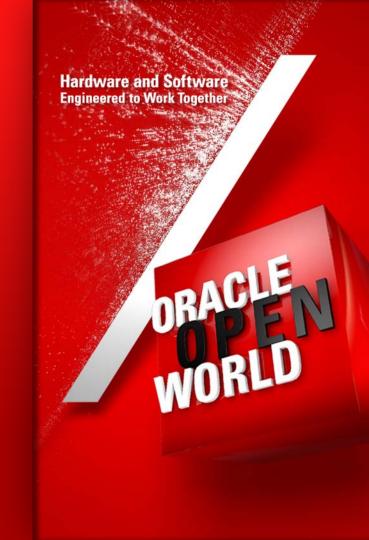
# ORACLE®

### **ORACLE**

# Oracle BI Publisher: Reporting for Oracle Applications

Mike Donohue Director, BI Product Management



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** 

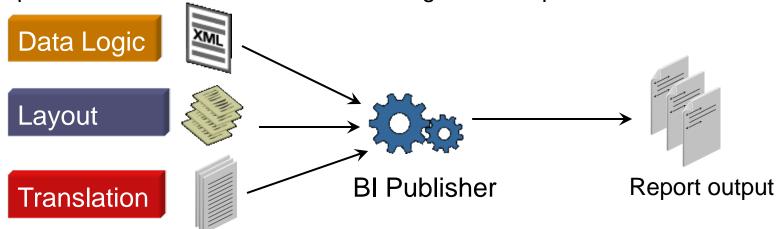
- ✓ Invoices
- ✓ Purchase Orders
- √ Correspondence
- √ Financial Statements
- √ Checks
- ✓ Shipping Labels
- √ Government Forms
- ✓ FFT & FDI
- √ Operational Reports
- ✓ Interactive Reports



### **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



### **Better Managed**



#### Gallup

#### **Challenges:**

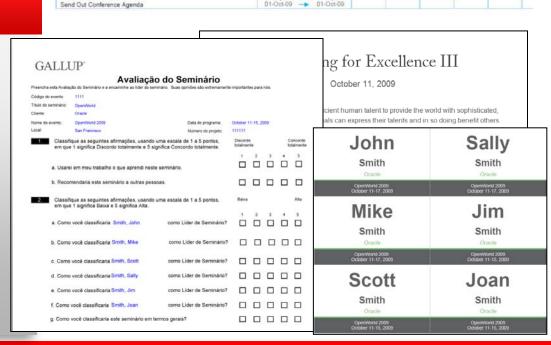
- Cumbersome report repository
- Duplicate reports with minor layout changes and multiple translations

#### Requirements

 Event Docs: Surveys, Name Tags, Certificates

#### Results

 200 Crystal reports to 30 Publisher reports (85% reduction)



Start

Task Name

Open World 2009

Book Venues

Conference Planning

Schudule Presenters

Scheduled

Finish

D1-Jan-09 - 11-Oct-09

01-May-09 -> 30-Sept-09

01-Sept-09 - 10-Oct-09 24-Feb-09 - 10-Mar-09

12-Sept-09 -> 20-Sept-09

January Feburary

March

### **Faster & Easier Development**



#### **MasterCard Worldwide**

#### Challenges

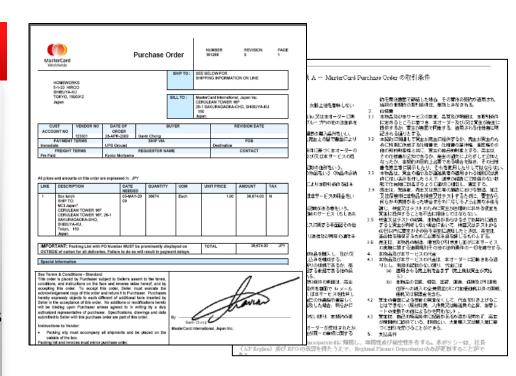
- 90 days and 3 people (incl. 3<sup>rd</sup> party) vendor) to implement POs
- 50 Operating Units

#### Requirements

- 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

<b>Applications Unlimited Product</b>	First Available in
Oracle E-Business Suite	Release 11.5.10
PeopleSoft Enterprise	PeopleTools 8.48
JD Edwards EnterpriseOne	Tools Release 8.96
JD Edwards World	Release A7.3
Oracle Siebel	Release 8.1.1

### **BI Publisher with Many Oracle Products**

- **Oracle Identity Management**
- Oracle Life Sciences AFRS
- 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

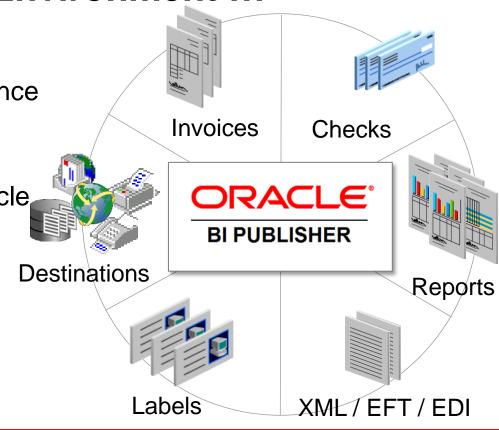
Architecture simplifies maintenance

 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

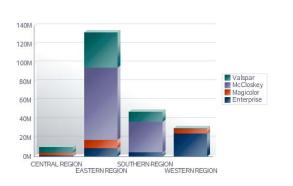


### Layout

### Defines how your data is displayed



BRAND	REGION	DISTRICT	REVENUE
Enterprise	EASTERN REGION	YOUNGSTOWN DISTRICT	7,798,224
		REGION TOTAL	7,798,224
Magicolor	CENTRAL REGION	KANSAS CITY DISTRICT	2,671,080
		REGION TOTAL	2,671,080
EASTERN REGION	BOSTON DISTRICT	4,375,600	
		PHILADELPHIA DISTRICT	2,546,132
		REGION TOTAL	6,921,732
McCloskey	SOUTHERN REGION	ATLANTA DISTRICT	5,231,612
		REGION TOTAL	5,231,612
Valspar SOUTHERN REGION		CHARLOTTE DISTRICT	293,986
		JACKSONVILLE DISTRICT	6,262,444
		GRAND TOTAL	37,439,010



#### ORACLE!

500 Oracle Parkway Redwood Shores, CA 94065

#### **Detailed Revenue Report**

#### Year 1998 Revenue

The total revenue for year 1998 is 37,439,010.00.

