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Siebel Reporting: BI Publisher

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Product Manager – Siebel Reporting

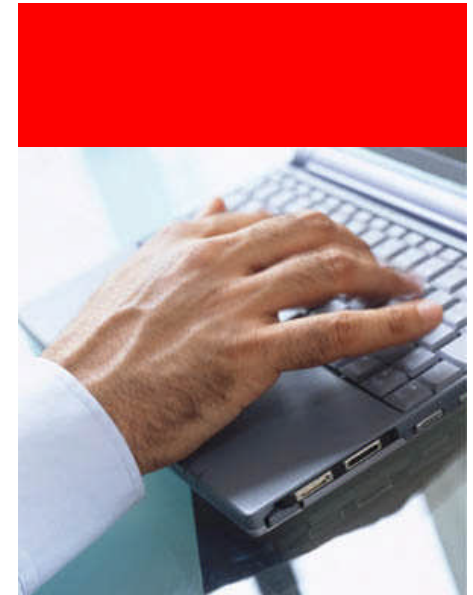
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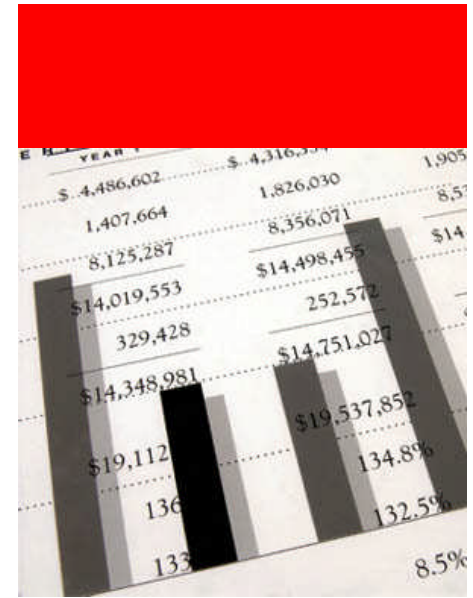
The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

Agenda

- Reporting Challenges
- BI Publisher Integration Benefits
- Demonstration
- What's coming ...
- Q&A



