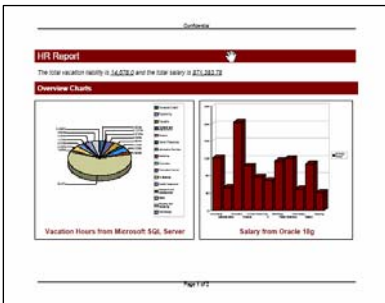


Oracle XML Publisher Enterprise

An Oracle White Paper
May 2006



BI Style Reports

The screenshot displays an Oracle Financials report with a detailed table of transactions. The table includes columns for Date, Amount, and Description, showing various financial entries.

Financial Reports



Checks

The screenshot shows a W-2 Wage and Tax Statement for the year 2003. It includes fields for wages, taxes, and other financial information.

Government Forms (W2)

EXECUTIVE OVERVIEW

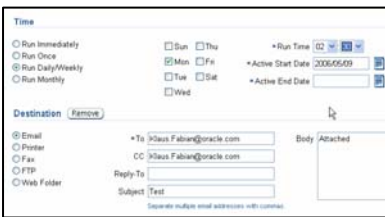
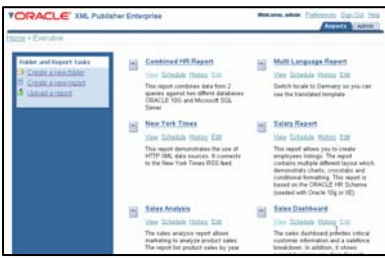
Oracle XML Publisher Enterprise is Oracle’s revolutionary new reporting and document output management solution. XML Publisher offers multiple innovations that substantially lower the total cost of ownership for reporting solutions, such as:

- End user desktop applications — Microsoft Word, EXCEL and Adobe Acrobat Professional — allow functional users to define and customize the layout of documents. This results in a more efficient cooperation between IT and functional departments and reduces the need for external consultants.
- A single web-based solution for producing and delivering a broad range of business documents such as: sales orders, invoices, purchase orders, management and financial reports, government forms, checks, labels, and electronic documents (EDI/EFT). Since Oracle XML Publisher can replace multiple systems, it results in less complex and easier to maintain solutions.
- XML Publisher facilitates the global consolidation of your reporting solutions. A single instance supports multiple user interface and document languages. The same user can create documents in English, German, Chinese or Arabic (bi-directional) and print them to a local or remote printer.
- XML Publisher reduces report customization and maintenance cost – due to the separation of data extract, layout, and translation. For examples changes to a report query require you to change only a single report file and none of the layouts or translations of this report.

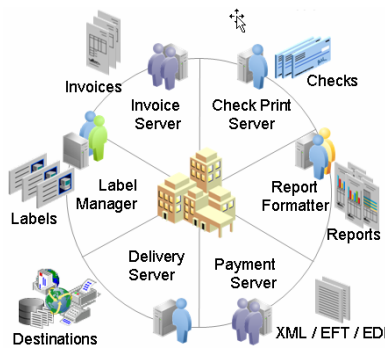
Oracle XML Publisher is “hot pluggable” - meaning it is completely based on open standards. As such it can run on any J2EE compliant application server and can access data from practically any database. This makes XML Publisher fit into any IT environment and protects your investment into legacy systems.

INTRODUCTION

Oracle XML Publisher was originally developed to solve the reporting problems faced by Oracle Applications. It was first released with Oracle E-Business Suite 11.5.10 in 2003. In the last 2 years XML Publisher has matured and now satisfies all reporting requirements for Oracle Applications. Impressed by its capabilities, the



**XML Publisher Enterprise:
Repository, Report Viewer and
Scheduler**



**Solutions that can be consolidated
with Oracle XML Publisher Enterprise**

J.D. Edwards EnterpriseOne application has just integrated with XML Publisher and Peoplesoft Enterprise will uptake XML Publisher in the next release.

Many customers outside of Oracle Applications face the same reporting issues. On the Oracle World 2004 customers asked us for a standalone version of XML Publisher. XML Publisher Enterprise was developed for these customers with no dependency on Oracle Applications.

It is a complete web-based reporting application that allows user to:

- Manage reports in a folder structure
- Create reports combining multiple databases as well as web services
- Define the report layout in Microsoft Word or Adobe Acrobat
- Connect from Microsoft EXCEL to XML Publisher reports
- Extract and translate the boilerplate text in reports
- Schedule and deliver reports via a variety of delivery channels such as email, fax, or print

All XML Publisher solutions – the ones embedded into Oracle applications as well as XML Publisher Enterprise – offer multiple innovations that will be covered in the following sections.