#### **Product Category COATINGS**

The total revenue for the product category COATINGS is 37,439,010.00.

The total revenue for the brand Enterprise is 7,798,224.00.

Region	District	Revenue (USD)
EASTERN REGION	YOUNGSTOWN DISTRICT	7,798,224.00
	Total	7,798,224,00

#### Magicolor

The total revenue for the brand Magicolor is 9,592,812.00.

Region	District	Revenue (USD)
EASTERN REGION	BOSTON DISTRICT	4,375,600.00
CENTRAL REGION	KANSAS CITY DISTRICT	2,671,080.00
EASTERN REGION	PHILADELPHIA DISTRICT	2,546,132.00
	Total	9 592 812 00



### **Supported Layout Types**



#### **All Applications**

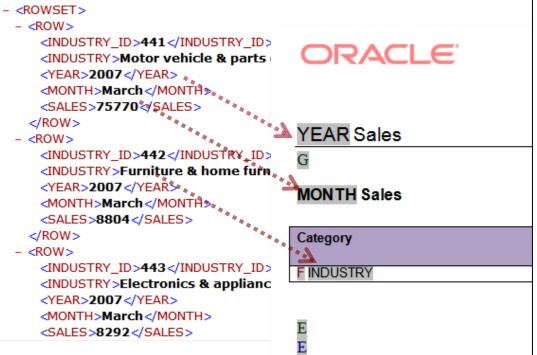
- Microsoft Word (RTF)
- Adobe Acrobat (PDF)
- XSL-FO
- eText

#### **Enterprise Applications**

- Layout Editor
- Excel
- Flash

**Design Layouts by Mapping Data to Location in** 

**Template** 





#### 2006 Sales

#### March Sales

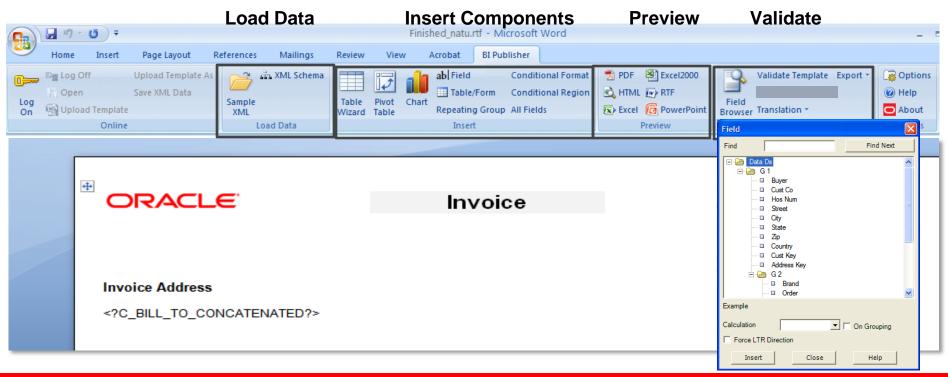
Category	Sales (In thousand USD)
Motor vehicle & parts dealers	\$73,458
Furniture & home furnishings stores	\$8,655
Electronics & appliance stores	\$7,762
Building material & garden eq. & supplies dealers	\$25,385
Food & beverage stores	\$40,854
Health & personal care stores	\$16,977
Gasoline stations	\$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 USD)
Motor vehicle & parts dealers	\$71,56
Furniture & home furnishings stores	\$8,41
Electronics & appliance stores	\$7,71
Building material & garden eq. & supplies dealers	\$23,14
Food & beverage stores	\$40,44
Health & personal care stores	\$16,56
Gasoline stations	\$25,01
Clothing & clothing accessories stores	\$15,61
Sporting goods, hobby, book & music stores	\$6,67
General merchandise stores	\$40,86
Miscellaneous store retailers	\$8,64
Nonstore retailers	\$18,50
Food services & drinking places	\$30,80