Reporting Challenges





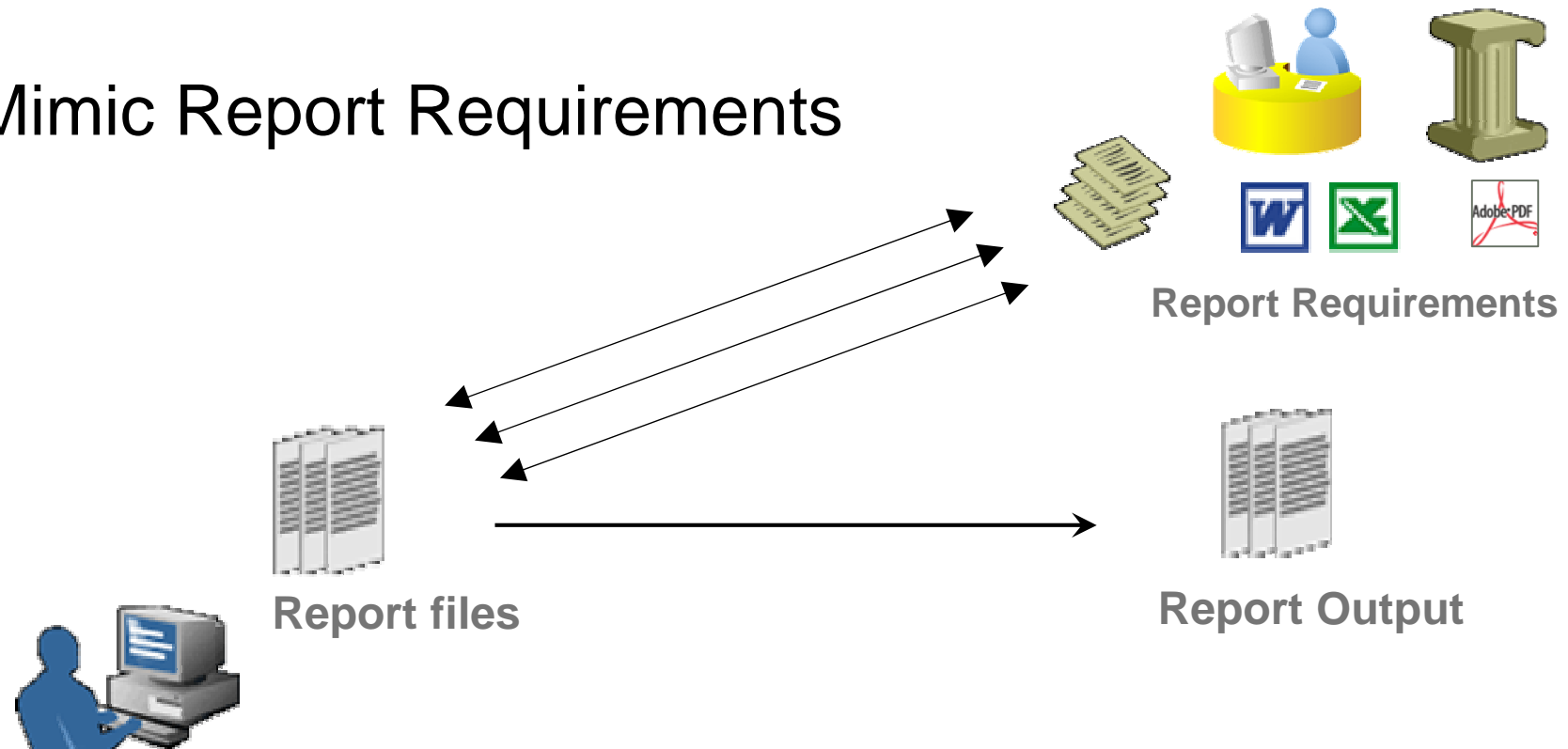
Reporting Challenges

Actuate Integration

- Complicated report development tool requires a Developer
- End users can't create their own layouts
- Clumsy report administration (recompile SRF; restart server)
- Limited output formats
- Dependency on 3rd party software
- Scalability, performance, high availability

Actuate Report Development

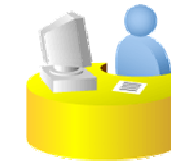
Mimic Report Requirements



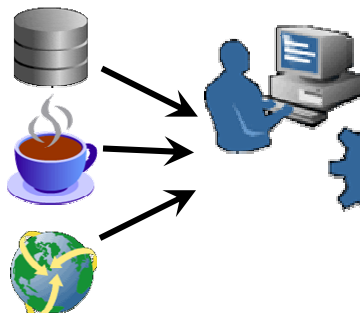
Must be same geometry, font, margin size, etc.

BI Publisher Report Development

- Familiar desktop tools for layout customization
- Reduce development cost
- Empowering business users



Report Templates



Data Sources



Formatting Engine



Report Output

✓ Rapid Deployment



Report Deployment Process

Actuate (Developer):

