

TRANSFORMING your REPORTS with XML PUBLISHER

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...bringing finance systems to life

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TRANSFORMING YOUR REPORTS WITH XML PUBLISHER

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PRESENTATION OUTLINE

| | |
|---------------|--------------------------------|
| | Introduction |
| How to do it | The 7 Steps – simple example |
| | Improving the example |
| | Using BI publisher add-in |
| | Questions /Knowledge sharing |
| Going further | Converting existing GL reports |
| | Going further with templates |
| | Output format tips |

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WHY XML PUBLISHER?

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Great Output Using XML Publisher : BeLife.co.uk : January 2008

- Anything you can design in Word
 - Tables, charts, conditional formatting, fonts, watermarks, sub templates, graphs
 - get users to do it
- Single input multiple output
 - (PDF, Excel, HTML, FO, RTF)
- Presentation & Data layer (R12)
- Oracle supported product – not 3rd party



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WHY XML PUBLISHER?

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| Questions/Knowledge sharing |

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Vision Operations (USA)

Account Analysis Report
Entry Item
Period: Jan-03 To Adj-03

Report Date
Page

Currency: USD
Accounts From: 01-000-1210-0000-000
To: 01-000-1210-0000-000
Balance Type: Actual
Period: Jan-03

| Source | Category | Batch Name | JE Name | Accounting Flexfield | Description | Entry Item | Debits | Credits |
|--------------------------|----------|------------|---------|----------------------|-------------|------------|--------|---------|
| Total for Period: Jan-03 | | | | | | | | |

Beginning Balance: 97,598,047.49 DR

Ending Balance: 118,694,467.86 DR

□

Vision Operations (USA)

Account Analysis Report
Entry Item
Period: Jan-03 To Adj-03

Report Date: 02-JAN-2008 11:15
Page: 2 of 13

Currency: USD
Accounts From: 01-000-1210-0000-000
To: 01-000-1210-0000-000
Balance Type: Actual
Period: Feb-03

| Source | Category | Batch Name | JE Name | Accounting Flexfield | Description | Entry Item | Debits | Credits |
|--------------------------|----------|------------|---------|----------------------|-------------|------------|--------|---------|
| Total for Period: Feb-03 | | | | | | | | |



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| | A | B | C | D | E | F | G | H | I | J | K | L | M |
|----|---|-----------------------------------|-----------------------|---|---|---|---|---|---|---|---|---|---|
| 1 | | Parted Journals | Report Date: 8-Jan-08 | | | | | | | | | | |
| 2 | | Period: From SEP-0506 to SEP-0506 | Page: 1 of 1 | | | | | | | | | | |
| 3 | | | | | | | | | | | | | |
| 4 | | Currency: GBP | | | | | | | | | | | |
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TRANSFORMING YOUR REPORTS WITH XML PUBLISHER

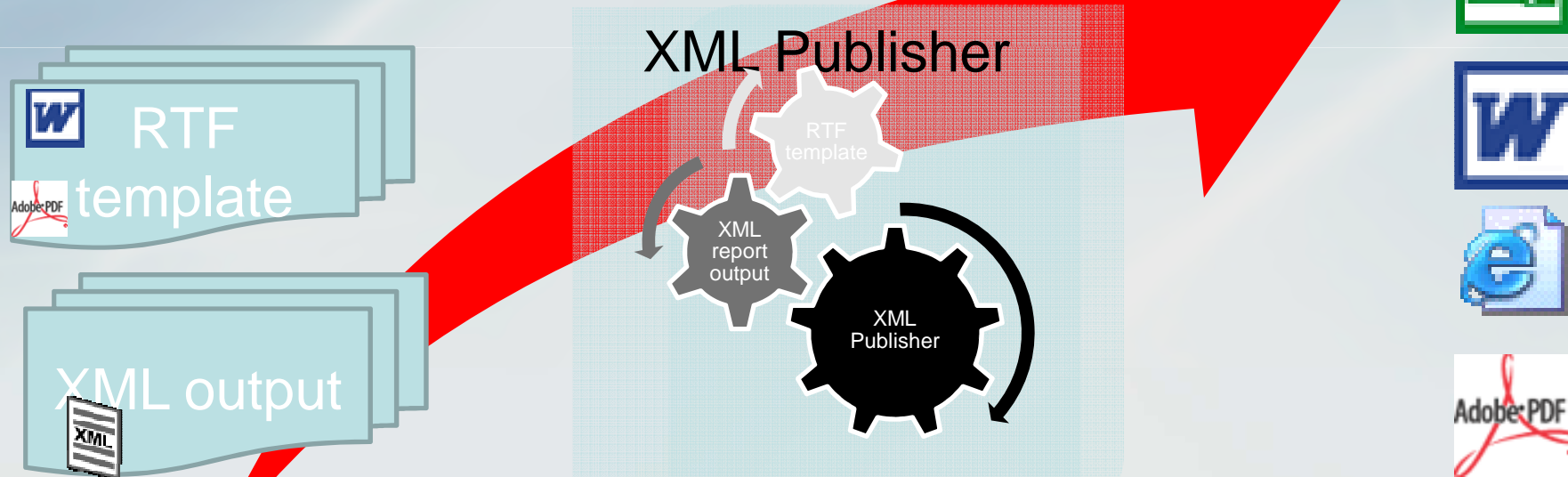
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WHAT IS XML PUBLISHER?

