Purchase Order Data Source
Blanket Purchase Agreement Data Source

Register Layout Template

1. Use XML Publisher Administrator responsibility
2. Create template entry, assign it the Data Definition Code
3. Load template file

Templates

Search

Name

Application

Type

Name

[Supplier Balances Letter](#)

[Supplier Balances Letter - Green](#)

[VETS-2000 Template](#)

[Customer Listing Summary - Simple](#)

[FSG - Simple](#)

[FSG - Quarterly Report](#)

[Sourcing Style Sheet](#)

[FSG: Basic Template](#)

[Contract Terms Layout Template for](#)

[Oracle Contract Terms Template](#)

View Template: Supplier Balances Letter

General

[Personalize "General Information"](#)

Name **Supplier Balances Letter**

Application **Oracle Payables**

Type **RTF**

Default File **apxsoblx-2.rtf**

Default File Language **English**

Default File Territory **United States**

Code **APXSUBLX_1**

Data Definition **Open Balance Supplier Letter Data**

Start Date **01-Mar-2004**

End Date

Subtemplate

Description

Template Files

[Personalize "Template Files"](#)

[Personalize Stack Layout: \(Files.PreviewFormatRn\)](#)

Preview Format

Localized Templates

[Personalize Stack Layout: \(Files.LocalFilesLayoutRn\)](#)

File Name	Language	Territory	Preview	Download	Update	Delete
apxsoblx-2.rtf	English	United States				

Define Concurrent Program & Executable

1. Use System Administrator responsibility
2. Create a concurrent program definition using the XML Publisher Data Template executable

The image shows two overlapping Oracle configuration windows. The background window is titled "Concurrent Programs" and contains the following fields:

- Program: Supplier Open Balance Letter (with a checked "Enabled" checkbox)
- Short Name: APXSUBLX
- Application: Oracle Payables
- Description: Supplier Balance Letter
- Executable section:
 - Name: XDODTEXE (highlighted with a yellow box)
 - Method: Java Concurrent Program
 - Options: (empty)
 - Priority: (empty)
- Request section:
 - Type: (empty)
 - Incrementor: (empty)
 - MLS Function: (empty)
 - Use in SRS:
 - Run Alone:
 - Enable Trace:
 - Allow Disabled Values:
 - Restart on System:
 - NLS Compliant:

The foreground window is titled "Concurrent Program Executable" and contains the following fields:

- Executable: XML Publisher Data Template Executable (highlighted with a yellow box)
- Short Name: XDODTEXE
- Application: XML Publisher
- Description: XML Publisher Data Template Executable
- Execution Method: Java Concurrent Program
- Execution File Name: JCP4XDODDataEngine (highlighted with a yellow box)
- Subroutine Name: (empty)
- Execution File Path: oracle.apps.xdo.oo.cp (highlighted with a yellow box)

Buttons at the bottom of the "Concurrent Programs" window include "Copy to..." and "Session Control". A "Stage Function Parameters" button is visible at the bottom of the "Concurrent Program Executable" window.

Add Program to Request Group

Request Groups

Group: Receivables All

Application: Receivables

Code:

Description: All reports and programs

Requests

Type	Name	Application
Program	Workflow Background Process	Application Object Library
Program	ADS Financials	General Ledger
Program	Publish RX Reports	Assets
Program	Collection Effectiveness Indicators	Receivables
Program	Autoinvoice Import Program	Receivables
Program	Aging - 7 Buckets - By Amount Report (ob	Receivables
Program	Aging - 4 Buckets Report	Receivables
Program	Aging - 7 Buckets - By Salesperson/Agent	Receivables
Program	Aging - 7 Buckets Report (obsolete)	Receivables
Program	Billing and Receipt History	Receivables

Description: Workflow background process for deferred and timeout activities

Run the Report: User Selects the Report From a List and Enters Parameters

The image shows a 'Submit Request' dialog box with the following fields and options:

- Run this Request...**
 - Name: Concurrent Program Details Report - XML Publisher
 - Operating Unit: [Empty]
 - Parameters: [Empty]
 - Language: American English
 - Buttons: Copy..., Language Settings..., Debug Options
- At these Times...**
 - Run the Job: As Soon as Possible
- Upon Completion...**
 - Save all Output
 - Layout: Program Details
 - Notify: [Empty]
 - Print to: noprint
- Buttons: Help (C), Submit, Cancel

The 'Parameters' sub-dialog box is open, showing:

- Application Name: [Empty]
- Program: [Empty]
- Buttons: OK, Cancel, Clear, Help