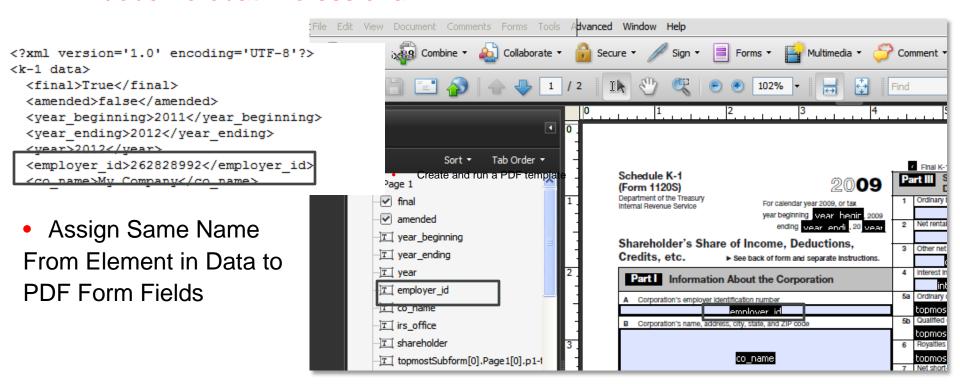
### **Layout Design Tools**

#### Template Builder for Microsoft Word Add-in



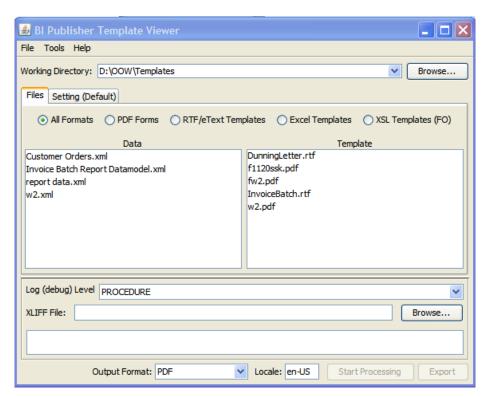
### **Layout Design Tools**

#### Adobe Acrobat Professional



### **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



Annual Salary

\$31,200

\$31,200

\$42,000

\$37,200

\$31,200

\$30,000

\$37,200

#### **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

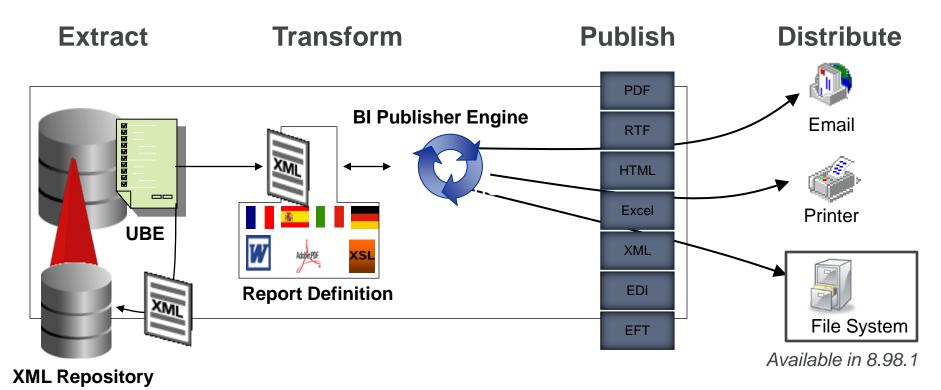


#### **Limited Use License**

Release	What's Included
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

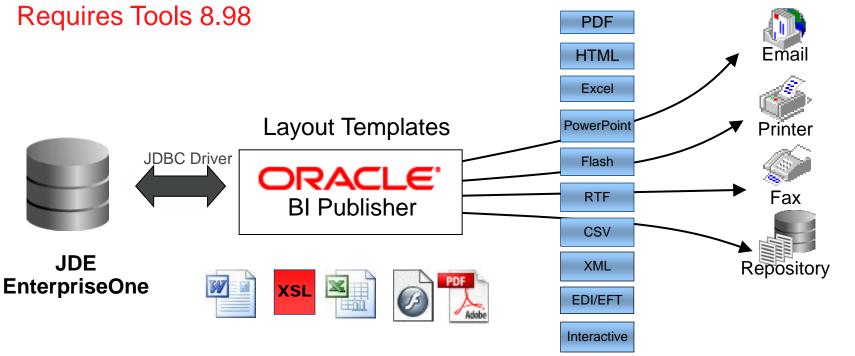
### **Embedded BI Publisher**





### Interactive Reporting with BI Publisher





**Layout Tools** 

**Output Formats** 

**Destinations** 

### When to Use Embedded or Interactive



8.98 Tools Single BIP Solution, Different Use Cases

#### **Embedded**

- An event in JDE E1 triggers the report
- Need to update data in the database
- Data manipulation
- No user action

#### Interactive

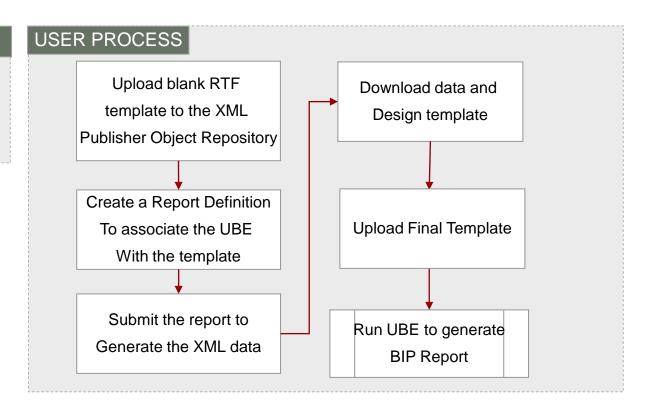
- An event outside of JDE E1 triggers the report
- Read-only data
- Minimal data manipulation
- On demand