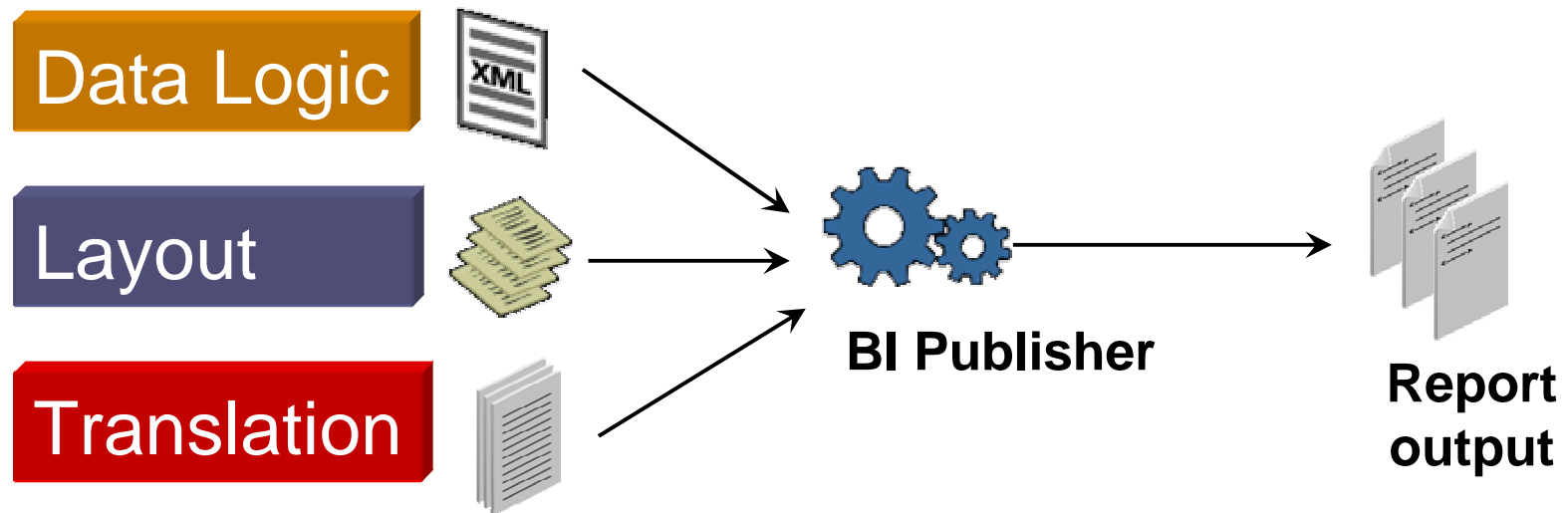
- Generate Report Object Library
- Create report in Actuate
- Compile report
- Deploy report executable
- Associate report with View and Deploy SRF

BI Publisher (End User):

- Generate XML data
- Create report Layout Template in Word
- Upload Template
- Associate with View
- * Don't need to compile report
- * No restart of server