User Can Select a Template, Language and Output Format

Template Name	Template Language	Format	For Language
Program Details - Simple	English: United States	PDF	AMERICAN

Name	For Language

Printer	Copies	For Language
noprint	0	All languages

1. User can select a different template from the LOV
2. Then a different language if available
3. Then an output format

Seibel CRM



Actuate Reports Conversion Assistant

- Command line utility that converts the Actuate layout design into BI Publisher layout design.
 - Actuate report layout convertor (from .ROD to .RTF)
- Available to BI Publisher customers at no additional charge
- Available via patch 8968224

Migration Strategy

Siebel BI Publisher Integration

- Actuate and BI Publisher parallel report execution through integration patches
- Use Actuate Conversion Assistant tool to migrate Actuate reports to BI Publisher

The screenshot shows the Siebel System Preferences interface. The 'ReportEngineType' system preference is highlighted and set to 'BOTH'. A context menu is open over the 'Accounts List' table, showing a list of reports under the 'ACTUATE' section, including 'Account Service Profile', 'Account List', 'Current Account Service Profile', 'Smart Report Account Summary', and 'Smart Report Account Service Detail'. Below the 'ACTUATE' section, there is a 'BIP' section with 'My Reports', 'Schedule Report', and another 'Account List'.

System Preference Name	System Preference Value
ReportEngineType	BOTH

Account Name	Site
3Com	Headquarters
3Com Distribution	UK
3Com Research	US

System Preference
set to 'BOTH'

Siebel Reporting Migration FAQ (Doc ID: 764097.1)