### **Embedded Setup and Report Process**



#### **SETUP**

Install BI Publisher Desktop



### **Interactive Setup and Report Process**

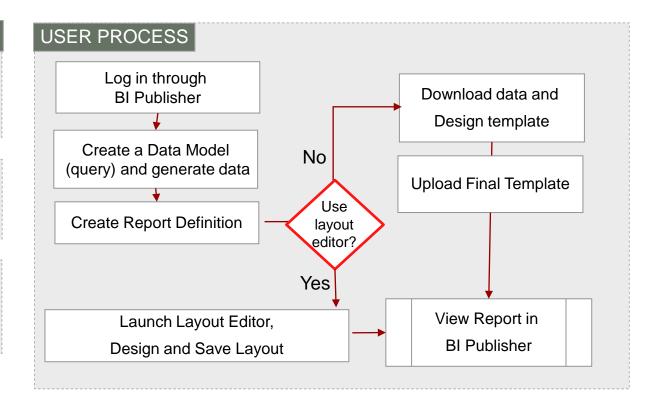


#### **SETUP**

Install BI Publisher Enterprise

Install and configure the data Access (JDBC) driver

Install BI Publisher Desktop



#### **#1 User Group Request**

### **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

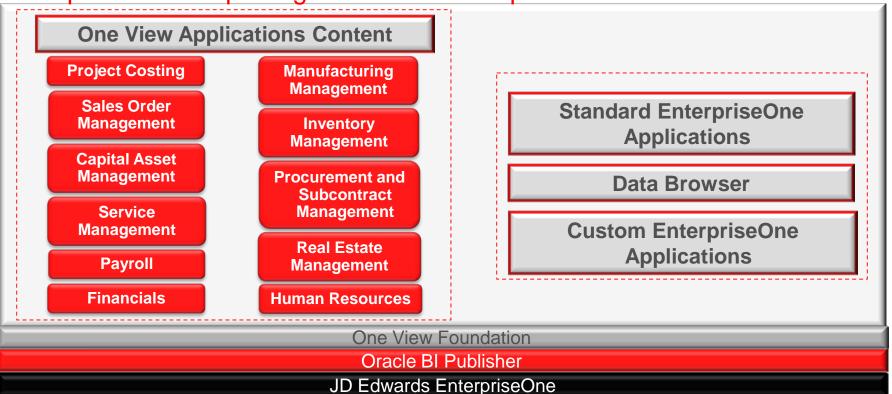
#### Results

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

### **One View Reporting**



Operational Reporting Across the Enterprise



#### For More Information



#### BI Publisher for JD Edwards EnterpriseOne



**Start Here:** 

www.support.oracle.com

Search for Article ID: 789074.1

One View Reporting:

http://www.oracle.com/us/products/applications/jd-edwards-enterpriseone/one-view-reporting/overview/index.html



### **JD Edwards World**

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

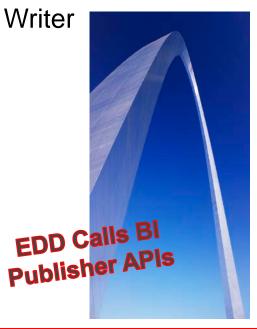


### How Is It Integrated (A9.2)



#### 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

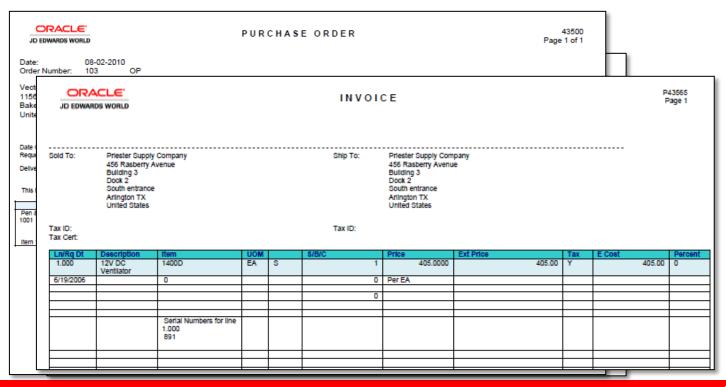
-- Purchase Orders

- 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?

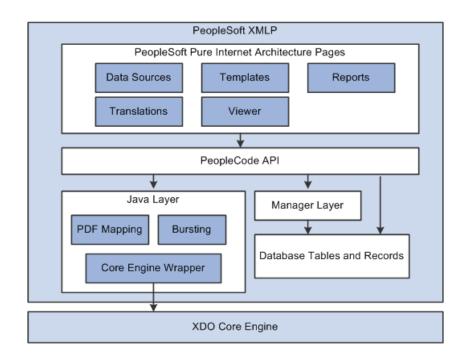


## How Is It Integrated?



# PeopleSoft Pure Internet Architecture pages for:

- Defining data sources
- Creating report definitions
- Managing templates
- Managing translations
- Viewing report output



### How Do I Use It?





Install BI Publisher Desktop

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

**USER PROCESS** Create the Report Definition: Create and register the Associate data source with template Data source\* Define Output options Grant security Define Bursting Generate sample XML **Upload Template** Download data and Design Run Report RTF template

See Appendix for details

### For More Information



#### PeopleSoft Enterprise



#### **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

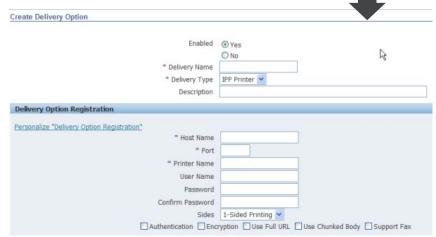
Set up IPP in the System Administration Interface for Print and Fax



