

# BI Publisher Reporting in Release 12 Tips and Techniques

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ORACLE CERTIFIED ADVANTAGE  
PARTNER

# Agenda

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- Functional Overview
- New and changed features in R12
- BI and OA Framework Integration
- BI Bursting in R12
- BI Data Templates
- XDOLOAD
- Tips & Techniques
- Knowledge Links & References
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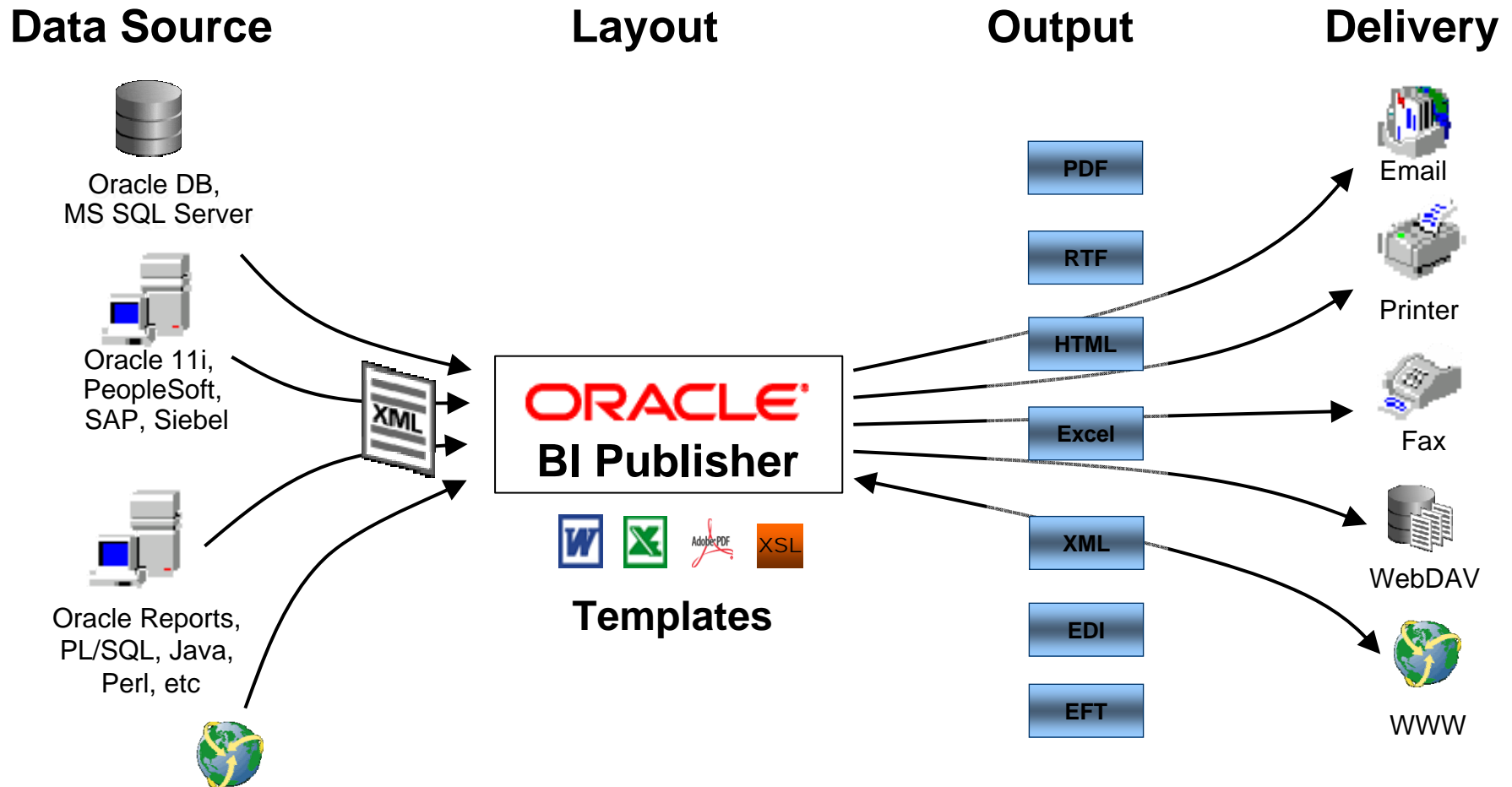
# About AST Corporation

- Oracle Certified Advantage Partner
- System integrator of choice for Corporations and Public Sector Organizations
- 100% success rate of Oracle E-Business projects that range from:
  - Planning
  - Assessment
  - Migration
  - Implementation
  - Training & Support
- [www.astcorporation.com](http://www.astcorporation.com)

# BI Publisher for R12 Offers

- Fast, scalable extraction engine
- Bursting Engine
- Many new template enhancements
- Book binding abilities
- Better performance
- Tighter integration