Siebel – Steps for creating BI Publisher Report

Generate XML Data

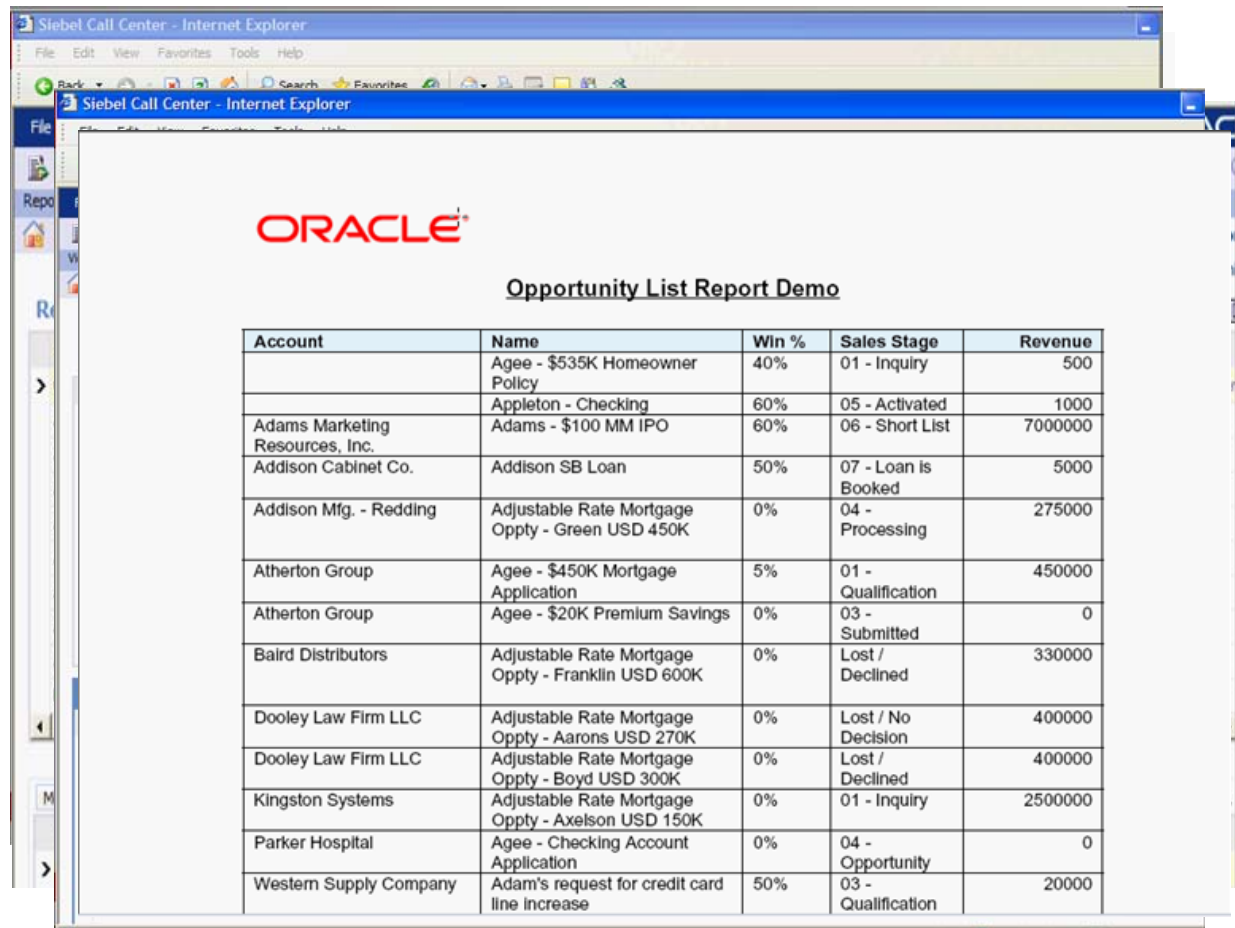
Create Template

Upload Template

**Associate with
Integration Object**

**Associate report
with a View**

**Without having to
restart the
application, you
have deployed your
report**



The screenshot displays a web browser window titled 'Siebel Call Center - Internet Explorer'. The main content area shows the Oracle logo at the top, followed by the report title 'Opportunity List Report Demo'. Below the title is a table with five columns: Account, Name, Win %, Sales Stage, and Revenue. The table contains 15 rows of data representing various business opportunities.

Account	Name	Win %	Sales Stage	Revenue
	Agee - \$535K Homeowner Policy	40%	01 - Inquiry	500
	Appleton - Checking	60%	05 - Activated	1000
Adams Marketing Resources, Inc.	Adams - \$100 MM IPO	60%	06 - Short List	7000000
Addison Cabinet Co.	Addison SB Loan	50%	07 - Loan is Booked	5000
Addison Mfg. - Redding	Adjustable Rate Mortgage Oppty - Green USD 450K	0%	04 - Processing	275000
Atherton Group	Agee - \$450K Mortgage Application	5%	01 - Qualification	450000
Atherton Group	Agee - \$20K Premium Savings	0%	03 - Submitted	0
Baird Distributors	Adjustable Rate Mortgage Oppty - Franklin USD 600K	0%	Lost / Declined	330000
Dooley Law Firm LLC	Adjustable Rate Mortgage Oppty - Aarons USD 270K	0%	Lost / No Decision	400000
Dooley Law Firm LLC	Adjustable Rate Mortgage Oppty - Boyd USD 300K	0%	Lost / Declined	400000
Kingston Systems	Adjustable Rate Mortgage Oppty - Axelson USD 150K	0%	01 - Inquiry	2500000
Parker Hospital	Agee - Checking Account Application	0%	04 - Opportunity	0
Western Supply Company	Adam's request for credit card line increase	50%	03 - Qualification	20000

Key Enhancements

8.1.1.1 Fix Pack

- Reports Scheduling Integration to BI Publisher
 - Interactive Parameterized Reports
 - User Management enhancements
 - Reports Business Service
 - BI Publisher Reports Server Views (for Scheduled Jobs)
 - Certification for BI Publisher 10.1.3.4.1
-
- Solution also ported to 7.7.2.12, 7.8.2.14 and 8.0.0.8

Key Enhancements

8.1.1.1 Fix Pack – Sample Publisher reports provided out of the box

- **Accounts:**
 - Account List
 - Account Service Profile
 - Enterprise Selling Plan – Overview
- **Contacts:**
 - Contact List
 - Contacts By Opportunity
 - Alphabetic Phone List
- **Opportunities:**
 - Opportunity List
 - Opportunities By Sales Rep
 - Pipeline Report By Sales Rep

Key Enhancements

8.1.1.3 Fix Pack

- Multi-lingual reports from a single OM
 - Reports Sharing (Interactive reports)
 - Personal Reports Template (My Report Templates, All Report Templates)
 - View Report Sequence (Report menu order)
 - Enhanced My Reports View (Query, Delete, Output Type etc...)
 - Current Record Only & Multi-Select record reports
-
- Major features also ported to 7.8.2.14 QF, 8.0.0.9 QF

Future Enhancements

8.1.1.x Fix Pack

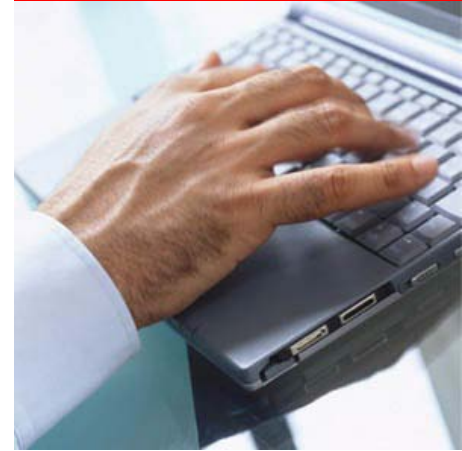
- User interface enhancements
- Business Service
 - Support for scheduling, delivery channels, email
- Enhance Parameterized reports solution
- Further enhance My Reports View
- Advanced reports
- Scheduling
- Expansive multilingual reporting solution