 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\*



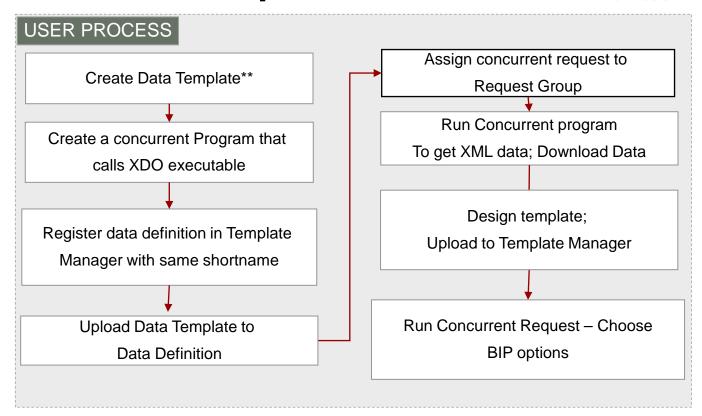


**Desktop Tools** 

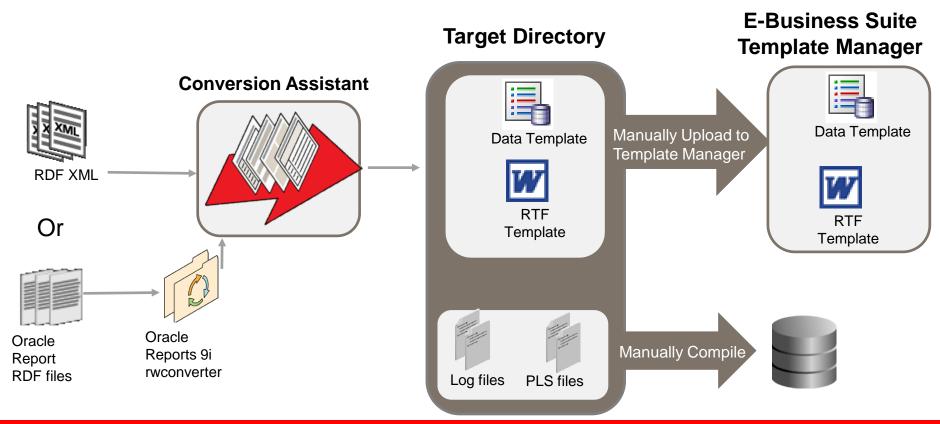
Download

\*Details in appendix

\*\* Oracle Reports can also be used as data source



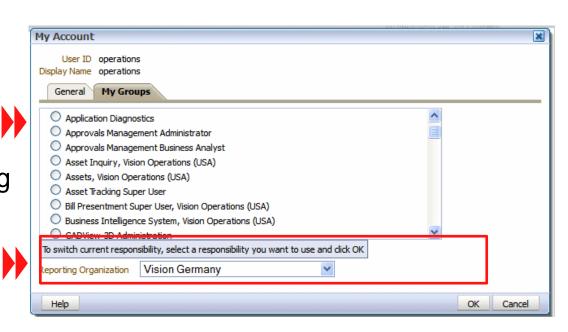
## **Conversion Assistant**



## E-Business Suite 11g Integration

#### Choose Responsibility When Logging in to BIP

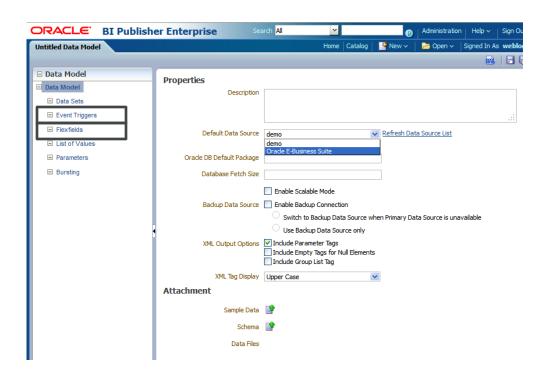
- Log in using EBS credentials
- Select/Change Responsibility
- Select/Change Reporting Organization (multi-org support added in 11.1.1.6)
- EBS Security Enforced



## E-Business Suite 11g Integration

#### E-Business Suite Automatically Configured as Data Source

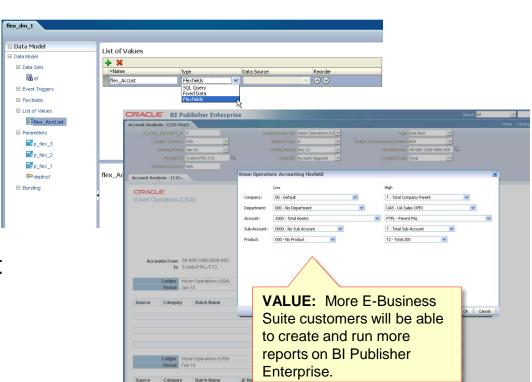
- Write queries against E-Business Suite Applications tables
- Combine with data from other sources
- Support for Flexfields and PL/SQL Event Triggers built into data model design



## **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**



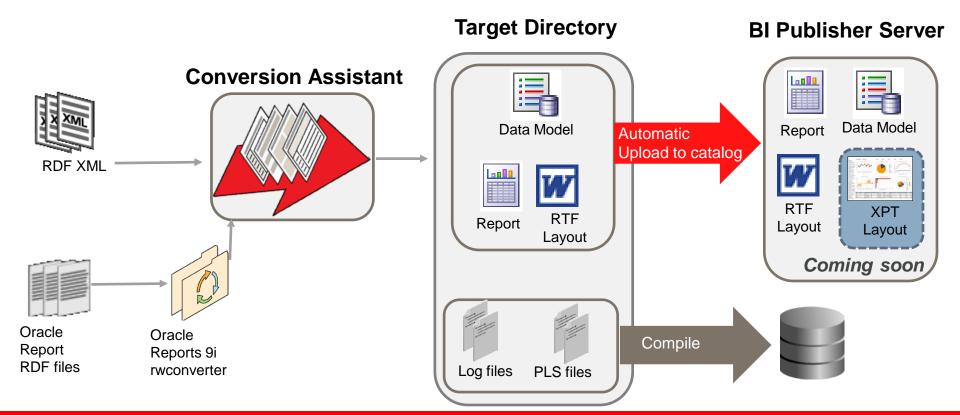
## **Convert EBS Catalog to BI Publisher**

#### Planned Feature

- Converts XML Publisher Data Templates to Publisher 11g Data ☐ EBS to BIP 11g Repository migration Utility - Step 4 of 9 Models
- Creates an 11g report to hold layouts
- Uploads directly to catalog



## **Enterprise Conversion Assistant**





## **Siebel CRM**

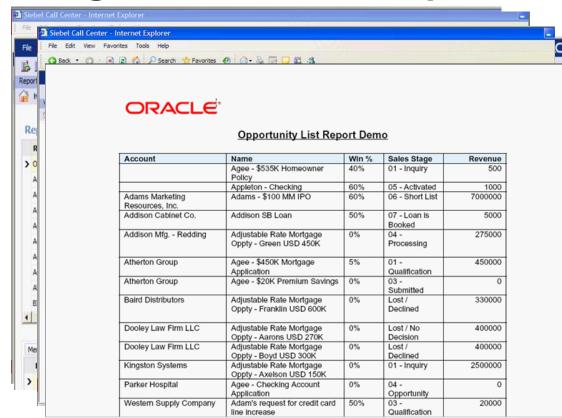
- How Do I Use It?
- What Are the Features?
- What's Coming?