COMPLETE SOLUTION

A typical enterprise has to create such diverse documents as invoices, purchase orders, sales orders, financial and management reports, government forms, checks, labels and electronic documents. These documents need to be delivered to customer, supplier and partners by email, fax, or print and stored in an archive or document management system. XML Publisher provides a complete solution for creating, managing and delivering all your business documents.

Before XML Publisher, no single solution was able to satisfy all these requirements. As a result many business – including Oracle – were required to maintain several reporting solutions: invoice server, a label print server, a report server, a check print sever, a fax server, etc...

XML Publisher allowed Oracle’s IT department to consolidate their printing solution and retire multiple third party solutions. Since then, many of Oracle’s customers were able to consolidate their printing and document management solution by replacing multiple systems with XML Publisher.

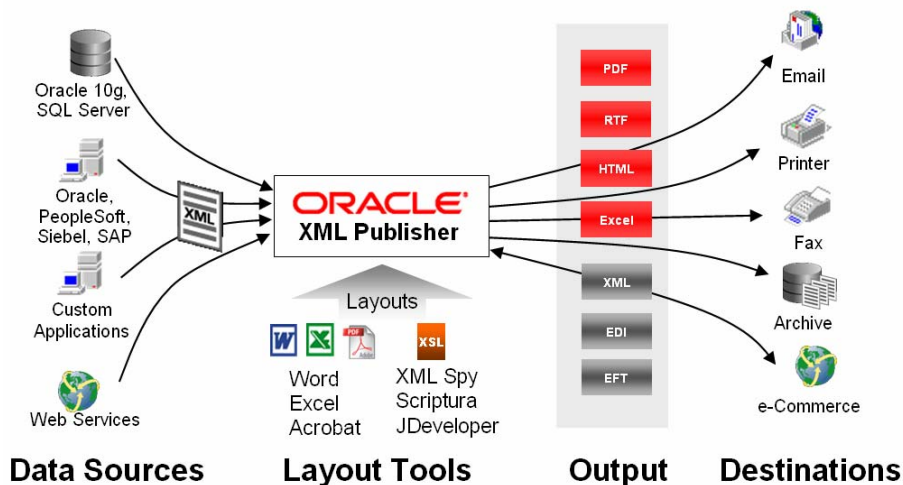


Figure 1: XML Publisher Capabilities



Label Including Bar Code

The picture above gives an overview of the many capabilities of XML Publisher. XML Publisher Enterprise can get the data from multiple sources and combine them in a single report. XML Publisher can access databases (using SQL) or access data from web services or a website that provide XML data.

The data can be formatted with end user layout tools (see below) or using XSL-FO stylesheets – an open W3C standard supported by many third party tools. Layouts may contain any kind of fonts – including MICR fonts for check printing or bar code fonts for label printing.

The report output can be formatted as PDF for printing, Microsoft Word readable RTF files for modifiable documents (contracts, marketing letter...), EXCEL readable files (financial reports) as well as HTML that you may sent by email or publish to a website. Oracle XML Publisher can also generate machine readable output formats such as XML, EFT or EDI.

These output files can be delivered by email, fax or print. They can also be stored in an external archive or document management system. All these capabilities are provided by a single system.

END USER LAYOUT TOOLS

Oracle XML Publisher allows functional users to design report or document layouts in familiar desktop applications. Your users can choose from the following tools the one that matches the task at hand:

- Microsoft Word with the Oracle XML Publisher Template Builder
- Microsoft Excel with the Oracle XML Publisher Analyzer for EXCEL
- Adobe Acrobat Professional

Each tool has its unique advantages to create specific reports. For example most end users would create customer letters such as marketing material or dunning

“For example, with 18 variations of our AR Invoice, we were able to put the templates in the control of a functional analyst, while a programmer was only needed to make small data model extensions to the RDF. For the most part, template changes were able to be turned around in minutes, and retested within the same session.”

**—Mike Tobin,
IT Manager, QUALCOMM, Inc.**

letters in Microsoft Word. Members of a finance team would like to create layouts in Microsoft Excel, while governments typically provide PDF forms.

Template Builder for Microsoft Word

With a classic reporting tool a functional user would prototype a dunning letter in Microsoft Word and then writes a requirements document – possibly with the help of an IT analyst. An IT developer then would have to recreate the document in a report development tool trying to match the requirements. There would be a lot of communication between these two parties trying to perfect the layout and behavior of the report before it could actually be delivered to the report consumers.