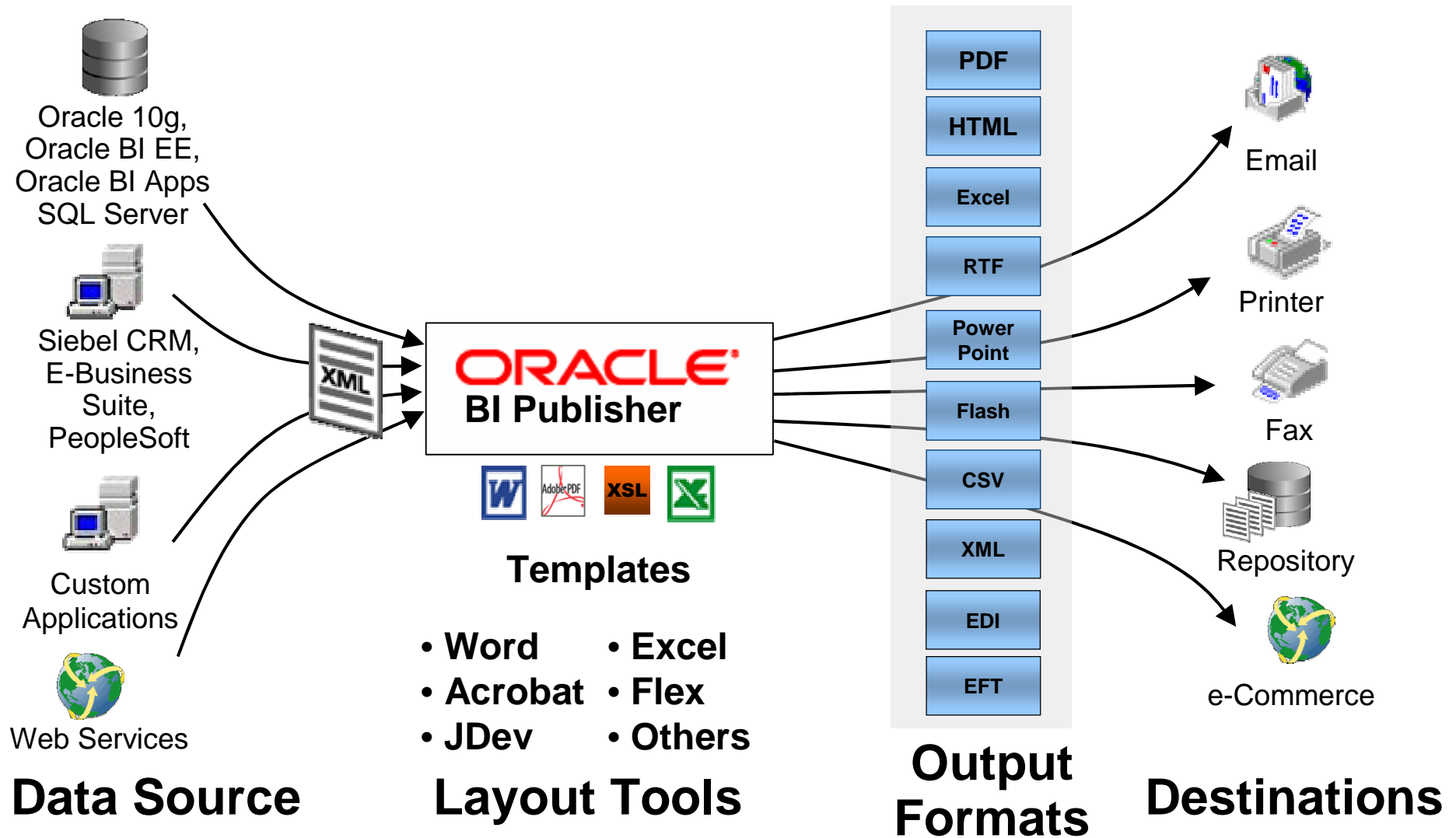
BI Publisher Report Maintenance

Separate query, layout, and translation

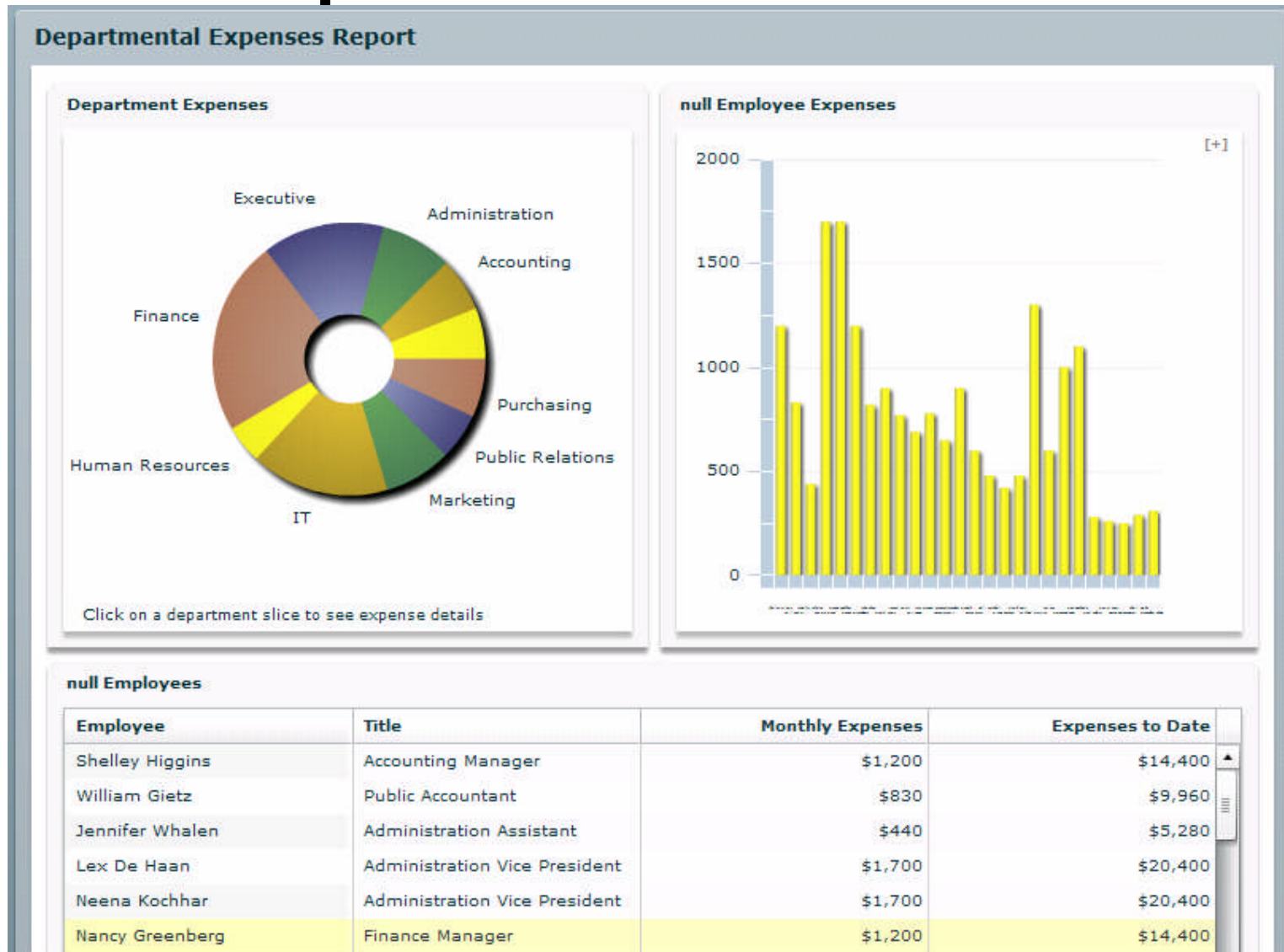


- ✓ Reduced maintenance cost
- ✓ Flexibility in deployment

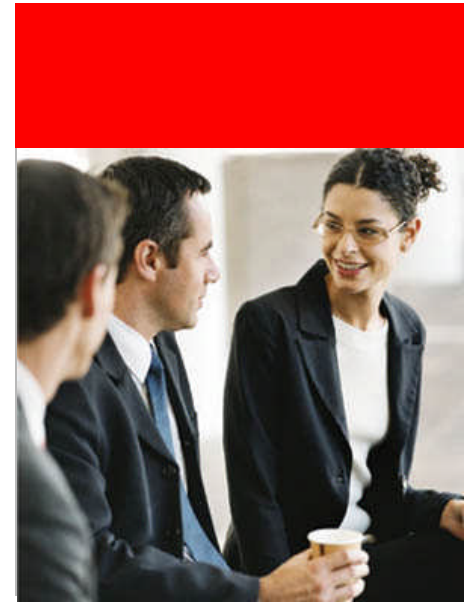
Runtime Report Generation



Flash Reports



BI Publisher Integration Benefits











BI Publisher Integration Benefits

- Use common desktop tools to create report layouts
- End users can create their own layouts
- Easy report layout deployment and administration
- End user chooses output format (PDF, RTF, Excel and HTML)
- Use Oracle's strategic enterprise reporting tool (used in E-Business Suite, PSFT, JDE, BI EE, and others) and remove dependency on Actuate
- Reduced TCO