## **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)

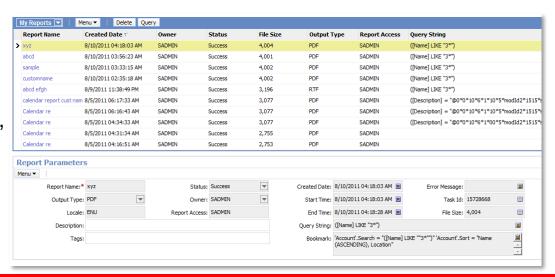
8.1.1.5 solution also available in 8.0.0.12 and 8.2.2.

#### **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**



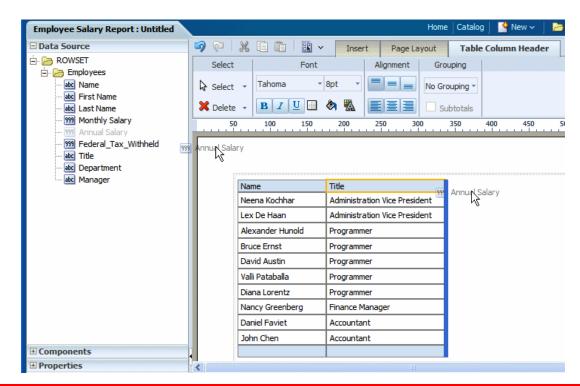
### By Application

Applications Unlimited Product	11g Integration Status	
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**

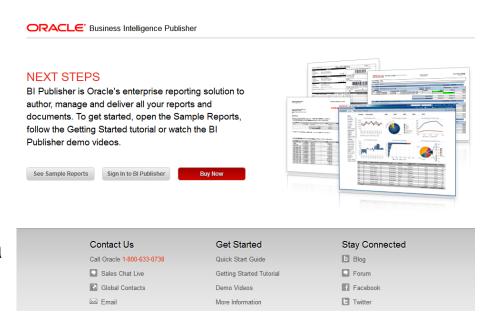


- Layout Tools
  - Online Layout Editor
  - True Excel Templates
- Data Model Editor
- More Data Sources
  - CSV Files (planned), Local Excel files; combine with corporate data
  - Web services, BI Analyses, LDAP, OLAP, HTTP
- Output
  - Interactive
     -- PDF/A
  - Mobile-- PDF/X

#### 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

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

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

# **Stay Connected with BI Publisher**

#### Oracle Technology Network

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

Oracle BI Publisher Blog

from pixel-perfect to interactive reporting...

Linked in

You Tube "

Forum: BI Publisher

Covers Oracle BI Publisher (formerly XML Publisher)



**twitter** 

# Q&A

# ORACLE®

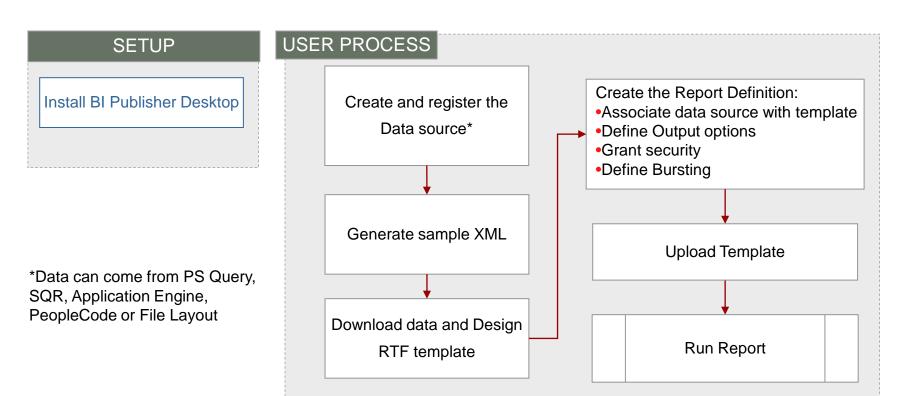
# **Appendix**

Application-specific steps

- PeopleSoft
- E-Business Suite

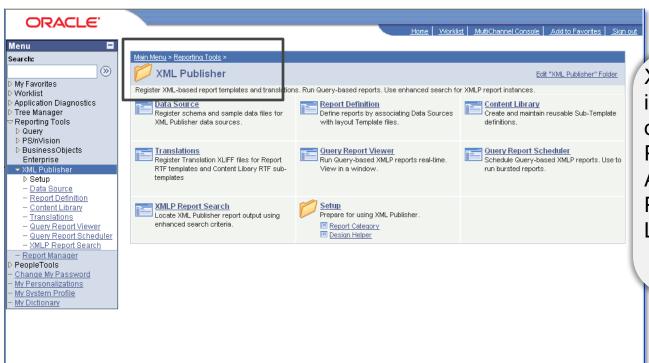
## **Process for PeopleSoft**





## Create Data Source and **Generate XML Data**

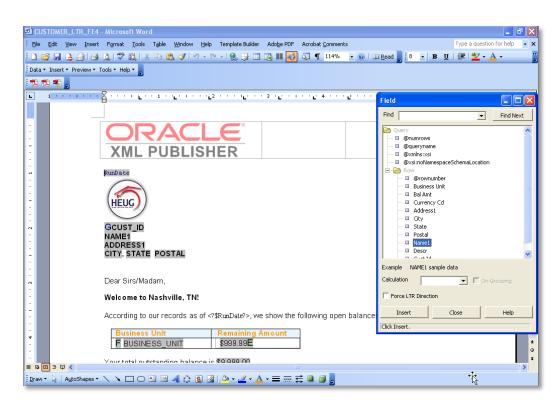




XML data can be input using a variety of means, including: PS Query, SQR, Application Engine, PeopleCode, or File Layout

# **Design Your Layout**

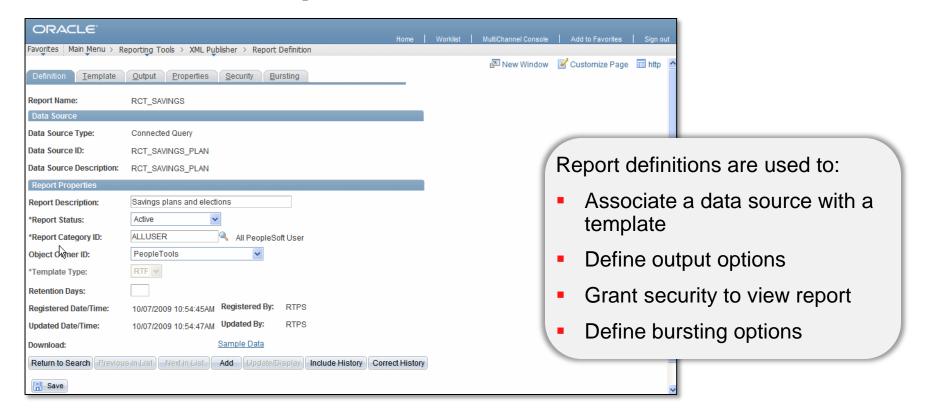




Load the sample XML data to the Template Builder to design the report layout.

