Convert from Oracle Reports, Crystal or Actuate to Oracle Business Intelligence 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.
Agenda

- Oracle BI Publisher – Introduction
  - Why convert to BI Publisher?
- Conversion Strategies and Techniques
  - Oracle Reports Conversion
  - Actuate Report Conversion
  - Crystal Reports Conversion
- Oracle Reports Migration Experience
- Crystal Reports Migration Experience
Oracle’s Enterprise Performance Management System

EPM Workspace

Performance Management Applications  BI Applications

Business Intelligence Foundation

Fusion Middleware

BI Publisher is part of the BI Foundation layer in Oracle’s EPM system

OLTP & ODS Systems  Data Warehouse Data Mart  OLAP  SAP, Oracle, Siebel, PeopleSoft, Custom  Excel XML  Business Process

Excel

XML

Business

Process

ORACLE
Why Convert to BI Publisher?
Simplified Report Maintenance

Separate query, layout, and translation

- Flexibility
- Reduced maintenance
Why Convert to BI Publisher?

Faster Development

- Business users create layouts with familiar desktop tools
- IT builds data model

Report Templates

Multiple Data Sources

✓ Rapid Development
Why Convert to BI Publisher?

Single Solution Environment

Oracle BI Publisher

- Author
- Manage
- Deliver

ALL Your Business Documents

✓ Meet Business Requirements
✓ Remove Complexity
✓ Reduce Maintenance Cost
✓ Reduce Total Cost
Why Convert to BI Publisher?
Single Solution Environment

- Purchase Orders
- Labels / Bar Codes
- Collateral
- Government Forms
- eText
- Order Forms
- Invoices
- Operational Reports
- Correspondence
- Financial Statements
- Checks
Why Convert to BI Publisher?

Others

• Cory Keogh …

• Ike Wiggins …

GALLUP®
Agenda

• Oracle BI Publisher – Introduction
  – Why convert to BI Publisher?

• Conversion Strategies and Techniques
  – Oracle Reports Conversion
  – Actuate Report Conversion
  – Crystal Reports Conversion

• Oracle Reports Migration Experience
• Crystal Reports Migration Experience
Conversion Strategies and Techniques

• Analyze reports
  – Eliminate unused reports
  – Categorize reports by Data
  – Categorize reports by Complexity
  – Evaluate the report size
  – Reduce number of reports

• Use Data Template to handle Data design
• Use RTF Template to handle Layout design
• Convert data handling functions into database functions
• Convert layout formatting functions into XSL/java functions
Oracle Reports Conversion

Steps with conversion tool

• Run the conversion Tool
• Load the PL/SQL package into Database
• Upload report and template to BI Publisher Repository
• View Report
• Check Log file for parts needing manual conversion
Actuate Report Conversion

Layout Conversion

Actuate Design File (ROD)

Actuate Output File (BAS)

Layout Conversion Tool

Siebel Tools Objects
- Business Objects
  - Views
  - View Reports
  - Reports
  - Sub Reports
  - Fields

Data Conversion

IO Creator Tool
- Integration Object
  - Integration Components
  - Integration Fields

XMLP Infrastructure Tasks
- Register Templates
- Generate XLIFF
- Associate Report to View
- Execute Report

Actuate Report Conversion Assistant

XML Data

Actuate Report Conversion Assistant

RTF Template

Execute Tasks

ACTUATE DESIGN

ACTUATE OUTPUT

XML Template

XML Data
Crystal Reports Conversion
Conversion Steps

Connection and Data Model Conversion

1. Data Connection
   - Data definition
     - SQL, Function, Stored Procedure
   - Parameters
   - Functions & Formulae
   - Crystal Report Data Components

2. Data Source
   - Data Model
     - SQL, Data Template
   - Parameters
   - Functions & Formulae
   - BI Publisher Data Components