Customer Deployments

Siebel BI Publisher



For More Information on Siebel



- Siebel Reporting Migration FAQ (Doc ID: 764097.1)

<https://metalink3.oracle.com/od/faces/secure/km/DocumentDisplay.jspx?id=764097.1>

- Siebel Reporting Migration Guide for Reports Developers
([Document 764191.1](#))

Stay Connected with BI Publisher



<http://www.youtube.com/bipublisher>



<http://twitter.com/oracleEPMBI>



<http://www.linkedin.com/groups?mostPopular=&gid=49643>



<http://www.facebook.com/OracleEPMBI?v=wall>

BI Publisher Resources


- Home Page
 - <http://www.oracle.com/technetwork/middleware/bi-publisher>
- Public Forum
 - <http://forums.oracle.com/forums/forum.jspa?forumID=245>
- Blog
 - <http://blogs.oracle.com/xmlpublisher>
- Community
 - <http://www.oracle.com/technetwork/middleware/bi-publisher/community>
- Documentation
 - <http://www.oracle.com/technetwork/middleware/bi-publisher/documentation>
- Tutorials
 - http://www.oracle.com/technology/obe/obe_bi/bipub/index.html

For More Information

- **Publisher Home Page**
<http://www.oracle.com/technology/products/xml-publisher/index.html>
- **Publisher Demo Catalog**
<http://www.oracle.com/technology/products/xml-publisher/demoshelf/Shelf.html>
- **Publisher Blog**
<http://blogs.oracle.com/xmlpublisher/>
- **Publisher Forum**
<http://forums.oracle.com/forums/forum.jspa?forumID=245>
- **White Paper – Converting Crystal Reports to Oracle BI Publisher**
<http://download.oracle.com/otndocs/xmlp/CrystaltoBIP.pdf>

For More Information

<http://search.oracle.com>

or

<http://www.oracle.com/technology/products/xml-publisher>

Hardware and Software

ORACLE®

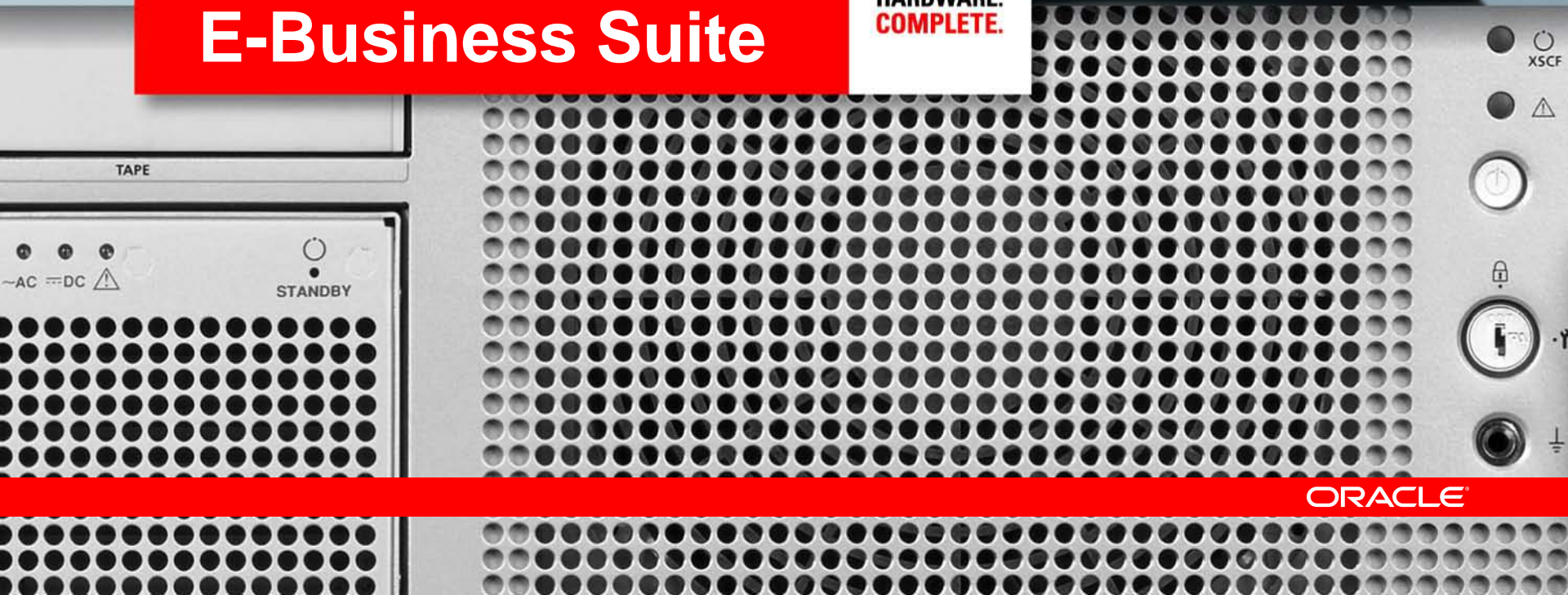
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Appendix: E-Business Suite