# BI Publisher Overview



# BI/XML Publisher and E-Business Suite Integration

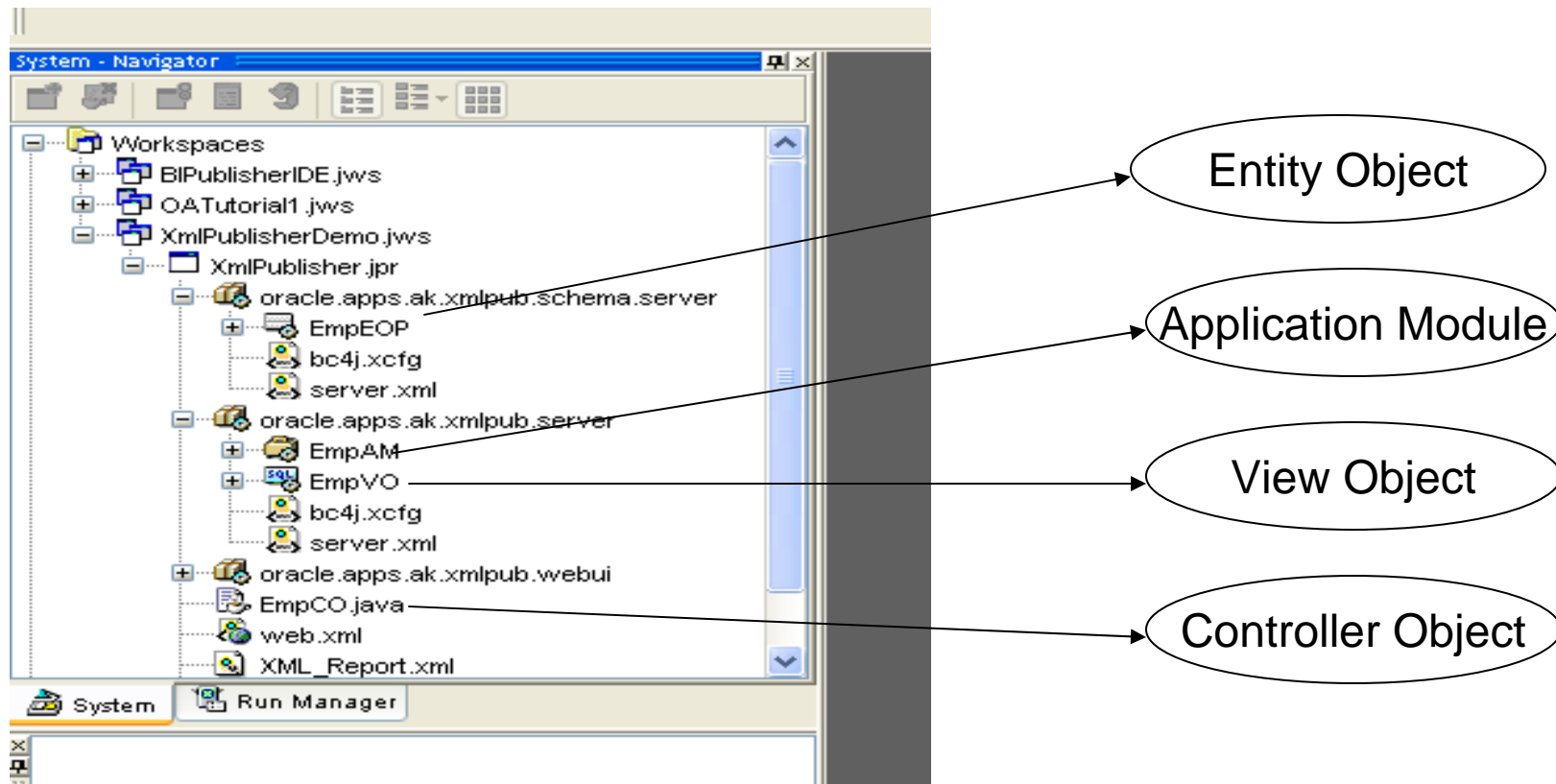
- BI Publisher + Oracle Reports
- BI Publisher + Data Templates
- BI Publisher + OA Framework
- BI Publisher + Bursting
- BI Publisher + Document View + QA Framework

# OA Framework and BI Publisher Integration

- Designing the OAF BC4J Model
- Designing the OAF Page and generating the Data XML
- Designing the RTF Template using Data XML
- Registering the Template with Oracle Applications
- Integrating the OAF Page with XML Publisher
- Invoking the report from OAF

# OA Framework and BI Publisher Integration

## 1. Designing the OAF BC4J Model



# OA Framework and BI Publisher Integration

## 2. Generating the XML for Template Design


```

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8 // -----
9 public class EmpAMImpl extends OAApplicationModuleImp
10 {
11     /**
12      *
13      * This is the default constructor (do not remove)
14      */
15     public EmpAMImpl()
16     {
17     }
18     public void initEmpVO()
19     {
20     EmpVOImpl vo = getEmpVO();
21     if(vo == null)
22     {
23     MessageToken errTokens[] = {
24     new MessageToken("OBJECT_NAME", "EmpVO1")
25     };
26     throw new OAException("AK", "FWK_TBX_OBJECT_NOT_FOUND
27     } else
28     {
29     vo.executeQuery();
30     }
31     }
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1880  
```

# OA Framework and BI Publisher Integration

3. Designing the RTF Template using Data XML
4. Registering the Template with Oracle Applications
5. Integrating the OAF Page with XML Publisher
6. Invoking the report from OAF


**XMI Publisher Demo**

View Employee Report 

Copyright (c) 2006, Oracle. All rights reserved.