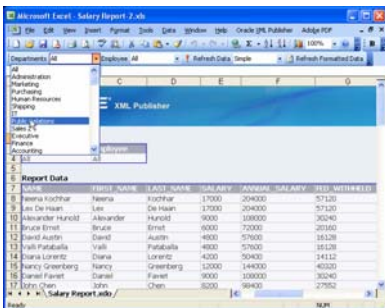
With Oracle XML Publisher the functional user can provide the Microsoft Word file to the IT developer as the layout specification. The IT developer just needs to mark up the document using the Template Builder for Word Add-In.

In many cases, experienced end users were able to insert data fields into Word documents without any help from the IT department. Changes to the format such as replacing the company logo, changing column width, fonts or boilerplate text can be performed solely in Microsoft Word – requiring no additional training. The template builder add-in allows end users to mark up word documents easily with charts, data tables and calculations.

In addition, the IT department can hide standard XSL code in word documents – invisible to the functional users – that may perform sophisticated functions such as conditional execution, data transformations and complex calculations.



XML Publisher Template Builder for Word



XML Publisher Analyzer For EXCEL

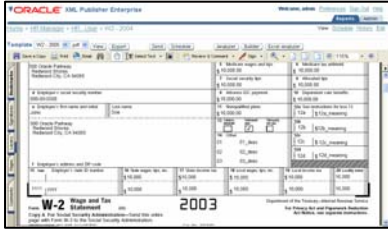
Analyzer for EXCEL

The Oracle XML Publisher Analyzer for EXCEL allows you to connect EXCEL spreadsheet with live report data using a secure web service connection. The user can change parameters from a toolbar and refresh the data any time.

It offers the following advantages compared to other solutions:

- The end user can change report prompts and refresh the data based on the new parameters.
- The end user connects to the XML Publisher Enterprise server using their username and password. It is a secure solution that does not require end user access to the operational database.
- The spreadsheets can apply any kind of EXCEL functionality to the report data – including formulas, pivot tables, and macros.
- The Add-In can be installed on demand and is very easy to use.

The Oracle XML Publisher Analyzer for EXCEL is the ideal solution for end users that work daily in EXCEL and need to access data in their tool of choice.



W2 PDF Form filled out with XML Publisher

PDF Forms

Many government agencies around the world – for example the US internal revenue service – now publish their forms as PDF forms on the internet. For example US agencies provide tax forms, government purchase forms, and grant applications as PDF forms.

With a classical reporting tool the IT department needs to recreate the report in a report design tool. This can be tedious task taking weeks to match the government forms up. Any mistake can result in rejection by the government, expensive deployment delays, and rework.

XML Publisher contains a complete PDF form engine that allows you to map data fields to the form fields by simply changing the names of the PDF form fields to match the data field names. This process is so much easier that even government agencies are adopting XML Publisher.

GLOBAL REPORTING SOLUTION

Many reporting solution are not suitable for a global deployment, requiring international offices to use their own reporting and document management solutions. XML Publisher was developed from the start for global deployment.

- XML Publishes ships with a complete set of Unicode fonts that include simplified and traditional Chinese, Japanese and Korean.
- XML Publisher has extensive support for bi-directional languages such as Arabic or Hebrew.
- XML Publisher supports international date, time and number formats as well as different calendars.

A single instance of XML Publisher allows users to print their report in multiple languages – supporting even different translation for British or American English. PDF documents generated by XML Publisher contain all characters required to print the document on any printer. As a result, you can print a Japanese document even in the US office that may not have a printer with a Japanese character set.

Creating multiple language reports with XML Publisher is easy. The functional users just creates a document in Microsoft Word – XML Publisher extracts all the boilerplate text from the document into an industry standard translation file (XLIFF) that is understood by any translation service or translation software package. Dates, times and currency can be defined in a language and territory independent way. For bi-directional languages such as Arabic and Hebrew translation, XML Publisher will automatically adjust the direction of the text to match the requested locale for the document.

All these innovations allow you to consolidate the generation of your reports and business documents to a single system – or even a single instance. One XML Publisher customers uses our solution to create their invoices and sales order for all of Europe on a single server.

Dear Sirs/Madam,

According to our records as of Thursday, January 1, 2004, we show balances.

