

Introduction to BI Publisher in R12: Getting Started

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Manager of Product Development
STR Software



About STR Software

- **STR Software**

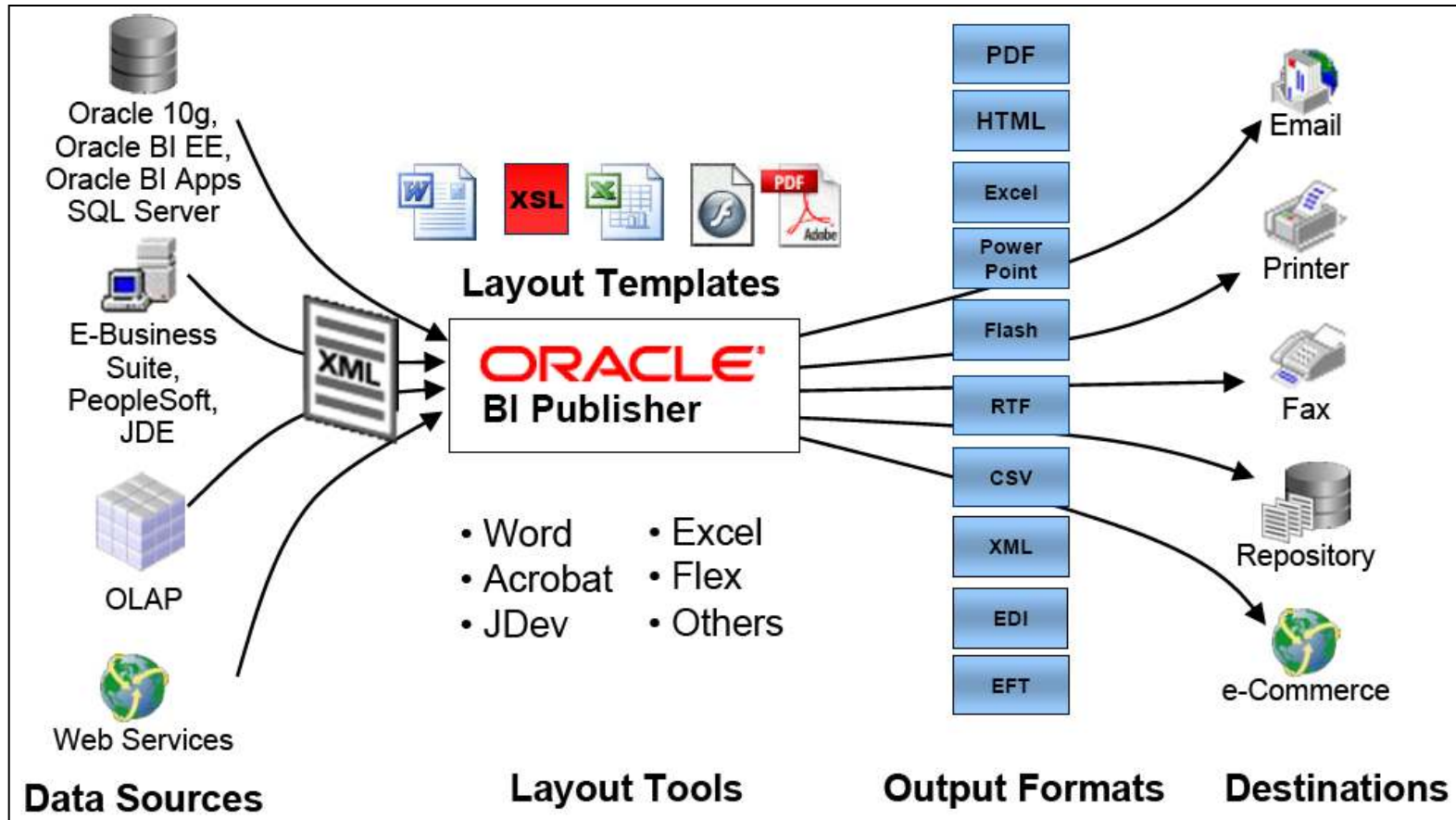
- Located in Richmond, VA
- Focused on document delivery solutions since 1988
- Over 1,230 licenses of AventX in 47 states and 19 countries
- Over 94% customer retention
- Oracle Gold Partner with staff of Oracle Certified Professionals
- OAUG 2-Star Elite partner for 2011
- www.strsoftware.com

- **Brent Lowe**

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- <http://www.thelowedownblog.com>

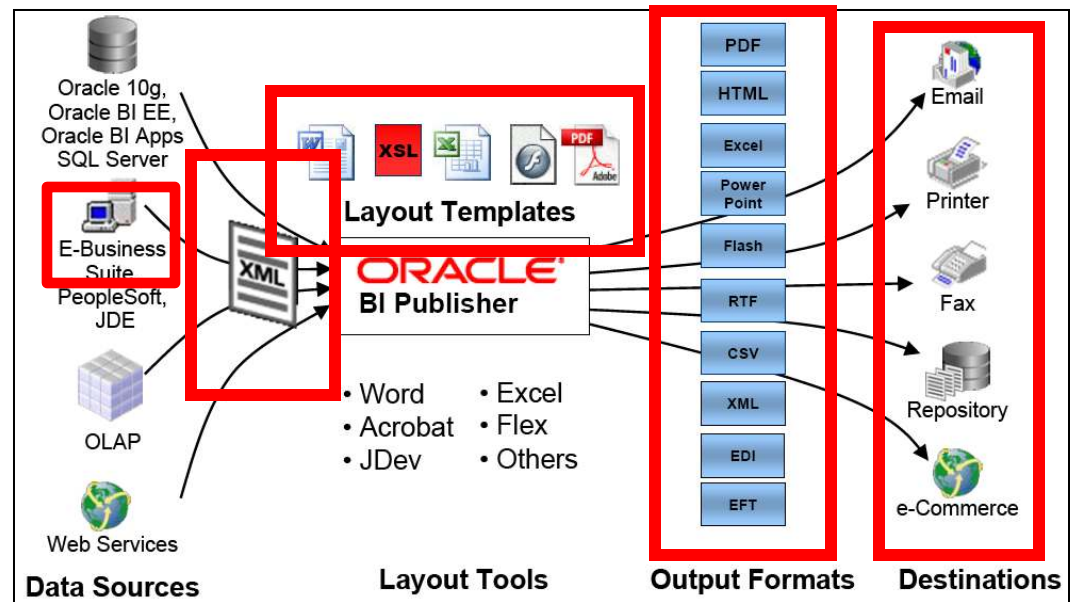
- Introduction
- General Concepts
 - BIP in EBS
 - Data Creation
 - Layout Template Creation
 - Output
 - Delivery
- Deviations from the Standard
- Where/How to Get Help
- Wrap-up and Q&A

Introduction – BI Publisher



AVENTIX General Concepts

- BIP in EBS
- Data Model
- Layout Templates
- Report Creation
- Bursting and Delivery



10.1.3.4.1

5.6.3

BI Publisher

XML Publisher

BI Publisher == XML Publisher

For EBS: 5.6.3

Running R12? -> Congrats, you already have 5.6.3!