**File Download - Security Warning** [X]

Do you want to open or save this file?

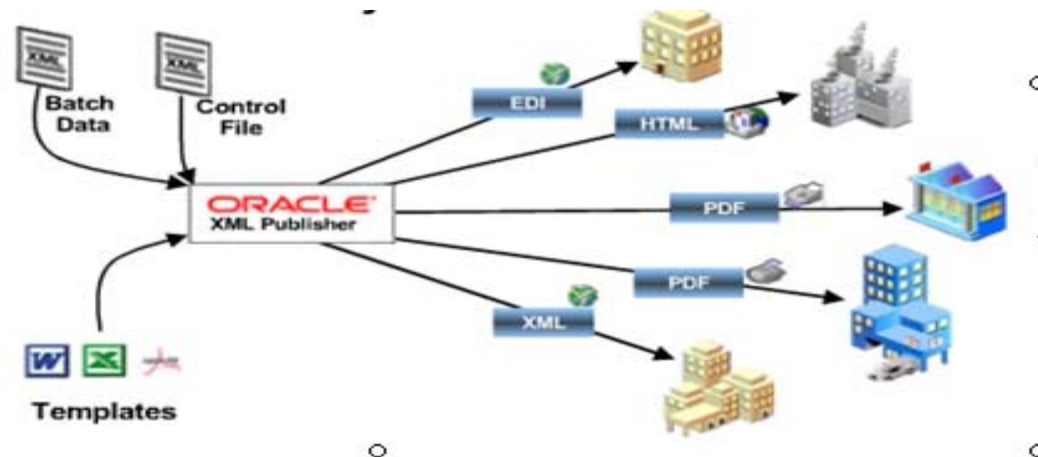
 Name: EmpReport.pdf  
Type: Adobe Acrobat Document, 11.0KB

Empno	ENAME	JOB	MGR	HIREDATE	DEPTNO	COMM
7369	SMITH	CLERK	7902	1980-12-17	20	
7499	ALLEN	SALESMAN	7698	1981-02-20	30	300
7521	WARD	SALESMAN	7698	1981-02-22	30	500

# Bursting in XML/BI Publisher

## Bursting Engine

- Burst individual documents from a batch
- Dynamic generation based on data
- Deliver in desired layout/output format
- Deliver down desired delivery channel



# Bursting in XML/BI Publisher

- Business Justification
  1. Parse the Purchase Orders .pdf into individual purchase orders for suppliers and email/fax them
  2. Checks to be attached to the Invoice/Payment screens as attachments

# Bursting in XML/BI Publisher

## Prerequisites and Patch Requirements

- Patch 5968876
- Version is 5.6.3

# Bursting in XML/BI Publisher

## Setup temp directory

XML Publisher Administrator > Administration > General

The screenshot shows the Oracle XML Publisher Administration interface. The 'Administration' tab is selected, and the 'Configuration' sub-tab is active. The 'Temporary directory' property is highlighted, showing a value of '/usr/tmp'.

Focus	Properties	Site Value
	[-] Properties	
	[-] General	
	Temporary directory	/usr/tmp
	[+] PDF Output	
	[+] PDF Security	
	[+] RTF Output	
	[+] HTML Output	
	[+] FO Processing	
	[+] RTF Templates	
	[+] PDF Templates	
	[+] XLIFF Extraction	

# Bursting in XML/BI Publisher

## Create Data Definitions

The screenshot displays the XML/BI Publisher Data Definitions interface. It is divided into two main sections, each showing a 'View Data Definition' page.

**Top Section: View Data Definition: Printed Purchase Order Report(Portrait)**

- General**
  - Name: Printed Purchase Order Report(Portrait)
  - Application: Purchasing
  - Code: POXPRPOP
  - Start Date: 09-Feb-2009
  - Description: Printed Purchase Order Report(Portrait)

**Bottom Section: View Data Definition: PO Terms and conditions**

- General**
  - Name: PO Terms and conditions
  - Application: Purchasing
  - Code: TCS
  - Start Date: 26-Aug-2008
  - Description: PO Terms and conditions

**Files Section:**

- XML Schema: Add File
- Data Template: Add File
- Preview Data: **TC.xml** Update File
- Bursting Control File: Add File

# Bursting in XML/BI Publisher

## Create Templates

XML Publisher Administrator > Templates

Templates >  
View Template: Printed Purchase Order Report(Portrait)

