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 use ......

- JD Edwards EnterpriseOne?
- JD Edwards World?
- PeopleSoft Enterprise?
- E-Business Suite?
  - 11i or 12
- Siebel?
- Others?
Program Agenda

- Why use BI Publisher?
- How do I build a layout?
- Demo
- How can I use it in my application?
- What does BI Publisher Enterprise offer?
- Questions & Answers
Complete: For All Your Reports and Business Documents

- Invoices
- Purchase Orders
- Correspondence
- Financial Statements
- Checks
- Shipping Labels
- Government Forms
- EFT & EDI
- Operational Reports
- Interactive Reports
BIP Architecture = Simplified Report Maintenance

Separate Data Logic, Layout, and Translation Benefits

- Greater flexibility and reuse
- Fewer reports are easier to maintain
- Optimize data extraction and document generation process
Gallup

Challenges:
• Cumbersome report repository
• Duplicate reports with minor layout changes and multiple translations

Requirements
• Event Docs: Surveys, Name Tags, Certificates

Results
• 200 Crystal reports to 30 Publisher reports (85% reduction)
Faster & Easier Development

MasterCard Worldwide

Challenges
• 90 days and 3 people (incl. 3rd party vendor) to implement POs
• 50 Operating Units
• Vendor Country Terms and Conditions
• Send PO by Email or Fax

Results
• RTF layouts designed by Business Analysts
• 3 days and 1 person to implement POs
• 12x faster w/ 1/3 fewer people
## BI Publisher Delivered with Oracle Applications

### Limited Use License

<table>
<thead>
<tr>
<th>Applications Unlimited Product</th>
<th>First Available in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle E-Business Suite</td>
<td>Release 11.5.10</td>
</tr>
<tr>
<td>PeopleSoft Enterprise</td>
<td>PeopleTools 8.48</td>
</tr>
<tr>
<td>JD Edwards EnterpriseOne</td>
<td>Tools Release 8.96</td>
</tr>
<tr>
<td>JD Edwards World</td>
<td>Release A7.3</td>
</tr>
<tr>
<td>Oracle Siebel</td>
<td>Release 8.1.1</td>
</tr>
</tbody>
</table>
BI Publisher with Many Oracle Products

- 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 Application Express (APEX)
- Oracle SOA Governance
- Oracle Retail
- Oracle Global Risk & Compliance
- iFlex FLEXCUBE – IFLEX Reinsurance
- Oracle FLEXCUBE Lending and Leasing
- Oracle Communications Applications
- Oracle Transportation Management
- Oracle Insurance Insbridge Rating and Underwriting
- Enterprise Manager - Configuration Change Console
- Oracle Primavera Enterprise

And… don’t forget Oracle Fusion Applications
BI Publisher – One Environment …

- A complete reporting solution
- Architecture simplifies maintenance
- Easy-to-use tools empower business users
- Already included with many Oracle products

- Removes Complexity
- Reduces Maintenance Cost
Program Agenda

- Why Use BI Publisher?
- How Do I Build a Template?
- Demo
- How Can I Use It with My Application?
- What Does BI Publisher Enterprise Offer?
- Questions & Answers
Layout
Defines how your data is displayed
Supported Layout Types

**All Applications**

- Microsoft Word (RTF)
- Adobe Acrobat (PDF)
- XSL-FO
- eText

**Enterprise Applications**

- Layout Editor
- Excel
- Flash
Design Layouts by Mapping Data to Location in Template

2006 Sales

March Sales

<table>
<thead>
<tr>
<th>Category</th>
<th>Sales (In thousand USD)</th>
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</thead>
<tbody>
<tr>
<td>Motor vehicle &amp; parts dealers</td>
<td>$73,468</td>
</tr>
<tr>
<td>Furniture &amp; home furnishings stores</td>
<td>$8,655</td>
</tr>
<tr>
<td>Electronics &amp; appliance stores</td>
<td>$7,254</td>
</tr>
<tr>
<td>Building material &amp; garden eq. &amp; supplies dealers</td>
<td>$2,785</td>
</tr>
<tr>
<td>Food &amp; beverage stores</td>
<td>$5,854</td>
</tr>
<tr>
<td>Health &amp; personal care stores</td>
<td>$16,577</td>
</tr>
<tr>
<td>Gasoline stations</td>
<td>$6,167</td>
</tr>
<tr>
<td>Clothing &amp; clothing accessories stores</td>
<td>$18,917</td>
</tr>
<tr>
<td>Sporting goods, hobby, book &amp; music stores</td>
<td>$6,952</td>
</tr>
<tr>
<td>General merchandise stores</td>
<td>$41,492</td>
</tr>
<tr>
<td>Miscellaneous store retailers</td>
<td>$8,761</td>
</tr>
<tr>
<td>Nonstore retailers</td>
<td>$18,353</td>
</tr>
<tr>
<td>Food services &amp; drinking places</td>
<td>$31,164</td>
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</table>