Running 11i? -> MOS 422508.1 – About Oracle XMLP Release 5.6.3

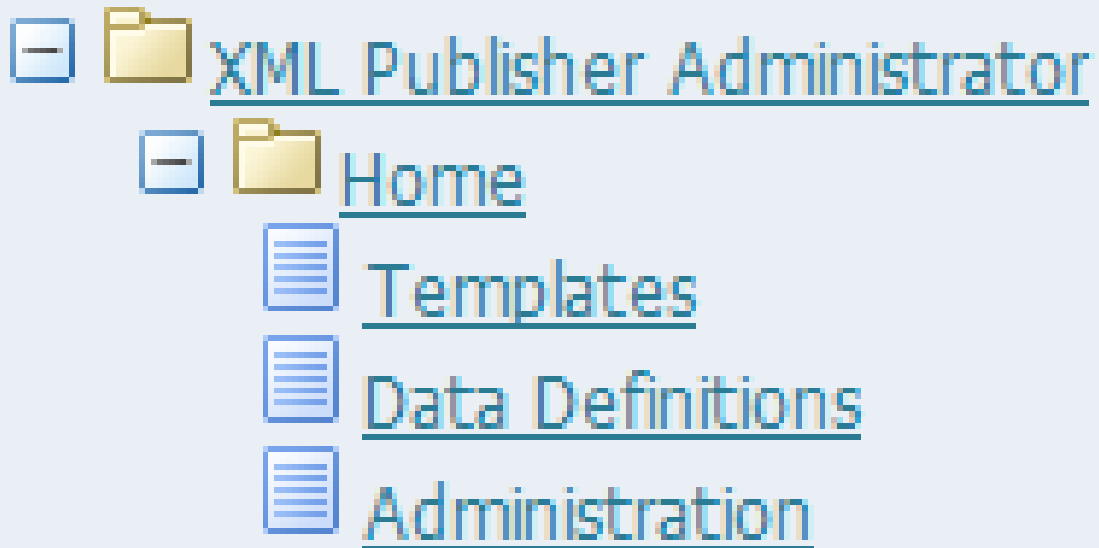


Get to the Latest Version of BIP for EBS

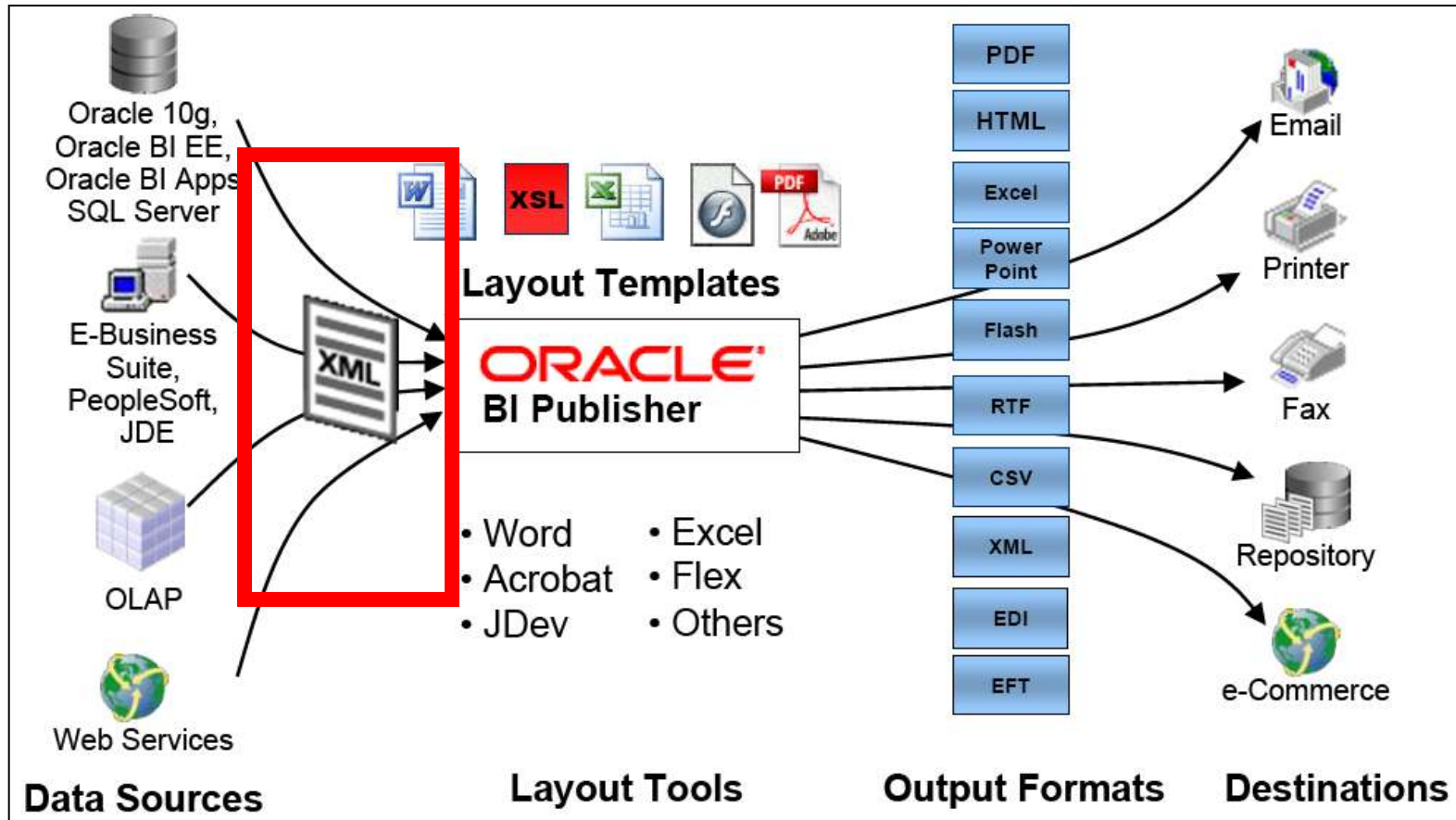
Patch 5.6.3!