**General**

Name	Printed Purchase Order Report(Portrait)	Code	POXPRPOP
Application	Purchasing	Data Definition	Printed Purchase Order Report(Portrait)
Type	RTF	Start Date	26-Aug-2008
Default File	POXPRPOP.rtf	End Date	No
Default File Language	English	Subtemplate	No
Default File Territory	United States		

Description: Printed Purchase Order Report(Portrait)

**Templates | Data Definitions | Administration**

Templates >  
View Template: PO Terms and conditions

**General**

Name	PO Terms and conditions	Code	TCS
Application	Purchasing	Data Definition	PO Terms and conditions
Type	RTF	Start Date	26-Aug-2008
Default File	tcs.rtf	End Date	
Default File Language	English	Subtemplate	Yes
Default File Territory	United States		

Description: PO Terms and conditions

**Template Files**

Preview Format: PDF

**Localized Templates**

File Name	Language	Territory	Preview	Download	Update
tcs.rtf	English	United States			

Purchase Order Template

T&C is a sub template

Terms & Conditions Template

# Bursting in XML/BI Publisher

## Sample Template calling the sub template

The screenshot shows a complex XML/BI Publisher template for a purchase order. The template includes a header with the AST Corporation logo and address, a main body with fields for delivery date and vendor information, and a table for items. Two dialog boxes are overlaid on the template:

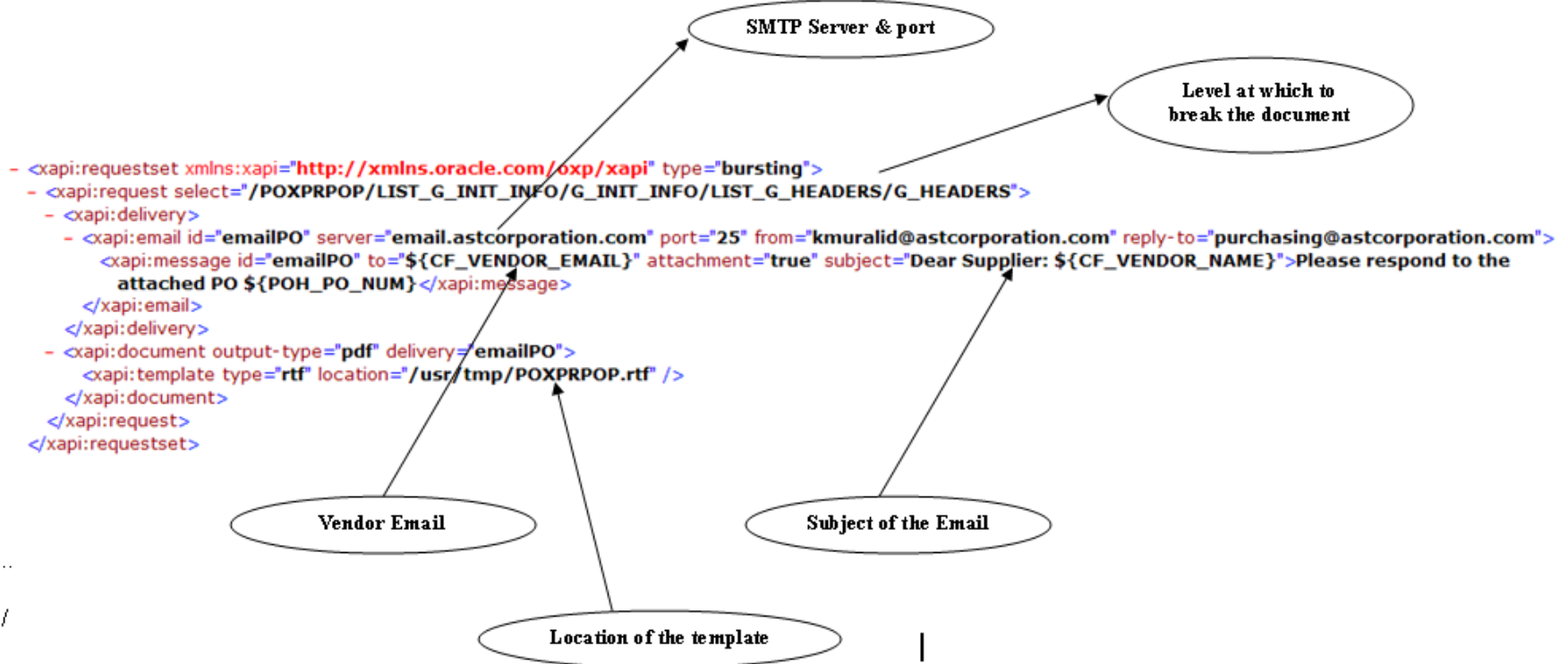
- Text Form Field Options:** This dialog is used to configure the properties of a text form field. It includes options for:
  - Type: Regular text
  - Default text: Import
  - Maximum length: Unlimited
  - Text format: (empty)
  - Run macro on: Entry and Exit (both empty)
  - Field settings: Bookmark: Text181
  - Options:  Fill-in enabled,  Calculate on exit
  - Buttons: Add Help Text..., OK, Cancel
- Form Field Help Text:** This dialog is used to define the help text for the form field. It includes:
  - Buttons: Status Bar, Help Key (F1)
  - Radio buttons: None, AutoText entry, Type your own: (selected)
  - AutoText entry dropdown: - PAGE -
  - Text area: `<&import:xd://PO.TCS.en.US?>`
  - Buttons: OK, Cancel

The background template shows various XML tags like `<?POH_PO_TYPE?>`, `<?POH_PO_NUM?>`, and `<?POH_REVISION_NUM?>`. It also features a table with columns for 'REQ #', 'REQUESTED BY', 'ITEM', and 'DESCRIPTION'.