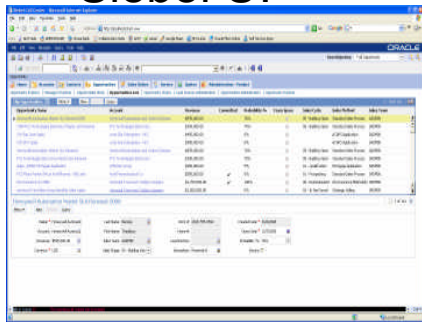
Actuate vs. BI Publisher – General

Feature	Actuate	BI Publisher
Report Authoring Tools	Proprietary development environment IT/Engineering Skills	MS Word add-in Easier to use Business Analyst Skills 
Report Localization	Proprietary file formats. Localizable content embedded within report template	Standards-based (XLIFF). Localizable content decoupled from report template 
Report Server Administration & Upgrade	Separate server environment. Complex administration such as user synchronization and etc. Upgrade is expensive and high risk due to lack of a patch installer.	Independent BI Publisher server easier to upgrade as J2EE application 
Report Deployment	Require SRF compilation. ROX deployment in Report Server by IT.	No SRF changes. Deployment in application by administrator. 
User Experience	Reports run from Siebel UI	Similar to Actuate in a Siebel environment 
Multiple Business Objects	Supports report execution from multiple business objects, but not generation	Multiple business objects feature 