MOS 1138602.1 – Overview of Available Patches for Oracle XML Publisher (embedded in Oracle E-Business Suite)

Some Individual Patches are available
Patch Sets are rolled into ATG Family Packs.



Data Model – Creating the XML



Having Oracle EBS generate **XML data** is the key to reporting.

- Oracle Reports
- Data Templates





Data Model: Oracle Reports

- Utilize your EXISTING Oracle Reports!

- But aren't Oracle Reports going away?



Data Model: Oracle Reports

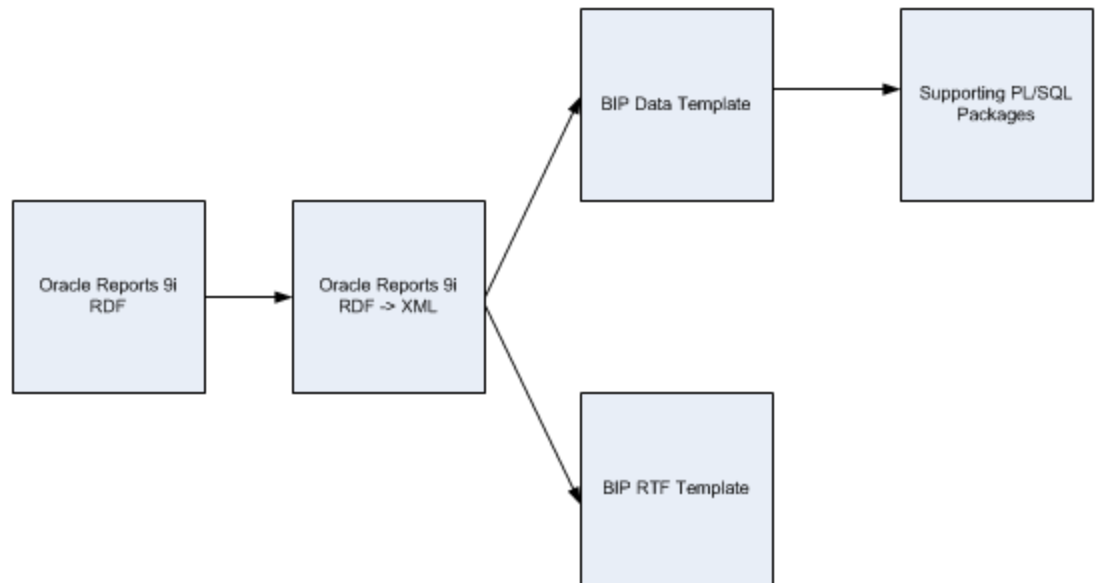
- Demo – How to setup Oracle Reports to output XML

Data Model: Data Template

- Native BI Publisher Concept – Exists as text based file that looks like XML
- Serves two functions.
 - Retrieve Data using SQL queries.
 - Define how the data is to be formatted as XML.
- Why Use Data Template over Oracle Report?
 - Speed
 - Flexibility
 - Removes duplicity of layout
 - 2000+ Data Templates included in R12.1

- Example

- Conversion API



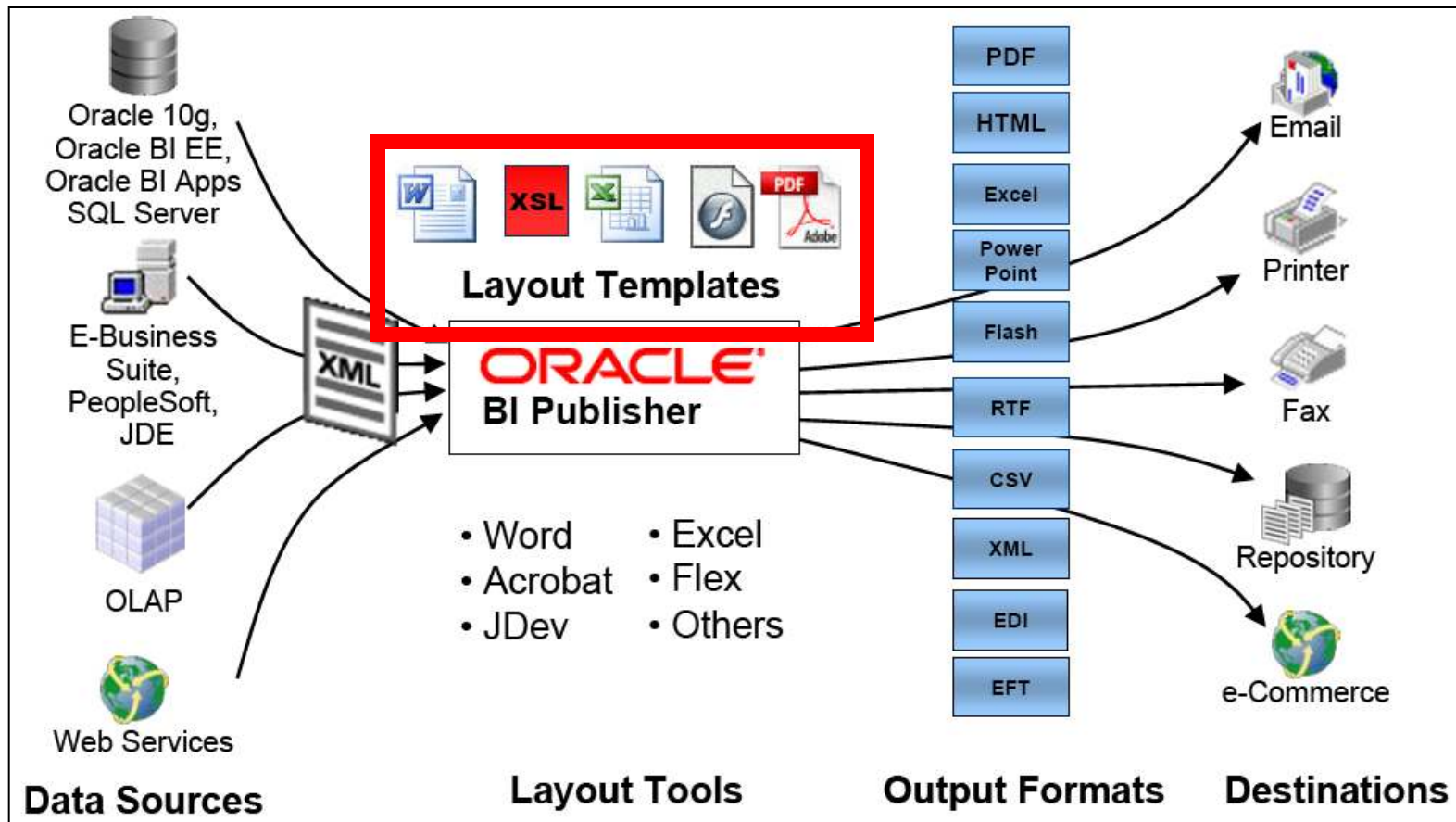


Data Model: Data Template → Concurrent Program

- Concurrent Manager must have Program Definition to generate output!
- Set 'Executable' to XDODTEXE
- Demo