`<?call: TCS?>`

# Bursting in XML/BI Publisher

## Sample Bursting Control File := PO Bursting.xml



# Bursting in XML/BI Publisher

## Uploading the bursting control file

XML Publisher Administrator > Data Definitions > "POXPRPOP"

View Data Definition: Printed Purchase Order Report(Portrait)

General	
Name	<b>Printed Purchase Order Report(Portrait)</b>
Application	<b>Purchasing</b>
End Date	
Description	<b>Printed Purchase Order Report(Portrait)</b>
Code	<b>POXPRPOP</b>
Start Date	<b>26-Aug-2008</b>
<input type="button" value="Update"/>	

Files	
XML Schema	<input type="button" value="Add File"/>
Data Template	<input type="button" value="Add File"/>
Preview Data	<b>POXPRPOP1.xml</b> <input type="button" value="Update File"/>
Bursting Control File	<b>PO_Bursting.xml</b> <input type="button" value="Update File"/>

# Bursting in XML/BI Publisher

Creating new “PDF publisher PO” to be able to print the Purchase Order duplex (i.e. the Terms& Conditions on the back side)

Step 1: create pasta\_pdf\_po.cfg

login to server and go to \$FND\_TOP/resource

make a copy of pasta\_pdf.cfg in the name of pasta\_pdf\_po.cfg

make the following changes (see in bold)

```
printCommand=lp -c -d{printername} -o media=letter -o sides=two-sided-long-edge
```

# Bursting in XML/BI Publisher

Step 2: Setup the driver

Printer Drivers

Driver Name: **PASTA\_PDF\_PO** User Driver: **Pasta PDF Driver PO**

Description:   
SRW Driver:   
Platform:   
Driver Method:   
• Command   
• Program   
• Subroutine   
Driver Method Parameters:   
 Spool File   
 Standard Input   
Program Name: **FNDPSTAX**

Arguments:   
Initialization:   
Reset:   
Editor:   
|pn\$PROFILES\$.PRINTER -f\$PROFILES\$.FILENAME -c\$PROFILES\$.CONC\_COPIES -   
Fpasta\_pdf\_po.cfg

OK Cancel Search

config file pasta\_pdf\_po.cfg

# Bursting in XML/BI Publisher

## Calling the bursting program

1. Calling the Bursting Program after 'Purchase order print' program is run

The screenshot shows the 'Submit Request' dialog box with the following fields:

- Run this Request... (Copy... button)
- Name: XML Publisher Report Bursting Program
- Operating Unit: (empty)
- Parameters: (empty)
- Language: American English

The 'Parameters' dialog box is open, showing:

- Request ID: (empty)
- DebugFlag: No

Buttons at the bottom of the 'Parameters' dialog include OK, Cancel, Clear, and Help. The 'Submit Request' dialog also has an Options... button at the bottom right.



# Bursting in XML/BI Publisher

Step 3: Setup the style

**Print Styles**

Style Name: **PDF PUBLISHER PO** Seq: **74**

User Style: **PDF Publisher PO**

SRW Driver:

Description:

Layout

Columns: **132** Rows: **55**  Suppress Header

Orientation:

Step 4: Update the style of the Purchase Order program definition

**Concurrent Programs**

Program: **Printed Purchase Order Report(Portrait)**  Enabled

Short Name: **POXPRPOP**

Application: **Purchasing**

Description: **Printed Purchase Order Report (Portrait)**

Executable

Name: **POXPRPOP** Options:

Method: **Oracle Reports**

Request

Type:

Incrementor:

MLS Function:

Use in SRS  Allow Disabled Values

Run Alone  Restart on System Failure

Enable Trace  NLS Compliant

Output

Format: **XML**

Save (C)

Print

Columns:

Rows:

Style: **PDF Publisher PO**

Style Required

Printer:

Copy to... Session Control Incompatibilities Parameters

# Bursting – Attaching Accounts Payables Checks as attachments on the Invoice Workbench

1. Input the Invoice and pay the invoice

Invoice Workbench (Public Sector Payables Manager)

Batch Control Total  Batch Actual Total

AP ENTRY DEFAULT

Type	PO Number	Supplier Name	Supplier Num	Supplier Site	Invoice Date	Invoice Num	Invoice	Invoice Amount	Tax Amount	Tax Control Ar
<input checked="" type="checkbox"/> Standard		US BANK	4506	ST LOUIS-1	10-OCT-2008	10-OCT-2008-1	USD	421.62	<13.18>	