Reporting Solutions with BI Publisher

**Embedded Siebel
BI Publisher Engine**

- Siebel UI



BI Publisher Engine



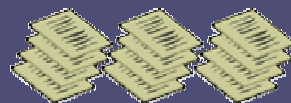
XSL

- 8.1 BIP Integration
- 5.6.3 BIP Core Libraries

**BI Publisher Server
with Siebel**

BI Publisher Client

BI Publisher Engine



XSL

Web Services

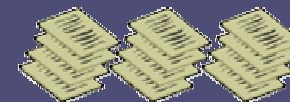
**Siebel
Application**

- Siebel 8.0, 7.8, 7.7
- BIP 10.1.3.x

**BI Publisher Server
Siebel & OBIEE**

BI Publisher Client

BI Publisher Engine



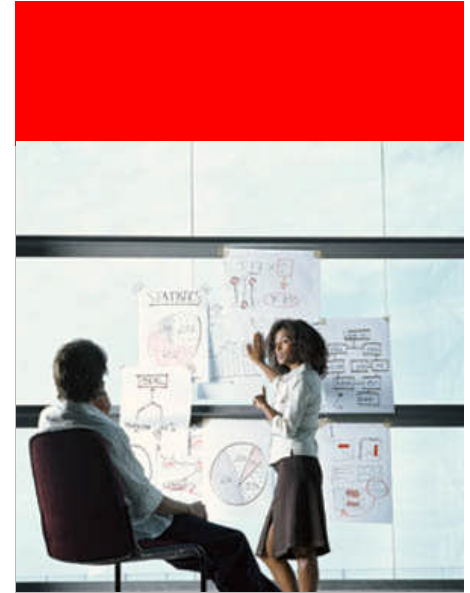
XSL

OBIEE Server

**Any Siebel
Version Data**



Demonstration



Users View - Running Reports

Running the Report

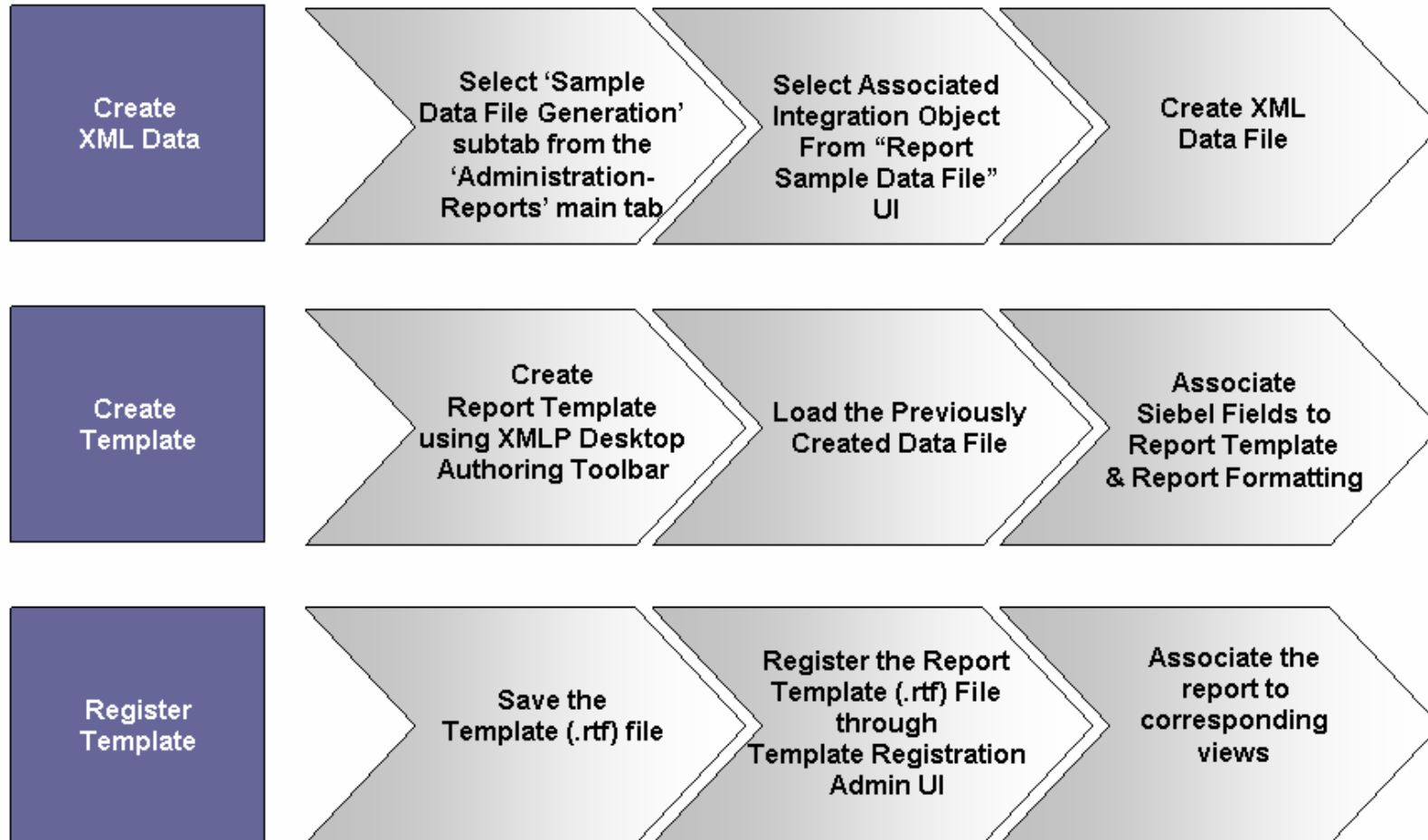


Account List

Zebra Electronics	Location	Boston - Manufacturing Plant	Main Phone No.	(617)964-1241	Main Fax		
Address	Comments		Acct Type	Status	Industry	Parent Acct	Synonyms
1 Summit St.			Supplier	Active	Electric, Gas & Sanitary Services		
Boston							
MA	02215	USA					
Zebra Electronics	Location	HQ	Main Phone No.	(203)655-8475	Main Fax		
Address	Comments		Acct Type	Status	Industry	Parent Acct	Synonyms
1456 Connecticut Lane			Supplier	Active	Electric, Gas & Sanitary Services		
Hartford							
CT	04451	USA					
Zebra Electronics	Location	Tokyo	Main Phone No.	(+03)983-0193x83	Main Fax		
Address	Comments		Acct Type	Status	Industry	Parent Acct	Synonyms
4759 Holiday St			Supplier	Active	Electric, Gas & Sanitary Services		
Los Angeles							
CA	38404572	USA					
Zebra Freight (Japan), Inc.	Location	Tokyo	Main Phone No.		Main Fax		
Address	Comments		Acct Type	Status	Industry	Parent Acct	Synonyms
5-1, Kita-Aoyama 2-chome			Supplier	Active	Electric, Gas & Sanitary Services		
Minato-ku							
Tokyo							
	107-77	Japan					
Zeefer Technologies	Location	San Francisco	Main Phone No.	(415)336-8000	Main Fax		
Address	Comments		Acct Type	Status	Industry	Parent Acct	Synonyms
			Customer	Active			