SOFTWARE.
HARDWARE.
COMPLETE.



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Output Post Processor (OPP) Manager

- Note **291792.1** – Using the OPP in Oracle Applications Concurrent Processing
- OPP is an extension to Concurrent Processing
- Takes care of all post-processing actions for concurrent requests
- Required for single-step reporting using XML Publisher.
- Triggered by Conc. Manager upon completion of the XML output generation
- Maximum throughput defined as:
$$\#processes \times \#threads = MAX \#parallel \text{ reports}$$

→ if needed, increase the default values
- Profile Options:
 - Concurrent: OPP Response Timeout
 - Concurrent: OPP Process Timeout

OPP Manager Setup

- The OPP Service is multi-threaded and will start a new thread for each concurrent request it processes.
- You can control the number of simultaneous threads for an OPP Service Instance by adjusting the Threads per Process parameter for the instance.
- If all the OPP process have reached their respective maximum number of threads, the requests waiting to be processed remain in a queue to be processed as soon as threads become available.

Work Shifts

[Return to Top](#)

[Add Work Shifts](#)

Select Name	Description	Processes	Threads Per Process
<input checked="" type="radio"/> Standard	Active 24 hours every day	<input type="text" value="1"/>	<input type="text" value="5"/>

TIP Threads per Process should be between 1 to 20

Detailed Process Overview (1 of 2)

1. Choose a report to publish in XDO.

To avoid breaking the seeded Concurrent program, copy the current program to a new name (such as Active Users XML) using the Copy Program functionality in FNDCMMCP. This provides a new Alias but doesn't touch the seeded definitions. Any patches to the seeded program will update the copy as it points to the seeded program. Only maintenance is the need to update the parameter list if the seed programs parameters are changed. Add the report to a responsibilities report/request group.

Detailed Process Overview (2 of 2)

2. Change the output format to XML and run the report to get a sample data set.
3. Using the XML data, create an RTF template in the Template Builder (Or you can create a PDF or XSL-FO template.)
4. Create a Data Definition and Template definition in Applications as XML Publisher Administrator.
5. Link Template to Report using System Administration responsibility (Self-Service).
6. Setup OPP manager.
7. Submit the request and view the output.
8. Enable printing of the report (To print PDF output requires pasta and ghostview or acroread.)

BI Publisher Desktop 5.6.3

- BI Publisher Desktop 5.6.3 (10.1.3.2)
- 5.6.3 = 10.1.3.2 for Enterprise users, same basic code tool can be used to login and connect to 10.1.3.2 BI Publisher Enterprise.
- Patch 5887917 Oracle XML Publisher Desktop Patch 5.6.3 includes
 - Template Builder for Word
 - Template Builder Tutorial
 - Template Viewer
 - RTF, PDF and eText examples.

XML Publisher References

- Note 364547.1 – Troubleshooting Oracle XML Publisher For The Oracle E-Business Suite
- Note 737311.1 – How to Configure the Account Analysis Report in Release 12 for Large Reports
- XML Publisher 5.6.3
 - Note 422508.1 - About Oracle XML Publisher Release 5.6.3
 - Oracle XML Publisher Administration and Developer's Guide Release 12 B31412-01
 - Oracle XML Publisher Report Designer's Guide Release 12 B31410-01

Fax Your Documents through RightFax Server

- Deliver faxes directly from the BI Publisher Delivery Manager to any fax destination and query the status of the job using RightFax 9.3 or above.
- Implemented by the Oracle Collections team for the Strategy Dunning Program.
- Blog article by Pradeep K. Sharma
 - http://blogs.oracle.com/xmlpublisher/2009/07/now_fax_your_documents_through_1.html