1 General    2 Lines    3 Holds    4 View Payments    5 Scheduled Payments    6 View Prepayment Applications

Summary

Items	434.80
Retainage	
Prepayments Applied	

Amount Paid

USD	421.62
USD	421.62

Status

Status	Validated
Accounted	Yes
Approval	Not Required

# Bursting – Attaching Accounts Payables Checks as attachments on the Invoice Workbench

## 2. Run the Bursting Program

The screenshot shows the 'Submit Request' dialog box in Oracle Applications. The 'Name' field is 'XML Publisher Report Bursting Program'. The 'Parameters' dialog is open, showing 'Request ID' and 'DebugFlag' set to 'No'. The 'Upon Completion...' section has 'Save all Output Files' checked, 'Layout' set to 'Bursting Status Report', and 'Print to' set to 'noprint'.

# Bursting – Attaching Accounts Payables Checks as attachments on the Invoice Workbench

## 3. Run the Custom Program

**Submit Request** [X]

Run this Request...

Name **XX Attach Checks to Invoice Wkb** [Copy...]

Operating Unit [ ]

Parameters [ ]

Language **American English** [Language Settings... [Debug Options]

At these Times...

Run the Job **As Soon as Possible** [Schedule...]

# Bursting – Attaching Accounts Payables Checks as attachments on the Invoice Workbench

## 4. View the attachment on the Invoice Workbench

The screenshot shows the Oracle Invoice Workbench interface. The main window displays an invoice for US BANK with invoice date 10-OCT-2008 and amount 421.62. Below the invoice, the 'Attachments' section shows a file named 'ASTCHECK-859013.pdf' attached to the invoice. The 'Attachments' table is as follows:

Main	Source	Seq	Category	Data Type	File or URL
10	Miscellaneous			File	ASTCHECK-859013.pdf

The 'Attachments' section also shows the following details:

- Entity Name: Invoice
- Open Document... button

The check image on the right is for AST CORPORATION, dated 07-08-2009, for \$421.62. The check number is 859013. The check is payable to US BANK, CORPORATE PAYMENT SYSTEMS, PO BOX 790415, ST LOUIS, MO 63179.

# Data Templates in XML/BI Publisher

## *Some advantages of Data Templates over RDF Reports*

- Ease of use
- Displaying Reports in real-time (generating xml is real-time as against RDF report when xml is generated only when concurrent request is submitted)
- Multiple integration points
- Integration with multiple data sources
- No binary conversions
- Eliminates layout issues & ambiguous errors (signal 11)

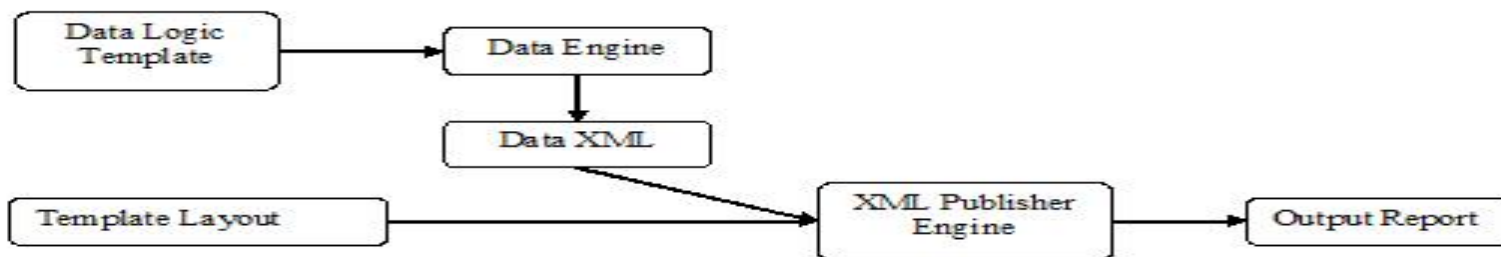
# Data Templates in XML/BI Publisher

## *Main elements of Data Template*

- Data Query → SQL Query
- Parameters → by which to restrict the SQL Query
- Data Structure → Definition of the Output XML Structure
- Data Triggers → Triggers that should be executed before or after the data query execution

See Example:- [datatemplate-pa.xml](#)

### XML Publisher Data Template Architecture



```

- <dataTemplate name="dataTemplateName" description="Template description"
  defaultPackage="employee" version="1.0">
  Define Parameters
  <parameters>
    <parameter name="department" dataType="character" defaultValue="10"/>
  </parameters>
  Define Data Query
  <dataQuery>
    - <sqlStatement name="Q1">
      SELECT EMPNO,ENAME,SAL from emp where deptno=:department
    </sqlStatement>
  </dataQuery>
  Define Triggers
  <dataTrigger name="beforeReport" source="employee.beforeReportTrigger"/>
  Define Data Structure
  <dataStructure>
    - <group name="G_EMPLOYEE" source="Q1">
      <element name="EMPLOYEE_NUMBER" value="EMPNO"/>
      <element name="NAME" value="ENAME"/>
      <element name="SALARY" value="SAL"/>
    </group>
  </dataStructure>
</dataTemplate>