February Sales

<table>
<thead>
<tr>
<th>Category</th>
<th>Sales (In thousand USD)</th>
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<tbody>
<tr>
<td>Motor vehicle &amp; parts dealers</td>
<td>$71,654</td>
</tr>
<tr>
<td>Furniture &amp; home furnishings stores</td>
<td>$8,655</td>
</tr>
<tr>
<td>Electronics &amp; appliance stores</td>
<td>$7,254</td>
</tr>
<tr>
<td>Building material &amp; garden eq. &amp; supplies dealers</td>
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<td>$5,854</td>
</tr>
<tr>
<td>Health &amp; personal care stores</td>
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<td>$41,492</td>
</tr>
<tr>
<td>Miscellaneous store retailers</td>
<td>$8,761</td>
</tr>
<tr>
<td>Nonstore retailers</td>
<td>$18,353</td>
</tr>
<tr>
<td>Food services &amp; drinking places</td>
<td>$30,803</td>
</tr>
</tbody>
</table>
Layout Design Tools

Template Builder for Microsoft Word Add-in

- Load Data
- Insert Components
- Preview
- Validate

Invoice

Invoice Address

<?C_BILL_TO_CONCATENATED?>
Layout Design Tools
Adobe Acrobat Professional

- Assign Same Name From Element in Data to PDF Form Fields
Desktop Template Viewer

- BI Publisher Desktop includes the BI Publisher engine
- Test all your templates from your desktop using sample data
- Apply XLIFF translation files
- Creates log file for debugging
Web-Based Layout Editor
Available for Enterprise Applications
Demonstration

• Create and run an RTF template
  – Leverage Microsoft Word
  – BI Publisher’s Template Builder for Word Add-in
  – Sample Data from your report
• Create and run a PDF template
  – Use Adobe Acrobat Professional
  – Sample Data from your report
  – BI Publisher’s Template Viewer to test on your desktop (optional)
Program Agenda

- Why Use BI Publisher?
- How Do I Build a Template?
- Demo
- How Can I Use It with My Application?
- What Does BI Publisher Enterprise Offer?
- Questions & Answers
JD Edwards EnterpriseOne

• How Is It Integrated?
• How Do I Use It?
• More Information?
## JD Edwards EnterpriseOne Releases
### Limited Use License

<table>
<thead>
<tr>
<th>Release</th>
<th>What’s Included</th>
</tr>
</thead>
</table>
| Tools Release 8.96    | Embedded version  
                        Enables you to develop your own templates                             |
| Tools Release 8.98    | EnterpriseOne JDBC Driver  
                        Connects to BI Publisher Enterprise server                             |
Interactive Reporting with BI Publisher
Requires Tools 8.98

Layout Templates

JDBC Driver

JDE EnterpriseOne

Layout Tools

Output Formats

Destinations

PDF
HTML
Excel
PowerPoint
Flash
RTF
CSV
XML
EDI/EFT
Interactive

Email
Printer
Fax
Repository

ORACLE
# When to Use Embedded or Interactive

## 8.98 Tools Single BIP Solution, Different Use Cases

<table>
<thead>
<tr>
<th>Embedded</th>
<th>Interactive</th>
</tr>
</thead>
<tbody>
<tr>
<td>• An event in JDE E1 triggers the report</td>
<td>• An event outside of JDE E1 triggers the report</td>
</tr>
<tr>
<td>• Need to update data in the database</td>
<td>• Read-only data</td>
</tr>
<tr>
<td>• Data manipulation</td>
<td>• Minimal data manipulation</td>
</tr>
<tr>
<td>• No user action</td>
<td>• On demand</td>
</tr>
</tbody>
</table>

---

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Embedded Setup and Report Process

**SETUP**
- Install BI Publisher Desktop

**USER PROCESS**
1. Upload blank RTF template to the XML Publisher Object Repository
2. Create a Report Definition To associate the UBE With the template
3. Submit the report to Generate the XML data
4. Download data and Design template
5. Upload Final Template
6. Run UBE to generate BIP Report
Interactive Setup and Report Process