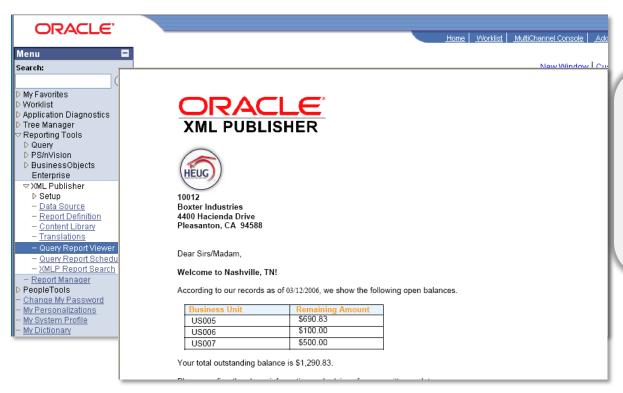
## **Create the Report Definition**





## Run Your BI Publisher Report





Run report via:

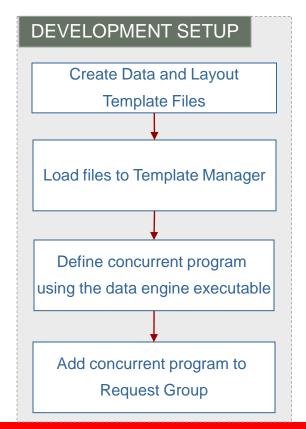
- Query Report View
- Query Report Scheduler
- Online PeopleCode
- Batch PeopleCode

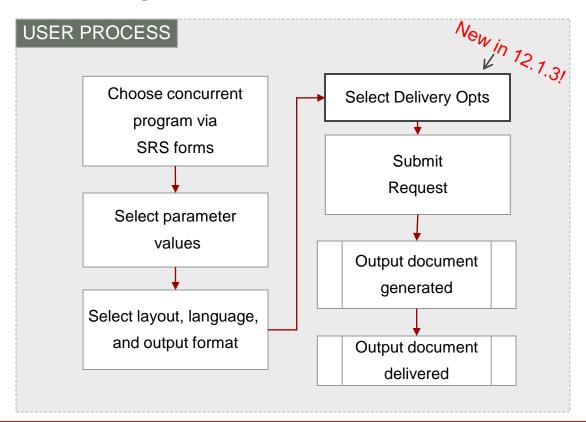
#### **E-Business Suite Details**



#### **E-Business Suite Setup and Process**







#### **Create Data Template**

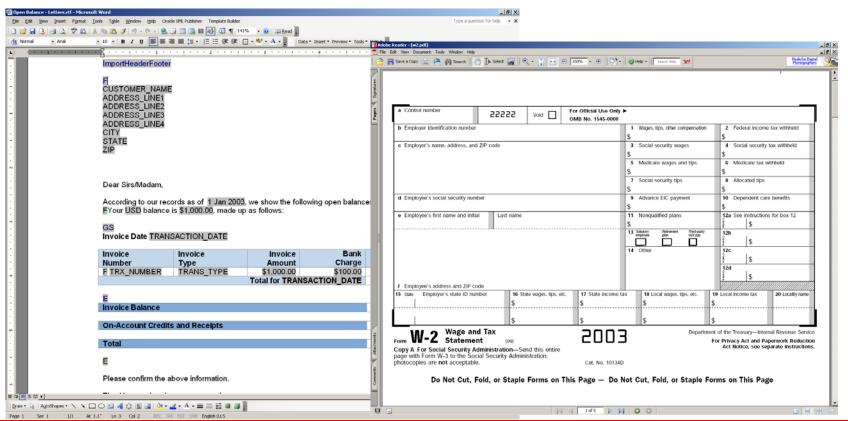


- The data template tells XMLP the query to execute and the structure to return. It consists of:
- A <parameters> section to define parameters, their data types and default values
- A <dataQuery> section to define the SQL query to execute
- A <dataStructure> section to define the output structure for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



## **Create Layout Template**

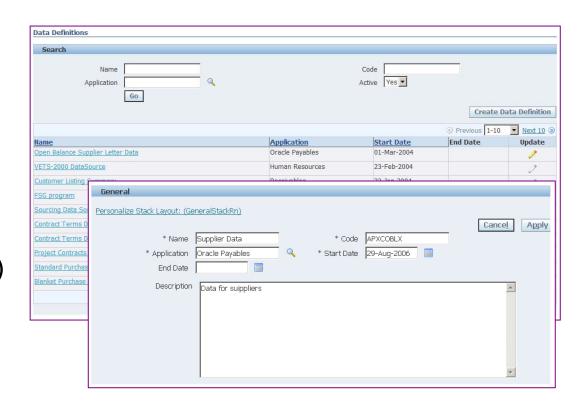




### **Register Data Definition**



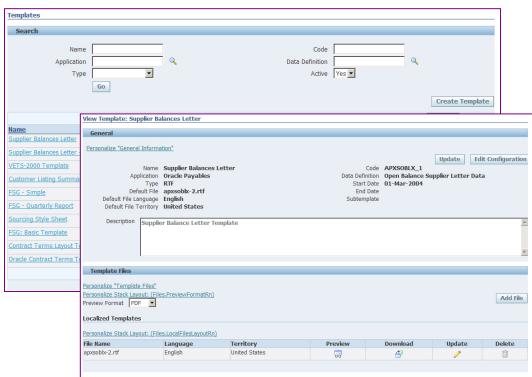
- Use XML Publisher
   Administrator
   responsibility
- Create data definition
- Load sample data (and schema for PDF layouts)
- 4. Load data template file