```

# Data Templates in XML/BI Publisher

Step 1: Design the Data Template XML File  
[datatemplate-pa.xml](#)

Step 2: Create the Data Definition in XML Publisher and  
associated it with Data Template

XML Publisher Administrator > Data Definitions

**General**

Name: **XX Projects Details Report** Code: **XXPRJDETAIL**  
Application: **AST CORPORATION** Start Date: **04-Mar-2009**  
End Date:   
Description: **XX Projects Details Report**

**Files**

XML Schema

Data Template: **datatemplate-pa.xml**

Preview Data

Bursting Control File

Here is where the data template xml is uploaded

# Data Templates in XML/BI Publisher

Step 3: Define a Concurrent Program to generate the Data XML File

**Concurrent Programs**

Program: **XX Projects Details Report**  Enabled

Short Name: **XXPRJDETAIL**

Application: **AST CORPORATION**

Description: **XX Projects Details Report**

**Executable**

Name: **XDODTEXE** Options: \_\_\_\_\_

Method: **Java Concurrent Program**

**Request**

Type: \_\_\_\_\_

Incrementor: \_\_\_\_\_

MLS Function: \_\_\_\_\_

Use in SRS  Allow Disabled Values

Run Alone  Restart on System Failure

Enable Trace  NLS Compliant

**Output**

Format: **XML**

Save (C)

Print

Columns: \_\_\_\_\_

Rows: \_\_\_\_\_

Style: **PDF Publisher**

Style Required

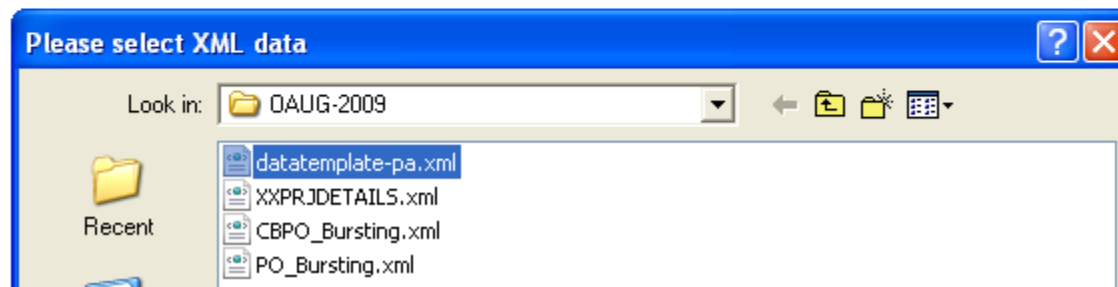
Printer: \_\_\_\_\_

# Data Templates in XML/BI Publisher

Step 4: Define the RTF Template using the Generated Data XML

## *XX Projects Details Report*

<i>Project Num</i>	<i>Project Name</i>	<i>Task #</i>	<i>Quantity</i>	<i>Amount</i>	<i>Total Qty</i>	<i>Total Amt</i>
F PRJ_NUM	PROJECT_NAME	F TASK_NUM	F QTY E	AMT E	TOTAL_QTY	TOTAL_AMT E



# Data Templates in XML/BI Publisher

## Step 5: Registering the Template with XML Publisher

Templates >  
View Template: XX Projects Details Report

**General**

Name	XX Projects Details Report	Code	XXPRJDETAILS	<a href="#">Update</a>
Application	City of Burbank	Data Definition	XX Projects Details Report	
Type	RTF	Start Date	03-Mar-2009	
Default File	XXPRJDETAILS.rtf	End Date	04-Mar-2009	
Default File Language	English	Subtemplate	No	
Default File Territory	United States			

Description: XX Projects Details Report

**Template Files**

Preview Format: PDF

**Localized Templates**

File Name	Language	Territory	Preview	Download	Update
XXPRJDETAILS.rtf	English	United States			

Template Loaded here

# Data Templates in XML/BI Publisher

Step 6: Execute the concurrent program to generated the PDF Report

Submit Request

Run this Request... Copy...