- Regardless of Oracle Report or Data Template, must register a Data Definition.
- XML Publisher Administrator Responsibility
- Demonstration

AVENTIX Layout Templates



AVENTIX Layout Templates

- Define the look and feel of the finished output.
- Layout Templates can be created in a number of formats including eText, **PDF, RTF**, XSL-FO, XSL-HTML, XSL-XML and XSL-TEXT.

- BI Publisher Desktop

Latest version is 11.1.1.3.0

Use the version built with the same libraries as 5.6.3 -> 10.1.3.2

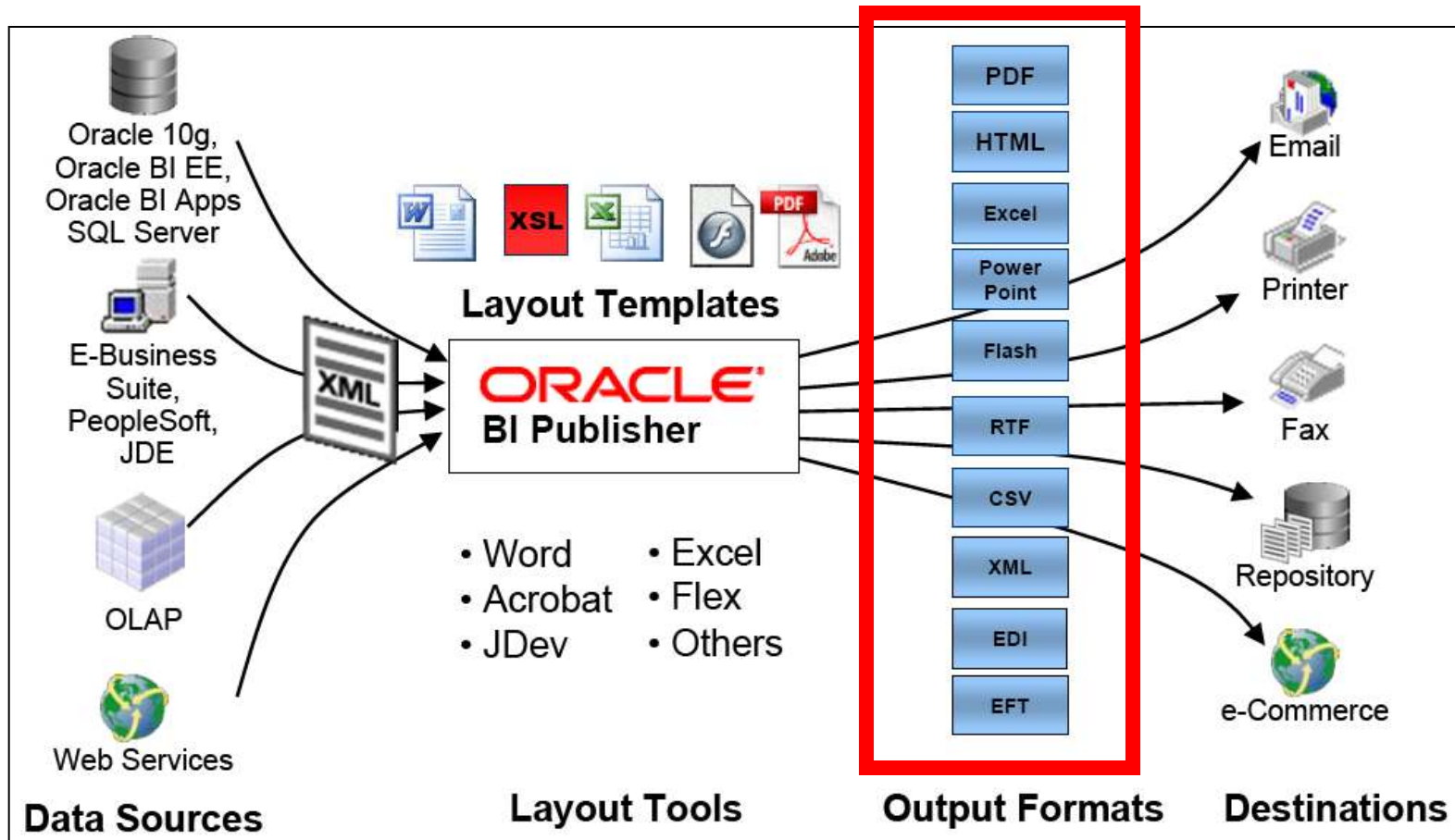
Patch 5887917



- Oracle's "Anatomy of a Template" Presentation (MOS 740964.1)
- 2700+ Templates included in R12.1