Developers View – Creating Reports

Sales Admin Report Administration Flow





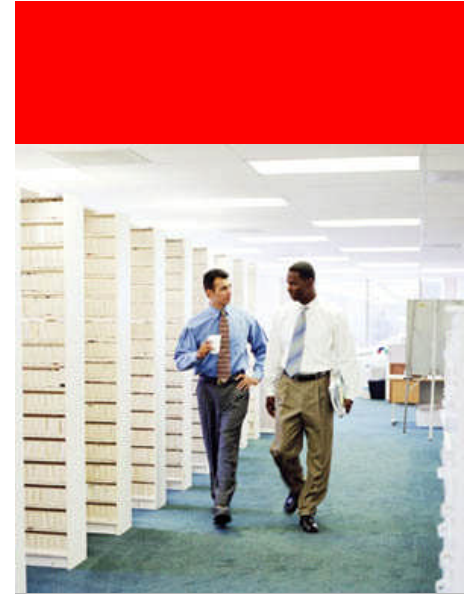
Opportunity List Report Demo

Account	Name	Win %	Sales Stage	Revenue
Acme Western Division	Don't let your jewels be stolen - Mary L Callahan	0%		0
Atherton Group	Paul Agee Checking Account	0%	Data Entry	0
Bancroft Industries	Keep Afloat - Frank Chandler	0%		0
Erikson Auto Supply	Erikson - Cash Management	25%	06 - Agreements Executed	10000
Gottlieb Manufacturing	Keep Afloat - William Edward Jr. T Boblick	0%		0
Jensen Controls	Branford - \$5k Easy Loan	90%	03 - Qualification	1500
NAPA Auto Parts	Don't let your jewels be stolen - Juan D'Amico	0%		0
Patisserie Nouvelle, Cie.	Patisserie - Checking/ Loan	30%	03 - Submitted	2500
Toshiba	El Nino Homeowners Coverage - Mark L Davidson	0%	02 - Potential Lead	0
Wayne Wright Industries	Erikson - Consumer Account	80%	02 - Application	1000

Count	10
Total	15000
Average	1500



What's coming ...





8.1 integrated solution

- BI Publisher integrated into Siebel CRM
- Similar End User flow with choice in output type
- Over 100 BI Publisher reports provided out of the box e.g.
 - 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



Planned enhancements summary

- Loosely coupled integration with BI Publisher Enterprise
 - Scale report servers independent from CRM servers
- Wider range of delivery channels
 - email, printer, fax, WebDAV, ftp
- Scheduling and Bursted reports
- Wider range of Template types and output formats
 - Flash, PPT, eText, PDF Forms
- Actuate to BI Publisher Conversion Utility
- BI Publisher for all document generation (i.e. Proposals)



Review

- **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)
 - Multiple data source
- **Oracle's strategic enterprise reporting tool**
 - Based on industry standards (XLIFF, XML)
- **Improved Support**
 - Single vendor
- **Reduced TCO**
 - Development, deployment, administration, upgrade




Siebel BI Publisher @ OpenWorld

- mix.oracle.com
- **Meet The Experts**
 - Wednesday, 12pm – 2pm, Lobby of Moscone West - 2nd floor
- **DEMOgrounds**
 - Pod D13 - Business Intelligence
- **Recommended BI Publisher Sessions**
 - Monday, 11.30-12.30 (S299587) – Introduction to BI Publisher
 - Monday, 17.30-18.30 (S298463) – What's new in BI Publisher
 - Wednesday, 11.30-12.30 (S299629) – Converting Reports
 - Wednesday, 13.00-14.00 – (S299588) – BI Publisher Roadmap



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