**SETUP**

- Install BI Publisher Enterprise
- Install and configure the data Access (JDBC) driver
- Install BI Publisher Desktop

**USER PROCESS**

1. Log in through BI Publisher
2. Create a Data Model (query) and generate data
3. Create Report Definition

**Decision Point**

- **Use layout editor?**
  - **Yes**
    - Launch Layout Editor, Design and Save Layout
    - View Report in BI Publisher
  - **No**
    - Download data and Design template
    - Upload Final Template
One View Reporting
Operational Reporting Solution Designed for End Users

**What**
- Intuitive reporting solution enables end users to access and personalize transaction data into lists, charts, graphs and tables
- Large library of pre-defined reports designed to answer the most common business questions

**Why**
- Providing end users access to the right data, in real time, leads to more effective decision making and improved productivity

**How**
- Intuitive report creation leverages Interactive query applications powered by Oracle BI Publisher
  - Supports all EnterpriseOne modules
  - Supports custom EnterpriseOne query applications
- Purpose built applications and reports

**Results**
- Report creation empowers end users, provides improved decision making, and reduces IT costs

#1 User Group Request
One View Reporting
Operational Reporting Across the Enterprise

One View Applications Content

- Project Costing
- Sales Order Management
- Capital Asset Management
- Service Management
- Payroll
- Financials
- Manufacturing Management
- Inventory Management
- Procurement and Subcontract Management
- Real Estate Management
- Human Resources

Standard EnterpriseOne Applications

Data Browser

Custom EnterpriseOne Applications

One View Foundation

Oracle BI Publisher

JD Edwards EnterpriseOne
For More Information
BI Publisher for JD Edwards EnterpriseOne

Start Here:
www.support.oracle.com
Search for Article ID: 789074.1

One View Reporting:

JD Edwards World

• How Is It Integrated?
• What Are the Features?
• More Information?
How Is It Integrated (A9.2)

Electronic Document Delivery is BI Publisher Gateway

- Uses Data Output from World Writer and DREAM Writer
- Combines that data with your report template
- EDD contains the BI Publisher APIs
  - No installation of BI Publisher is needed
- What’s new:
  - More programs have been enabled for EDD
  - Java EDD for 11g with World A9.2 Update 1
Integration in A7.3 and A8.1

Use BI Publisher to Connect to World as Data Source

- Write a Query in BI Publisher to Generate the Data
  - The JDBC Driver enforces World security
- Create Report Template and Upload to BIP (or use Layout Editor)*
- Run Your Report in BI Publisher

*JDBC Driver 2.2 available in A9.2.1 to connect to 11g
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
Sample Templates Provided
JD Edwards World
For More Information
JD Edwards World

Start Here:
www.support.oracle.com
Search for Article ID: 789078.1
BI Publisher for JD Edwards World
PeopleSoft Enterprise

- How Is It Integrated?
- How Do I Use It?
- What Are the Features?
- More Information?
How Is It Integrated?

PeopleSoft Pure Internet Architecture pages for:

- Defining data sources
- Creating report definitions
- Managing templates
- Managing translations
- Viewing report output
How Do I Use It?

SETUP

- Install BI Publisher Desktop

USER PROCESS

1. Create and register the Data source*
2. Generate sample XML
3. Download data and Design RTF template
4. Create the Report Definition:
   - Associate data source with template
   - Define Output options
   - Grant security
   - Define Bursting
5. Upload Template
6. Run Report

*Data can come from PS Query, SQR, Application Engine, PeopleCode or File Layout

See Appendix for details
Start Here:
www.support.oracle.com
Search for Article ID: **1127534.1**
Oracle's PeopleTools 8.51 Documentation Home Page

Also see: Enterprise PeopleTools 8.51 PeopleBook: XML Publisher for PeopleSoft Enterprise
E-Business Suite

- How Is It Integrated?
- How Do I Use It?
- What Are the Features?
- More Information?
E-Business Suite Releases

Limited Use License

- First Embedded Version Delivered with 11.5.10*
  - 500 Templates delivered across products
  - Mostly Built on Oracle Reports
- In Release 12.1 All Reports Are BI Publisher
  - 2800 Templates
  - 2092 Data Sources (BI Publisher Data Templates)
  - Across 95 Products

* Available as a patch for earlier versions
Release 12.1.3 Highlights
Integration with BI Publisher Delivery Manager!