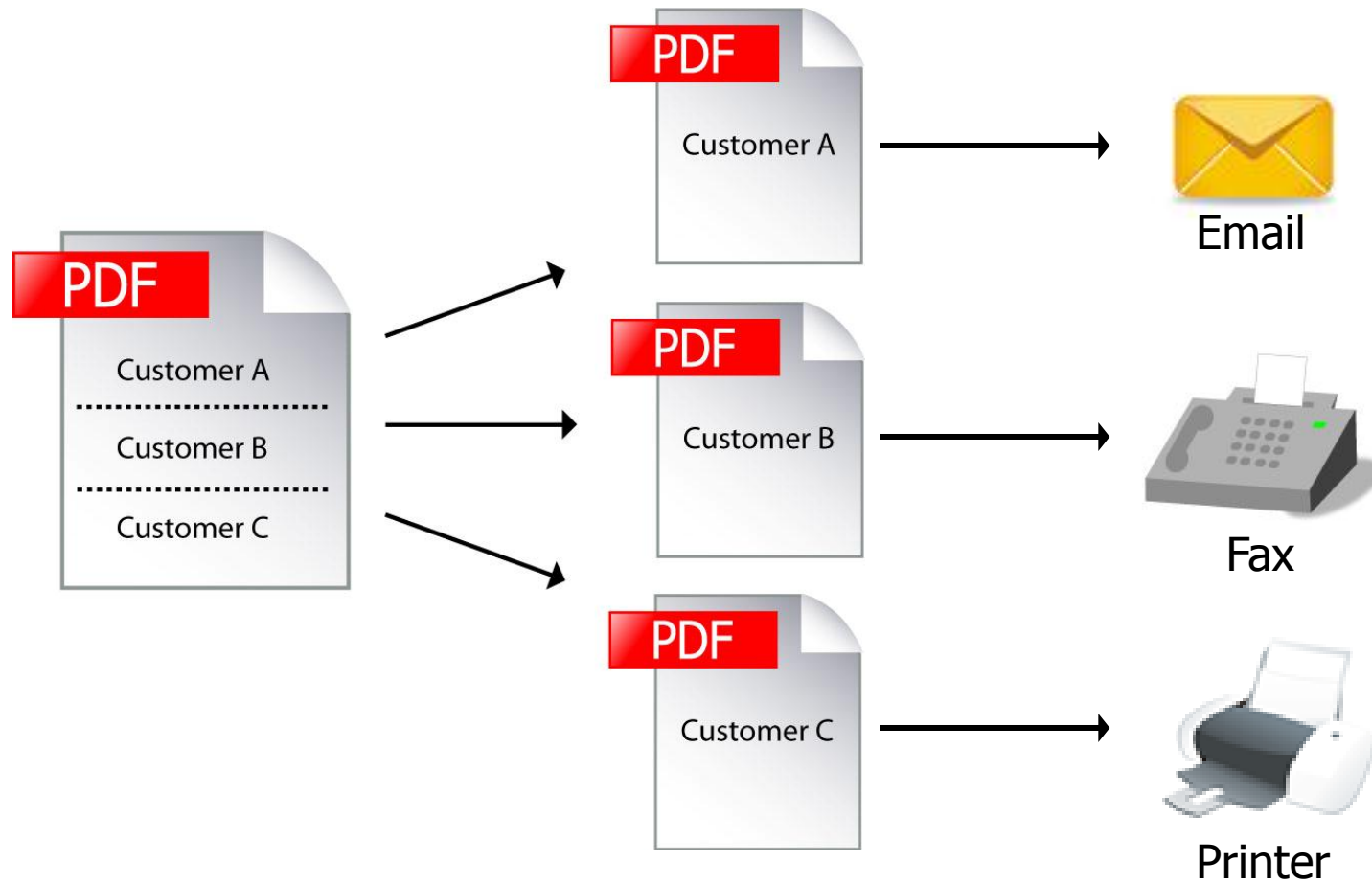
- XML Publisher Administrator Responsibility -> Templates.
- Upload Template, Associate with Data Definition, Assign Locale, Preview Finished Report.
- Demonstration

AVENTIX Report Creation



- EBS Supported Output Formats
 - Excel
 - FO
 - HTML
 - PDF
 - RTF
- Simple as running a Concurrent Request
- Demonstration

Report Bursting and Delivery



- A bursting control file is an XML based file that defines the answers to 4 main questions.
 1. How do I burst the document?
 2. How do I deliver the burst file?
 3. Where do I deliver the burst file?
 4. What should the delivered file look like?



Bursting Control File

```
<?xml version="1.0" encoding="UTF-8" ?>
- <xapi:requestset xmlns:xapi="http://xmlns.oracle.com/oxp/xapi">
- <xapi:request select="/RAXINV/LIST_G_ORDER_BY/G_ORDER_BY/LIST_G_INVOICE/G_INVOICE">
- <xapi:delivery>
- <xapi:email server="mail.strsoftware.com" port="25" from="qa@strsoftware.com" reply-to="qa@strsoftware.com">
  <xapi:message id="email1" to="brent.lowe@strsoftware.com" cc="" content-type="text/html" attachment="true" subject="Invoice #${TRX_NUMBER}">Dear
  Sir/Madam, Please find the attached invoice #${TRX_NUMBER} for ${BILL_CUST_NAME} dated ${TRX_DATE}. <br><br> Regards,<br> STR Software
  Receivables</xapi:message>
</xapi:email>
- <xapi:fax server="ipp://grimlock:631/printers/axtkocupsprinter">
  <xapi:number id="fax1">${BILL_ADDRESS4}</xapi:number>
</xapi:fax>
</xapi:delivery>
- <xapi:document key="${BILL_CUST_NAME}" output="Invoice_#${TRX_NUMBER}.pdf" output-type="pdf" delivery="email1">
  <xapi:template type="rtf" location="xdo://AR.COPY_RAXINV_SELB.en.US/?getSource=true" filter="./G_INVOICE[BILL_ADDRESS3='EMAIL']" />
</xapi:document>
- <xapi:document key="${BILL_CUST_NAME}" output="Fax_Invoice_#${TRX_NUMBER}.pdf" output-type="pdf" delivery="fax1">
  <xapi:template type="rtf" location="xdo://AR.COPY_RAXINV_SELB.en.US/?getSource=true" filter="./G_INVOICE[BILL_ADDRESS3='FAX']" />
</xapi:document>
</xapi:request>
</xapi:requestset>
```

