

BI Publisher Quick Start Guide

Karen Brownfield
Susan Behn
Solution Beacon, LLC

Reports provided with Oracle Applications are not often in a format that is required by the end users. The data is there, but the users need it in a different format or need to add logos, graphs and/or other material not included in the seeded report. Unfortunately, modifying the underlying Oracle Report is difficult, time consuming and requires extensive knowledge of the tool used to develop the report. BI Publisher removes this limitation. BI Publisher separates the extract of the data from the presentation of the data. While BI Publisher also provides the ability to extract the data, this presentation will focus on using a standard report from Oracle E-Business Suite and using BI Publisher to tailor the look of the report without customizing Oracle's code.

Overview

BI Publisher separates extracting data from the database from the presentation of that data in a report. This provides several advantages:

- The same data file can be used for multiple reports.
- Output can be set to be Word, PDF, Excel, XSL-FO, XML without changing program that extracted the data.
- Anybody proficient in Word, Excel can design the output.

The program that produces the XML file is called the Data Template. The portion of BI Publisher that takes the XML file as input and creates the report is the Report Template or Presentation Template. Since both pieces have template in the name, this can cause confusion.

Any tool that can output XML can create the Data Template. This can be Oracle Reports, JDeveloper, PL/SQL, etc. Data Templates can even contain embedded SQL to do further extracts.

Presentation Templates cannot create XML, cannot contain SQL, and cannot add data to the template. Within limits, they can reorder the data, can reformat it, and add conditions to exclude data in the XML file.

Presentation Templates can be created with common desktop tools like Microsoft Word or Adobe Acrobat. BI Publisher works with Office 2000, 2003 and 2007. This paper will use Microsoft Word 2007 to build the sample template. If you are using Office 2000 or 2003, the menus will be slightly different.

There are three versions of BI Publisher. One version is the Desktop version, more commonly called the Template Builder. This is the add-in to Word or Adobe that allows you to build the templates. You can download the Enterprise version of the desktop BI Publisher from OTN (current version is 10.1.3.4) and use it against the E-Business Suite embedded version as long as you don't need to use pivot tables. Or you can download the E-Business Suite client side version from MetaLink. This will actually download version 10.1.3.2 of the Enterprise version. This presentation will be using the E-Business Suite BI Publisher Desktop.

The other two versions reside on the database and are also called the Processing Engine. One is embedded in E-Business Suite. You may also hear this version referenced as XML Publisher or BI Publisher 5.6.3. This version of BI Publisher is included in your E-Business Suite license as long as you do not reference any custom tables or any custom columns added to Oracle tables.

The second version that resides at the database level is BI Publisher Enterprise Edition. This version allows you to use any field in any table, but requires additional licensing.

Whether you use the E-Business Suite embedded version or the Enterprise version, it is this processing engine that merges the XML data with the Presentation or Report Template. The following three diagrams represent how the processing engine works.

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