Name: **XX Projects Details Report**

Operating Unit: \_\_\_\_\_

Parameters: \_\_\_\_\_

Language: **American English**

Parameters: \_\_\_\_\_

Project #: **16696**

At these Times... Run the Job As So

## XX Projects Details Report

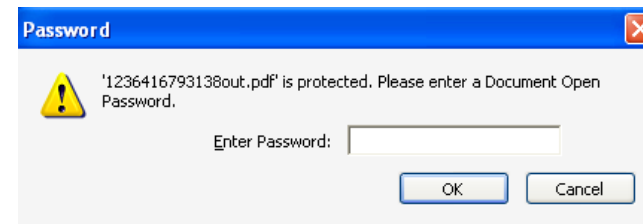
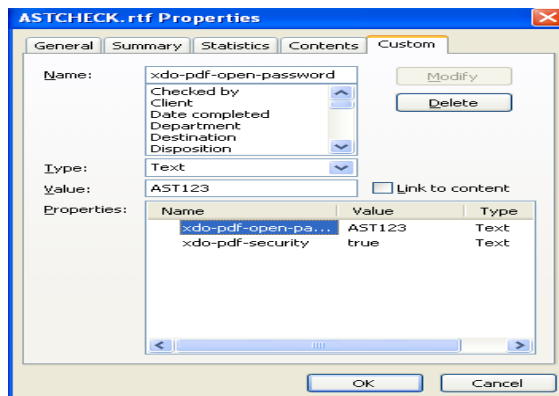
<i>Project Num</i>	<i>Project Name</i>	<i>Task #</i>	<i>Quantity</i>	<i>Amount</i>	<i>Total Qty</i>	<i>Total Amt</i>
16696	ERP PROJECT	2			4266056.41	5562529.9
		3	64479.01	64479.01		
		1	2053.16	2053.16		
		1				

# Tips and Techniques

## Password Protect BI Reports

Go to Template Properties (File > Properties)

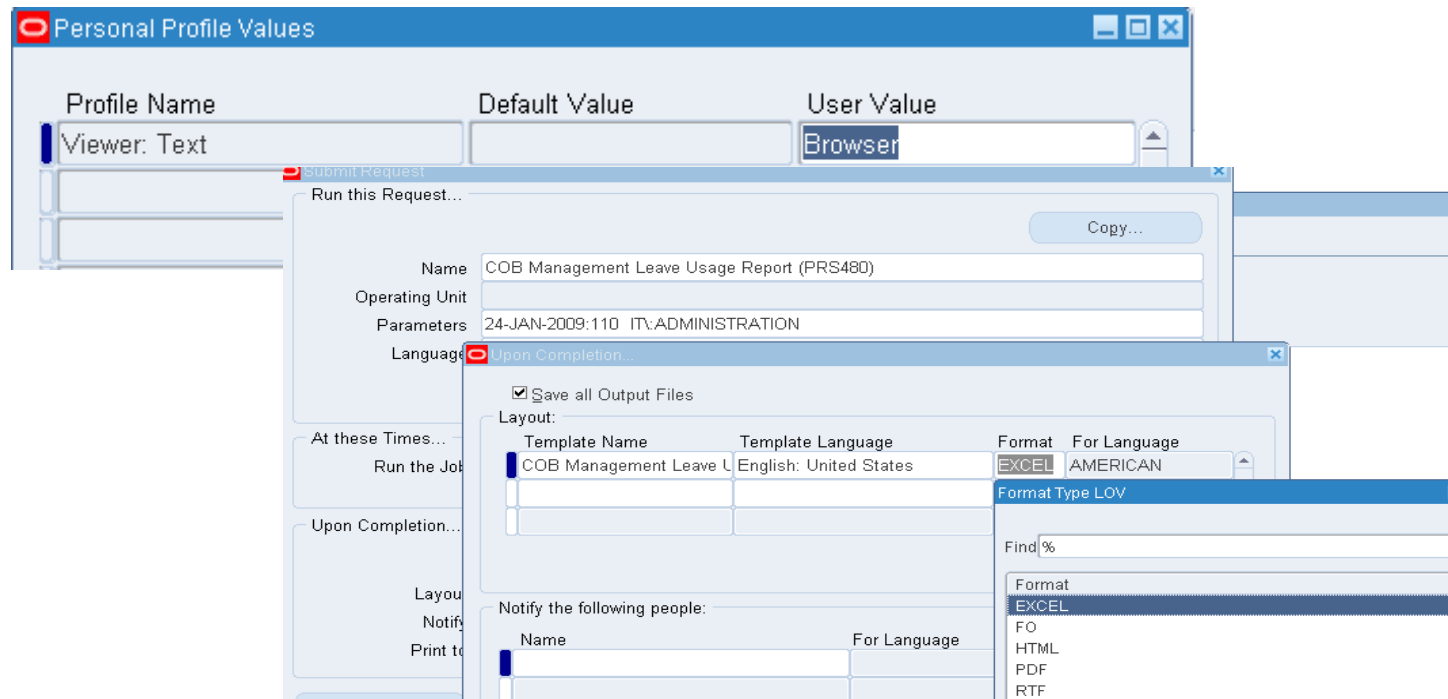
	Custom Property Name	Type	Value
1	xdo-pdf-open-password	text	Hard code/read from xml data
2	xdo-pdf-security	text	true



# Tips and Techniques

## BIP Report Output to Excel

Setup the Viewer: Text Profile to 'Browser'



# Tips and Techniques

## Migration of BI/XML Publisher Reports from one instance to another

- FNDLOAD and
- XDLOAD to move definitions in BIP across different instances

# Contact Information

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# References

Metalink

Tim Dexter's BI Publisher Blog

Anil Passi's BI Publisher Blog

BI Publisher User Guide

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# Questions and Open Discussion