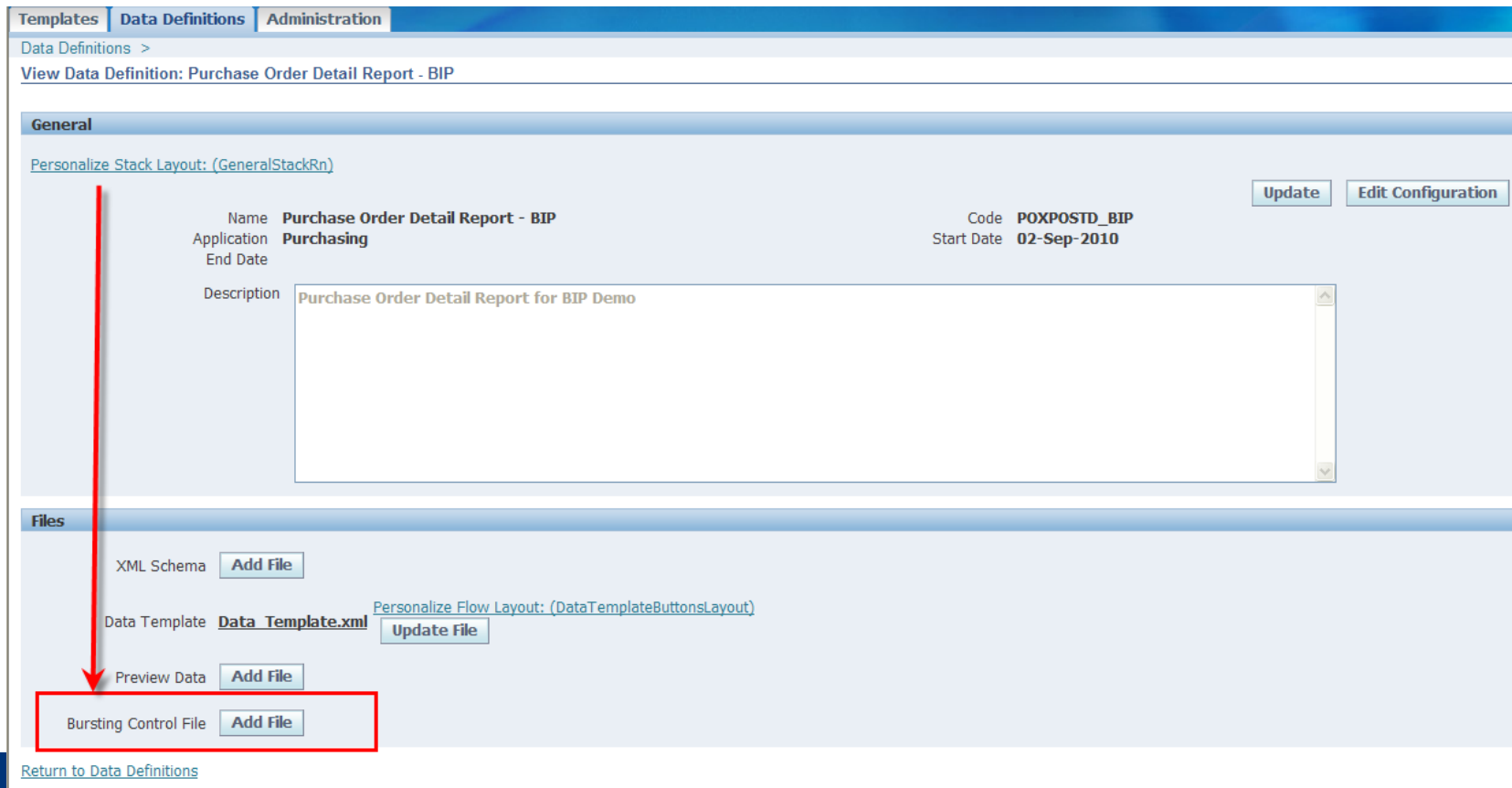
How to burst the document?

How to deliver the burst file?

Where to deliver the burst file?

What should the delivered file look like?

- Upload Bursting Control File to Data Definition



The screenshot displays the 'Administration' tab for 'Data Definitions'. The current view is for the 'Purchase Order Detail Report - BIP'. The 'General' section includes fields for Name, Application, End Date, Code, Start Date, and Description. The 'Files' section contains several 'Add File' buttons: XML Schema, Data Template (with 'Data Template.xml' selected), Preview Data, and Bursting Control File. A red arrow points from the 'Personalize Stack Layout' link to the 'Bursting Control File' button, which is also enclosed in a red rectangular box.

General

[Personalize Stack Layout: \(GeneralStackRn\)](#)

Name **Purchase Order Detail Report - BIP** Code **POXPOSTD_BIP**

Application **Purchasing** Start Date **02-Sep-2010**

End Date

Description **Purchase Order Detail Report for BIP Demo**

Files

XML Schema

Data Template **Data Template.xml** [Personalize Flow Layout: \(DataTemplateButtonsLayout\)](#)

Preview Data

Bursting Control File

[Return to Data Definitions](#)



Invoke Bursting

- 2 Step Process

Step 1: Run Concurrent Request to Generate Data.

Step 2: Run 'XML Publisher Report Bursting Program'

Demonstration

- XML Publisher Report Bursting Program creates it's own Report -> Bursting Status Report.
 - How document was burst
 - How documents were delivered
 - Status of delivery



Bursting Status Report

Bursting Status Report

Date: 2010-08-16 03:08:14

Page 1 Of 1

Request ID	4446348
Parent Request ID	4446347
Report Name	Invoice Print Selected Invoices - Bursting Demo
Output File	/disk1/oraapps/inst/apps/VIS1_silverbolt/logs/appl/conc/out/o4446348.zip

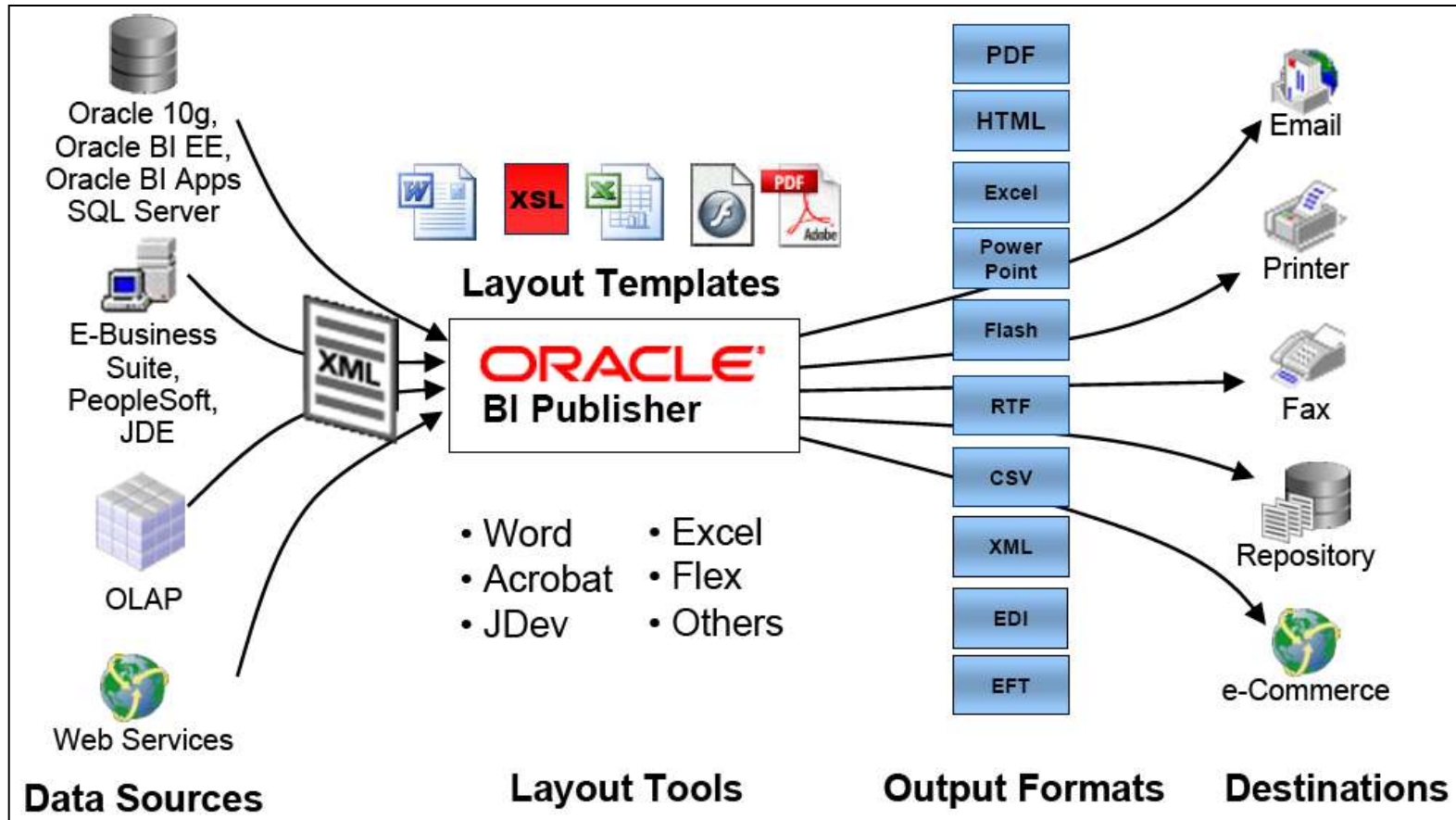
Key	Output Type	Delivery	Output	Status
Business World	pdf	Fax	/tmp/081610_035610028/Invoice_fax#10007144.pdf	Success
Hilman and Associates	pdf	email	/tmp/081610_035610028/Invoice_#10007145.pdf	Success