- Reports can be automatically e-mailed, faxed, sent to an IPP Printer, or delivered using FTP or SFTP
- Set up IPP in the System Administration Interface for Print and Fax
- For e-mail, Use Profile Options
  - FND: SMTP Host
  - FND: SMTP Port
  - to set hostname and port of mail host
- FTP/SFTP Defined at submission
E-Business Suite Setup and Process*

** USER PROCESS **

1. Create Data Template**
2. Create a concurrent Program that calls XDO executable
3. Register data definition in Template Manager with same shortname
4. Upload Data Template to Data Definition

"Details in appendix"

** Oracle Reports can also be used as data source**
Conversion Assistant

Conversion Assistant

RDF XML

Or

Oracle Report RDF files

Oracle Reports 9i rwconverter

Target Directory

Data Template

RTF Template

Log files

PLS files

Manually Upload to Template Manager

Manually Compile

Data Template

RTF Template

E-Business Suite Template Manager
E-Business Suite 11g Integration

Choose Responsibility When Logging in to BIP

- Log in using EBS credentials
- Select/Change Responsibility
- Select/Change Reporting Organization (multi-org support added in 11.1.1.6)
- EBS Security Enforced
E-Business Suite 11g Integration

E-Business Suite Automatically Configured as Data Source

- Write queries against E-Business Suite Applications tables
- Combine with data from other sources
- Support for Flexfields and PL/SQL Event Triggers built into data model design
Support EBS Flexfields as Parameters

Planned Feature

- Define parameters based on Flexfields in Data Model Editor
- Support parameters based on Flexfields in Report Viewer, Scheduler
- Support for Key Flexfields not Descriptive Flexfields

VALUE: More E-Business Suite customers will be able to create and run more reports on BI Publisher Enterprise.
Convert EBS Catalog to BI Publisher

Planned Feature

- Converts XML Publisher Data Templates to Publisher 11g Data Models
- Creates an 11g report to hold layouts
- Uploads directly to catalog

VALUE: EBS customers can move any or all of their reporting to BI Publisher Enterprise
Enterprise Conversion Assistant

**Conversion Assistant**
- RDF XML

**Target Directory**
- Data Model
  - Report
  - RTF
- Log files
- PLS files

**BI Publisher Server**
- Report
- Data Model
- RTF Layout
- XPT Layout

**Automatic Upload to catalog**
- Coming soon

**Oracle Reports 9i rwconverter**
Siebel CRM

- How Do I Use It?
- What Are the Features?
- What’s Coming?
Steps for Creating a BI Publisher Report

1. From Admin View
   Generate XML Data

2. Create Template

3. Upload Template

4. Associate with Integration Object

5. Associate report with a View

6. Run Report
Key Enhancements

8.1.1.5 Fix Pack

- Security enhancements, most security & topologies possible
  - LDAP, ADSI, OSSO, BI Security, BI Publisher Security, SSL, Siebel Security WS
- New Parameterized reporting feature
- Select records reports (parent, child, multi select row)
- Template and reports sharing by position or organization
- Complete multilingual reporting solution
  - Multilingual reports from a single language Application Object Manager (server component)

8.1.1.5 solution also available in 8.0.0.12 and 8.2.2.
Future Enhancements

8.1.1.6 - Forward

- Enhanced My Reports view
- Administration reports from My Reports View
  - Report usage, per user, performance statistical analysis
  - System Administration reports
- Report Business Service enhancements
  - Delivery channels, scheduling,
  - bursting, attach to entity
Program Agenda

- Why use BI Publisher?
- How do I build a layout?
- How can I use it with my application?
- What Does BI Publisher Enterprise Offer?
- Questions & Answers
## Integration with Enterprise 11g

### By Application

<table>
<thead>
<tr>
<th>Applications Unlimited Product</th>
<th>11g Integration Status</th>
</tr>
</thead>
</table>
| Oracle E-Business Suite       | EBS Security Available, Support for multi-org (Reporting Organization) added in 11.1.1.6  
|                               | Flexfield as Parameters Enhancements (planned)  
|                               | EBS to Catalog Conversion Utility (planned) |
| PeopleSoft Enterprise         | Integration planned |
| JD Edwards EnterpriseOne (8.48.4) | OneView Reporting  
|                               | JDBC driver supports 11g (11.1.1.6) |
| JD Edwards World              | JDBC Driver (2.2) supports 11g (11.1.1.6) |
| Oracle Siebel                 | Already uses 10g server, integration planned with 11g |
Online Layout Editor