Your CAD balance is 31,500.00 made up as follows:

Invoice Number	Date	Amount
502444	Dec 8, 2003	19,125.00
502445	Dec 8, 2003	12,375.00

各位

2004年1月1日 Thursday 日付の御社の残高は次の通りです。

御社の CAD の残高は 31,500.00 で、詳細は以下の通りです。

請求書番号	日付	請求金額
502444	2003/12/06	19,125.00
502445	2003/12/06	12,375.00

السادة،

حسب سجلاتنا حتى تاريخ ٠١ January, ٢٠٠٤ فاننا نظهر الارصدة ان رصيدك ب CAD هو ٣١,٥٠٠.٠٠ مفضلاً كما يلي:

رقم الفاتورة	التاريخ	المبلغ
٥٠٢٤٤٤	٠٦/١٢/٢٠٠٣	١٩,١٢٥,٠٠٠
٥٠٢٤٤٥	٠٦/١٢/٢٠٠٣	١٢,٣٧٥,٠٠٠

English report fragment - translated to Japanese and Arabic.

office on the server. You may run XML Publisher on any inexpensive Linux operating system.

- XML Publisher can access practically any database – Oracle9i or 10g, Microsoft SQL sever, IBM DB2 or MySQL - using the JDBC standard.
- XML Publisher can be deployed on any J2EE compliant application server such as Oracles AS 10g, Apache Tomcat 5.x, IBM Websphere or BEA Weblogic.
- XML Publisher supports authentication through LDAP
- XML uses XML as a data format and supports the W3C standard XSL-FO stylesheets for formatting. Thus any design tool based on XSL-FO will work with XML Publisher – as will any existing stylesheets. You can rely on existing resources and consulting know-how.
- Translation files are extracted from Microsoft Word documents as industry standard XLIFF files that are understood by most translation software packages and companies.
- The XML Publisher Template Builder for Word and Analyzer for EXCEL do support Office 2000 and later. Templates created in Microsoft Word are uploaded as RTF files – allowing some support for alternative Word processors.

Performance

XML Publisher has shown to be capable of rendering 10,000 invoices on a single CPU, process 6 GByte of XML data and render 50,000 page documents.

The XML Publisher team invested a significant effort working with the Oracle performance team to create one of the fastest and most scalable reporting solutions available. The team is convinced that performance is a factor that makes or breaks XML Publisher.

Many XSL based solutions are inefficient and memory hungry. The XML Publisher team worked closely with the performance team to create the fastest and most efficient XSL-FO implementation to our knowledge.

The Oracle Financials team tested XML Publisher with 6 GByte of XML data to generate a 50,000 page PDF document, since some governments require companies to print out their books on paper. XML Publisher was able to generate the document on a single process PC in less than 50 minutes.

The Siebel Analytics team tested XML Publisher as a replacement for Apache FOP. After XML Publisher generated 5000 emails in less than 20 minutes, the team was convinced that XML Publisher is the better solution.

One of our customers is rendering more than 20,000 multi-page documents per hour on a 4 processor server based on pre-extracted XML. In stress tests XML Publisher could render more than 10,000 documents an hour on a single CPU.

Security

XML Publisher supports role based security and allows the administrator to give users access to individual folders and roles such as end user, development, scheduling and administration privileges.

Authentication is possible against XML Publishers own security or an LDAP server. XML Publisher security allows small installations such as development or small business instances to run without setting up an LDAP server. Enterprise installations can rely on single sign-on based on a centralized LDAP server.

PDF documents generated by XML Publisher can be secured. XML Publisher can be configured to password protect documents, remove or protect form fields or protect documents against changes.

CONCLUSIONS

Oracle XML Publisher is a new, innovative reporting and output management solution that is designed to lower the total cost of ownership of reporting and document output management. In summary, you will benefit from XML Publisher the following ways:

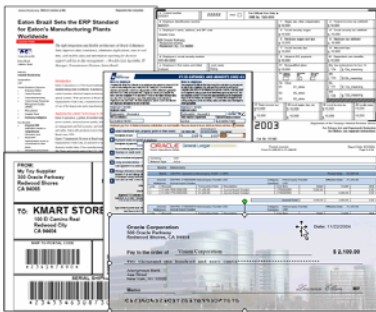
- Deploy reports faster and lower your dependence on consulting services
- Consolidate your reporting and document output management solution
- Consolidate reporting and output management internationally.
- Reduce the associated maintenance cost.
- Protect your investment in existing IT infrastructure.

We hope that the XML Publisher addresses your reporting pain points and that you will come to the same conclusion as many other customers who have seen a demonstration: *XML Publisher is exactly what I need.*

Additional information can also be found at:

<http://www.oracle.com/technology/products/applications/publishing/index.html>

Please contact your Oracle sales representative to schedule a demonstration of Oracle XML Publisher.



Marketing material, invoices, financial reports, government forms, checks, and labels - generated by XML Publisher



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