Delivery Engine

- **Email**
 - Allows for dynamic Recipient, CC, BCC, Subject, Message Body
 - Single Attachment – The report that was generated.
- **Print**
 - Utilizes IPP to print to CUPS based printers.
 - Depending on printer, specify tray, duplex, copies, etc...
- **Fax**
 - Utilizes IPP to print to CUPS based printers that communicate with Fax Modems.
 - Allows for dynamic fax number.
 - Status determined based on print job, not final outcome of fax.
- **File**
 - Output data to named file on file system.
- **FTP**
 - Send data to remote machine.

Standard Offering w/in Oracle EBS



Deviations from the Standard

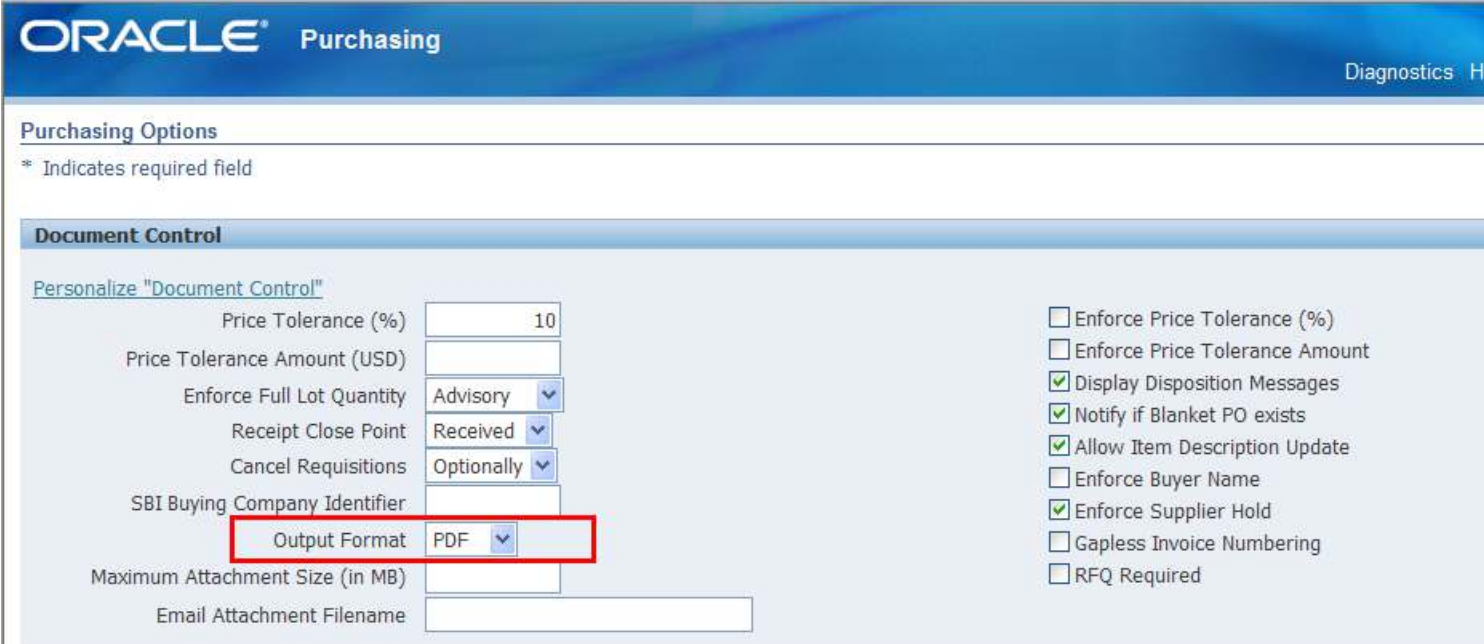
- EBS Application developers have used BIP APIs outside of ATG's standard
 - **Advanced Procurement**
 - Advanced Collections
 - Payables

Advanced Procurement

- PO Approval Process – Release Purchase Orders based on workflow process.
- Variations
 - Setup
 - XML Generation & Layout Templates
 - Report Generation & Delivery
 - Other Uses



- Setup
 - Purchasing Super User Responsibility -> Setup -> Organizations -> Purchasing Options



ORACLE Purchasing Diagnostics Help

Purchasing Options

* Indicates required field

Document Control

[Personalize "Document Control"](#)

