Experiences using BI Publisher in R12

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Oracle BI Publisher

- Oracle BI Publisher – Brief Introduction
- What’s New in R12
- Conversion strategies & Techniques
  - Oracle Reports Conversion
- Oracle Reports Migration
- Tips and Techniques
Earlier .. Separate Tools ..
In Classic Reporting..
In Classing Reporting .. Contd.

Data logic

10 Layouts

10 Translations

You have to maintain 100 report files!!!
Reporting Challenges

In Summary,

- Complex, Costly Reporting Environments
- Slow, Costly Report Development Process
- Increased cost of doing Business
- Report Maintenance Difficulties
Oracle BI Publisher

- Offers a more “user-friendly” UI to tailor documents
- Supports most frequently used business documents
- Can produce documents in multiple formats & in multiple languages
- Reduces dependence on IT
- Integrates easily with the existing IT Infrastructure
- Reduces Costs
Oracle BI Publisher supports most of the documents.

- Purchase Orders
- Labels/Bar Codes
- Collateral
- Government Forms
- eText
- Order Forms
- Invoices
- Operational Reports
- Correspondence
- Financial Statements
- Checks
Oracle BI Publisher supports .. Multiple Languages..

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<tr>
<th>Language</th>
<th>Support Format</th>
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<tbody>
<tr>
<td>Russian</td>
<td>Chinese GBK</td>
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<td>“楊利偉表現超乎預料”</td>
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<td>Hebrew</td>
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<td>法语</td>
</tr>
<tr>
<td>犹太文</td>
<td>西班牙文</td>
</tr>
</tbody>
</table>
Oracle BI Publisher supports ..

- One template for 185 languages and 244 territories
- Single global instance
- Full set of unicode fonts
- No need for expensive language-specific printers
BI Publisher Benefits

.. From Data sources to Destinations ..

Data Sources
- Oracle 10g, Oracle BI EE, Oracle BI Apps
- SQL Server
- E-Business Suite, PeopleSoft, Siebel, JDE
- OLAP
- Web Services

Layouts
- Publisher
- Excel
- Word
- Flex
- Acrobat
- Others

Layout Tools

Output Formats
- Interactive
  - PDF
  - HTML
  - Excel
  - Power Point
  - Flash
  - RTF
  - CSV
  - XML
  - EDI
  - EFT

Destinations
- Email
- Printer
- Fax
- Repository
- e-Commerce
What’s New in R12 for BI Publisher

- Default Output Type (Templates)
- Available Translations Region
- Export and Upload Translations
In 11i, Template definition, (No Default output type)

**General**
- **Name**: Sales Order RTF Template
- **Application**: Order Management
- **Type**: RTF
- **Default File**: ONTORDRTF_en.rtf
- **Default File Language**: English
- **Default File Territory**:

**Description**
Main RTF Layout Template sample used for defining a Sales Order printing format

**Template Files**
- **Personalize “Template Files”**
- **Personalize Stack Layout: (Files PreviewFormatRn)**
- **Preview Format**: PDF
In R12, XML Template

In R12i, (Default Output type can be Excel, PDF, HTML, FO, RTF can be selected)
In R12, XML Template

In R12i, (Export & Upload Translations)

- Personalize "Template Files"
- Personalize "Translatable Template"
- Personalize Table Layout
- Preview Format: PDF

Available Translations
- Select Translation(s) and...
- Enable / Disable
BI Publisher Components for Reports

- Templates
- Data Definition
- Concurrent Request (for Running a Report)
BI Publisher Components for Reports

■ Templates

■ For Report Layouts, RTF documents (MS Word) are user friendly.

■ Download Patch 9811428: ORACLE XML PUBLISHER DESKTOP PATCH 5.6.3

■ Supersedes the Patch: 5887917 (dtd. Dec 1, 2009)
BI Publisher Components for Reports

- RTF Template – Output formats
BI Publisher Components for Reports

Template Builder & RTF Template Enhancements

- Ribbon Toolbar
- Gauges
- Dual Y Charts
- Running Totals
- Form fields up to 40k
- Group Left Enhancements
- Style Templates
- Sample Data
- Business View support
- Non Admin User install
BI Publisher Components for Reports

For a Concurrent Program Execution

- Develop Report (RDF)
  - Data Model
  - Layout (RTF)
- Define Executable
- Define Concurrent Program
- Add to a Request Group
Responsibility: XML Publisher Administrator

1) Data Definition
2. Define Template

![Image of BI Publisher Components for Reports]

- **General**
  - Name: Purchase Order Detail Report (XML)
  - Application: Purchasing
  - Type: RTF
  - Default File Language: English
  - Default File Territory: United States

- **Template Files**
  - Personalize "Template Files"
  - Preview Format: PDF

- **Translatable Template**
  - Personalize "Translatable Template"

- **File Name**
  - POXPOSTD_XML.rtf
  - Language: English
  - Territory: United States
3. Run The Report with Layout - Template Name

4. On completion – Layout format with Template Name and Format (output type, i.e. PDF, Excel)
A. Analyze reports
   - Eliminate unused reports
   - Categorize reports by Data
   - Categorize reports by Complexity
   - Evaluate the report size
   - Reduce number of reports

B. Use Data Template to handle Data design
C. Use RTF Template to handle Layout design
D. Convert data handling functions into database functions
E. Convert layout formatting functions into XSL/java functions
Conversion Strategies and Techniques

- Oracle Report Migration Utility to BI using APIs
  - Data Model Conversion
  - Layout Conversion
- The migration APIs accept an Oracle Report in XML format (which are Reports 9i+ version)
- To get reports in XML format from RDF format (for RDFs in 6i version):
  - Oracle Report Designer
  - Report Converter utility
Conversion Strategies and Techniques

- 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
Conversion Strategies and Techniques

- Converting Packing Slip report

- Syntax

  %ORACLE_HOME%/bin/rwconverter batch=yes
  source=E:\Temp\wshrdpak.rdf
  dest=E:\Temp\wshrdpak.xml dtype=xmlfile overwrite=yes
Benefits from Migrating to BI Publisher

- Multiple Formats/Editable Documents
  Excel (for filtering, calculations)
- Graphs/Graphic Support
- UTF8 –Support
  Reports6i pdf output only supports ASCII character sets.
- Eliminates 3rd party solutions:
  (BI Publisher can do)
  - Check Printing
  - Barcoding
  - Multilingual
Benefits from Migrating to BI Publisher

- 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
- Real-time reporting
  - Kick off and display BI Publisher Reports from OA Framework or Oracle Forms
  - Rich Set of APIs
  - Document Delivery
  - Merging Documents
  - Bursting
While Conversion – Additional 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
Additional Tips & Techniques
Additional Tips & Techniques

MICR Font in Check Printing

For RTF template, copy the font file to Directory - c:\WINDOWS\Fonts

Oracle provides MICR font on download of BI Template Builder.
Appendix

- **Oracle BI Publisher**
  

- **Oracle Technology Network**
  

- **Oracle**
  
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Thank you

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shaping tomorrow with you