### **Register Layout Template**



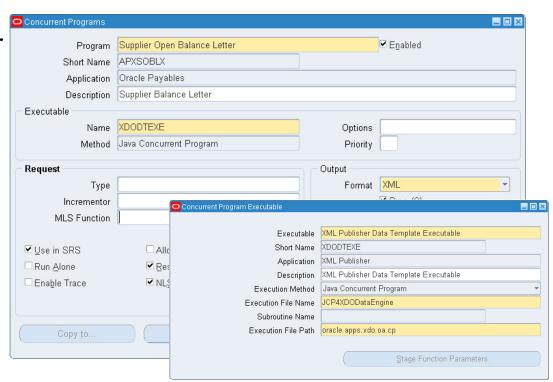
- Use XML Publisher Administrator responsibility
- Create template entry, assign it the Data **Definition Code**
- Load template file



#### **Define Concurrent Program** and Executable



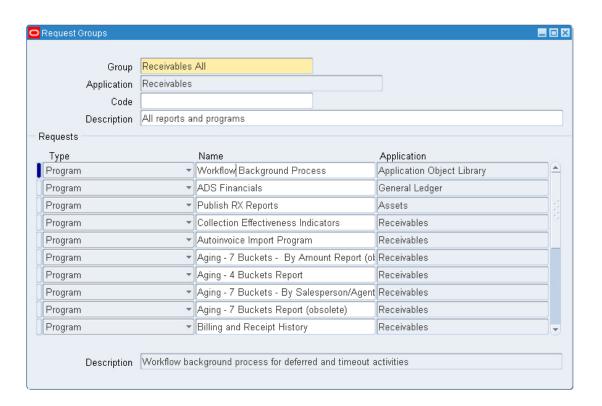
- Use System Administrator responsibility
- Create a concurrent program definition using the XML Publisher Data Template executable
- The **Short Name** must match the **Data Definition Code**



### Add the Program to a Request Group



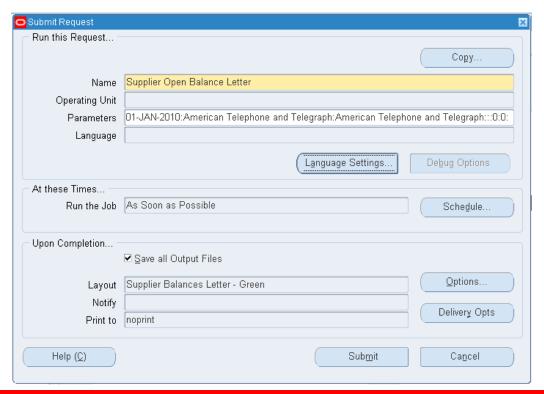
Security > Responsibility > Request



## Run the Report



User Selects the Report From a List and Clicks **Options** 



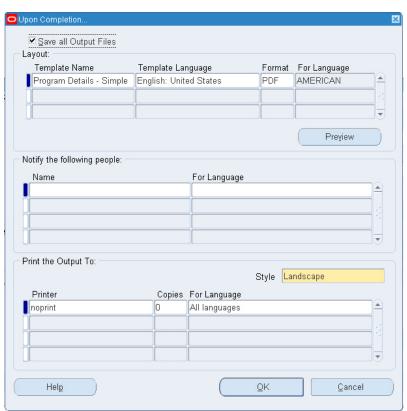
Select Template, Language,

E-BUSINESS SUITE

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**Format** 

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

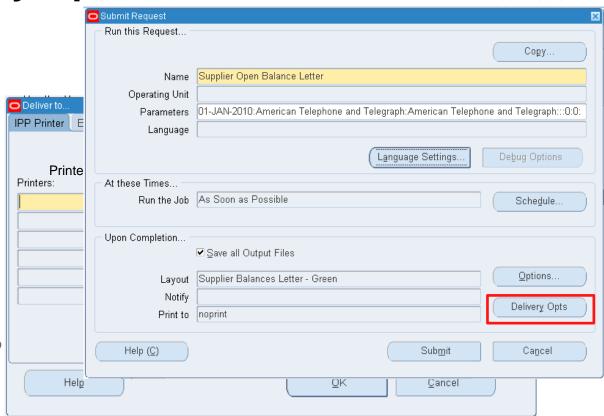


## **Select Delivery Options**



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

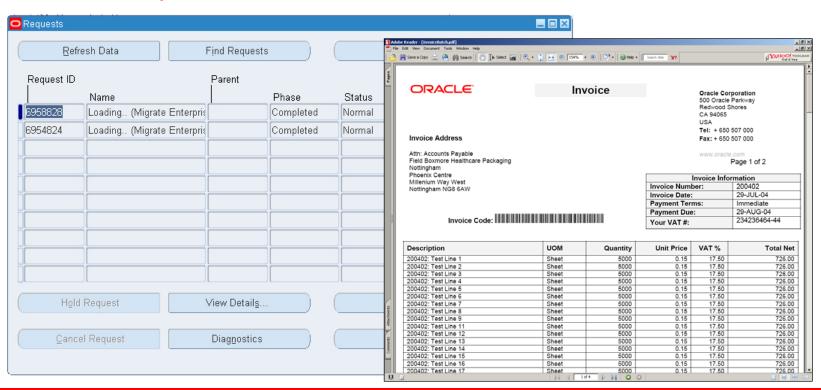




### **View Final Output**

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#### Monitor Requests Form



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