Price Tolerance (%)	<input type="text" value="10"/>	<input type="checkbox"/> Enforce Price Tolerance (%)
Price Tolerance Amount (USD)	<input type="text"/>	<input type="checkbox"/> Enforce Price Tolerance Amount
Enforce Full Lot Quantity	Advisory <input type="button" value="v"/>	<input checked="" type="checkbox"/> Display Disposition Messages
Receipt Close Point	Received <input type="button" value="v"/>	<input checked="" type="checkbox"/> Notify if Blanket PO exists
Cancel Requisitions	Optionally <input type="button" value="v"/>	<input checked="" type="checkbox"/> Allow Item Description Update
SBI Buying Company Identifier	<input type="text"/>	<input type="checkbox"/> Enforce Buyer Name
Output Format	PDF <input type="button" value="v"/>	<input checked="" type="checkbox"/> Enforce Supplier Hold
Maximum Attachment Size (in MB)	<input type="text"/>	<input type="checkbox"/> Gapless Invoice Numbering
Email Attachment Filename	<input type="text"/>	<input type="checkbox"/> RFQ Required

- Setup
 - Associate Templates with Document Types
 - Purchasing Super User -> Setup -> Purchasing -> Document Types



Advanced Procurement

Document Types

[Personalize "Document Types Table"](#)

Type	Name	Document Type Layout	Contract Terms Layout	Update	Delete
Auction Buyer Auction	Sourcing Buyer Auction	Sourcing Style Sheet	Oracle Contract Terms Template		
Change Order Request Requisition	Change Order Request: Requisition				
Purchase Agreement Blanket	Blanket Purchase Agreement	Blanket Agreement Stylesheet with Logo	Oracle Contract Terms Template		
Purchase Agreement Contract	Contract Purchase Agreement	Contract Agreement Stylesheet with Logo	Oracle Contract Terms Template		
Purchase Order Planned	Planned Purchase Order				
Purchase Order Standard	Standard Purchase Order	Standard Purchase Order Fax	Oracle Contract Terms Template		
Quotation Bid	Bid Quotation				
Quotation Catalog	Catalog Quotation				
Quotation Standard	Standard Quotation				
Release Blanket	Blanket Release	Blanket Release Stylesheet with Logo			
Release Scheduled	Scheduled Release				
Requisition Internal	Internal Requisition				
Requisition Purchase	Purchase Requisition				
Request for Quotation Bid	Bid RFQ				
Request for Quotation Catalog	Catalog RFQ				
Request for Quotation Standard	Standard RFQ				
Sourcing RFI Sourcing RFI	Sourcing RFI	Sourcing Style Sheet	Oracle Contract Terms Template		
Sourcing RFQ Sourcing RFQ	Sourcing RFQ	Sourcing Style Sheet	Oracle Contract Terms Template		

- XML Generation
 - XML is generated based on the seeded views:
 - PO_HEADERS_XML
 - PO_LINES_XML
 - PO_DISTRIBUTION_XML

- Report Generation and Delivery
 - Once PO gets final approval (via workflow rules) the PO output gets created programmatically and “delivered” based on rules associated with PO Approval/Tools->Communicate.

Email – Workflow Mailer

Print – Concurrent Output (PO Output for Delivery)

Fax – Concurrent Output (PO Output for Delivery)

- Where to find help when you need it!



Help! - Documentation

- Documentation!

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

Oracle Technology Network > Middleware > BI Publisher > Documentation

Overview Downloads Documentation Community Learn More

Oracle Business Intelligence Publisher 11g Release 1 (11.1.1.3)

- 11.1.1.3.0 [Documentation Page](#)

Oracle BI Publisher 10g

- 10.1.3.4 [Documentation Page](#)
- 10.1.3.3 [Documentation Page](#)
- 10.1.3.2 [Documentation Page](#)
- 5.6.2 [Users Guide](#) [Install Guide](#) [JavaDocs](#)

Oracle E Business Suite R12

- 12.0 [Resources](#) [Document](#) [Known Issues](#) [Administration and Developer's Guide](#) [Report Designer's Guide](#)

Oracle E Business Suite 11i

- 5.6.3 [Resources](#) [Document](#) [Known Issues](#) [Administration and Developer's Guide](#) [Report Designer's Guide](#)
- 5.6.2 [About Document](#) [Users Guide](#) [Applications API](#) [Core Components API](#)
- 5.6.1 [About Document](#) [Users Guide](#) [Applications API](#) [Core Components API](#)
- 5.6 [About Document](#) [Users Guide](#) [Applications API](#) [Core Components API](#)
- 5.5 [About Document](#) [Users Guide](#) [Applications API](#) [Core Components API](#)

Navigation Menu:

- Fusion Middleware Home
- AIA Foundation Pack
- Business Intelligence
- Coherence
- Developer Tools
- Event-Driven Architecture Suite
- GlassFish Server
- Identity Management
- JRockit
- SOA Suite
- TopLink
- Tuxedo
- WebCenter Suite
- WebLogic Server
- Complex Event Processing
- Business Intelligence Foundation
- Data Integration
- Application Server



Help! - Blogs

- Tim Dexter/BIP Official Blog: <http://blogs.oracle.com/xmlpublisher>
- A BI Publisher developer's diary: <http://blogs.oracle.com/BIDeveloper/>
- Oracle BI Publisher Consulting: <http://bipconsulting.blogspot.com/>
- BI Publisher Blog - Ike Wiggins: <http://bipublisher.blogspot.com/>
- In Depth Apps - eBusiness Suite - Gareth Roberts: <http://garethroberts.blogspot.com/>
- The Lowe Down – <http://www.thelowedownblog.com>



Help! Oracle Forums

<http://forums.oracle.com/forums/forum.jspa?forumID=245>

How to Get Help on Forums:

- a. Search First, Ask Second
- b. Be someone (not user8840234)
- c. Be Specific

Help! – Oracle Community



- Oracle E-Business Suite -> BI Publisher

Forums

Community Contributed Resource Documents

examples: Troubleshooting Oracle XML Publisher

How To Install a Font Using XMLP Admin



Help! – My Oracle Support

Open an official SR

- BI Publisher is a powerful tool
- BIP is tightly integrated within R12
- Not all applications are utilizing what is considered to be the standard.
- Hopefully able to give a good intro to BIP in R12



Oracle EBS R12.1.3 Submit Request Delivery Options Button – FTP –



September

This is the

Part 1 – IP

Part 2 – IP

Part 3 – E

Part 4 – F

Today, the

Deliver t

IPP Print

Server:

Contact Information:

Brent Lowe

STR Software

brent.lowe@strsoftware.com

www.thelowedownblog.com

www.strsoftware.com

Help

OK

Cancel

- Conferences
- DataZing
- Development
- Oracle EBS
- Other
- Personalization
- June 2010
- May 2010
- April 2010
- March 2010
- February 2010
- January 2010