Layout Conversion

3. XML Data
4. Blank RTF File / Crystal RTF output
5. Template Builder

RTF Template
Crystal Reports Conversion
Handling subreports

- Concatenated Data source
- Data Template
- Data Template + Hyperlink in RTF
- XSL subtemplates

Report
- subreports
  - Unlinked subreport
  - Linked subreport
  - On Demand subreport

Crystal Reports with sub reports

Parent - Child Relationship
Conditional / Parameter based layout display

BI Publisher
Agenda

• Oracle BI Publisher – Introduction
  – Why convert to BI Publisher?
• Conversion Strategies and Techniques
  – Oracle Reports Conversion
  – Actuate Report Conversion
  – Crystal Reports Conversion
• Oracle Reports Migration Experience
• Crystal Reports Migration Experience
Oracle Report Migration Experience

Benefits

• Multiple Formats/Editable Documents
  • Excel – runs the world
• Graphs/Graphic Support
• UTF8 – Support
  • Reports6i pdf output only supports ASCII character sets.
• Eliminate 3rd party solutions:
  • Check Printing
  • Barcoding
  • Multilingual
Oracle Report Migration Experience

Benefits

- Eliminate Duplication
- Enhanced SQL & PL/SQL Capabilities
  - Reports6i runs its own SQL/PLSQL engines
- Multiple Data sources
  - XML
  - Webservices
  - Different Databases
- Better Performance
  - Data Model is separate from format model
  - Access XML Data from any group
Oracle Report Migration Experience

Benefits

- Real-time reporting
  - Kick off and display BI Publisher Reports from OA Framework or Oracle Forms
- Rich Set of APIs – A Topic in itself
  - Document Delivery
  - Merging Documents
  - Bursting
  - Etc
Oracle Report Migration Experience
Conversion Challenges

- Format Triggers
  - Log file generated to show triggers
  - Format Template highlighted with red
- Logo’s - Need to have a strategy for future reporting
- Data Template Clean Up
Agenda

• Oracle BI Publisher – Introduction
  – Why convert to BI Publisher?
• Conversion Strategies and Techniques
  – Oracle Reports Conversion
  – Actuate Report Conversion
  – Crystal Reports Conversion
• Oracle Reports Migration Experience
• Crystal Reports Migration Experience
In 2007 Gallup moved from its Legacy CRM to Oracle CRM

Then:
- Crystal Reports
- Embedded in the CRM
- Over 200 reports

Now:
- BI Publisher
- Standalone
- Less than 30 reports
Gallup

Challenges
- Cumbersome report repository
- Duplicate reports with minor layout changes and to support multi-language

Requirements
- Event Docs: Surveys, Name Tags, Certificates
- Gantt Charts

Implementation
- RTF Templates
- Conditional Formatting
- Sub Templates
- 200 Crystal reports to 30 Publisher reports (85% reduction)
- 3 months w/ one f/t report developer
Appendix


• Siebel Reports 8.1.1 Bookshelf - [http://download.oracle.com/docs/cd/E14004_01/books/Reports/ReportsTOC.html](http://download.oracle.com/docs/cd/E14004_01/books/Reports/ReportsTOC.html)

• Actuate Conversion Assistant Download - [https://metalink3.oracle.com/od/faces/index.jspx](https://metalink3.oracle.com/od/faces/index.jspx) patch # 8288024

• “Converting reports from Business Objects Crystal Reports to Oracle BI Publisher” - [http://download.oracle.com/otndocs/xmlp/CrystaltoBIP.pdf](http://download.oracle.com/otndocs/xmlp/CrystaltoBIP.pdf)

• “Reports6i to BIP GUI Conversion Utilities” – Ike Wiggins’ Blog - [http://bipublisher.blogspot.com](http://bipublisher.blogspot.com)
For More Information

http://search.oracle.com

Oracle BI Publisher

or

http://www.oracle.com/technology/products/xml-publisher
ORACLE IS THE INFORMATION COMPANY