- Drag and drop report elements
- Create layouts within your browser
- Supports same outputs as RTF
Interactive Reports

Features

- Collapsible regions to focus on the data you want to see
- Pop ups to see detail data over graphs and charts
- Ability to select different values for repeating sections
- Excel-style filtering and sorting in tables and pivot tables
- Fixed headers and total rows with scrolling data
BI Publisher Enterprise Added Benefits

- Layout Tools
  - Online Layout Editor
  - True Excel Templates
- Data Model Editor
- More Data Sources
  - CSV Files (planned), Local Excel files; combine with corporate data
  - Web services, BI Analyses, LDAP, OLAP, HTTP
- Output
  - Interactive -- PDF/A
  - Mobile -- PDF/X
BI Publisher Trial Edition
Downloads and installs in about 60 minutes

- Fully-functional evaluation version
  BI Publisher Enterprise 11.1.1.6.0
- Includes self-contained WebLogic
  Server and Java Derby database
- Full suite of sample reports
- Connect to your data sources and
  delivery servers to try it on your data
today

Available from OTN
## More Good Stuff

**BI Publisher Demo Pod: Moscone South, right - S262**

<table>
<thead>
<tr>
<th>What</th>
<th>Where</th>
<th>When</th>
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<tbody>
<tr>
<td>CON9514: Oracle BI Publisher Best Practices</td>
<td>Moscone South - 305</td>
<td>Wed 3-Oct 3:30 - 4:30 pm</td>
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<tr>
<td>HOL10461: Building Reports and Data Models in Oracle BI Publisher</td>
<td>Marriott Marquis - Salon 5/6</td>
<td>Thr 4-Oct 11:15 - 12:15 pm</td>
</tr>
</tbody>
</table>

http://www.oracle.com/technology/products/xml-publisher
Stay Connected with BI Publisher

http://www.oracle.com/technetwork/middleware/bi-publisher/overview/index.html
Appendix

Application-specific steps

- PeopleSoft
- E-Business Suite
**Process for PeopleSoft**

**SETUP**
- Install BI Publisher Desktop

**USER PROCESS**
1. Create and register the Data source*
2. Generate sample XML
3. Download data and Design RTF template
4. Create the Report Definition:
   - Associate data source with template
   - Define Output options
   - Grant security
   - Define Bursting
5. Upload Template
6. Run Report

---

*Data can come from PS Query, SQR, Application Engine, PeopleCode or File Layout*
Create Data Source and Generate XML Data

XML data can be input using a variety of means, including: PS Query, SQR, Application Engine, PeopleCode, or File Layout.
Load the sample XML data to the Template Builder to design the report layout.
Create the Report Definition

Report definitions are used to:
- Associate a data source with a template
- Define output options
- Grant security to view report
- Define bursting options
Run Your BI Publisher Report

Run report via:
- Query Report View
- Query Report Scheduler
- Online PeopleCode
- Batch PeopleCode
E-Business Suite Details
**E-Business Suite Setup and Process**

**DEVELOPMENT SETUP**
- Create Data and Layout Template Files
- Load files to Template Manager
- Define concurrent program using the data engine executable
- Add concurrent program to Request Group

**USER PROCESS**
- Choose concurrent program via SRS forms
- Select parameter values
- Select layout, language, and output format
- Select DeliveryOpts
  - Submit Request
  - Output document generated
  - Output document delivered

*New in 12.1.3!
Create Data Template

- The data template tells XMLP the query to execute and the structure to return. It consists of:
  - A `<parameters>` section to define parameters, their data types and default values
  - A `<dataQuery>` section to define the SQL query to execute
  - A `<dataStructure>` section to define the output structure for the results
Create Layout Template
Register Data Definition

1. Use XML Publisher Administrator responsibility
2. Create data definition
3. Load sample data (and schema for PDF layouts)
4. Load data template file
Register Layout Template

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

1. Use System Administrator responsibility

2. Create a concurrent program definition using the XML Publisher Data Template executable

3. The **Short Name** must match the **Data Definition Code**
Add the Program to a Request Group

- Security > Responsibility
  - Request
Run the Report

- User Selects the Report From a List and Clicks Options
Select Template, Language, Format

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

- Delivery Options set up in the System Administration pages
- Supports Printer, Email, Fax, FTP
- Do not select printer in previous form
View Final Output

Monitor Requests Form