- XML is universal, self describing language allowing system defined 'tags'
- Separates format from content

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THE SEVEN STEPS – SIMPLE EXAMPLE

Get the Output

1. Chose the report & save output
2. Change output to XML format
3. Save the XML output

Make the template

4. Create an *.RTF template
5. Create a “data definition”
6. Create a “template”

Run report

7. Run the report

THE SEVEN STEPS – SIMPLE EXAMPLE

Get the Output

1. Chose the report & save output
2. Change output to XML format
3. Save the XML output

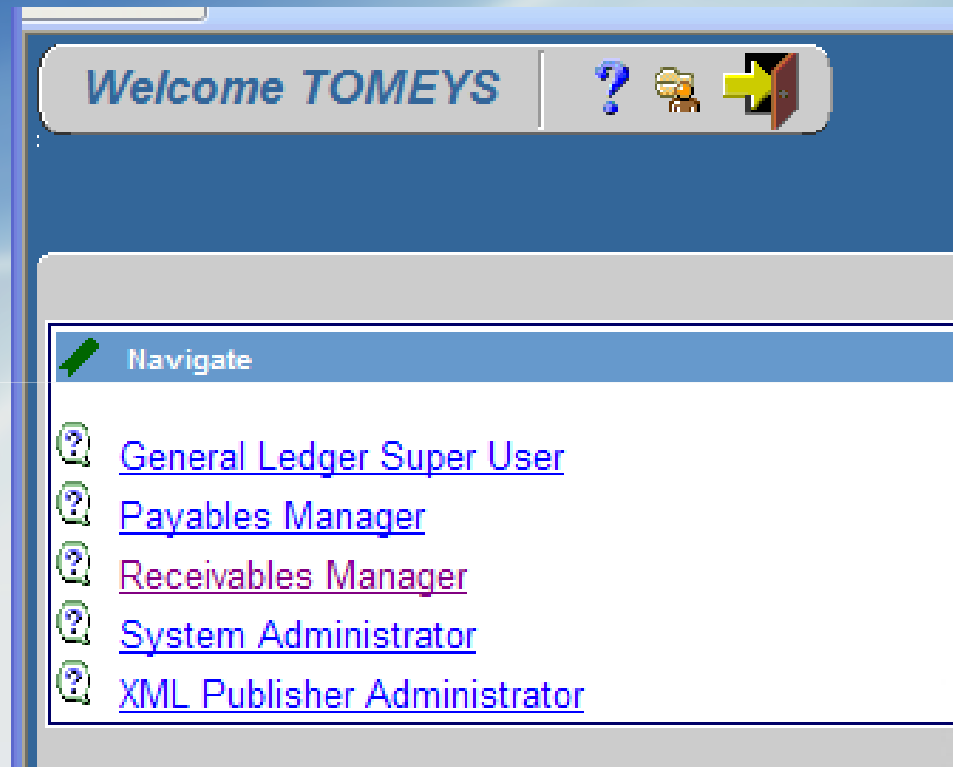
Make the template

4. Create an *.RTF template
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CHOOSE a REPORT



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CHOSE a REPORT

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THE SEVEN STEPS – SIMPLE EXAMPLE

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|-------------------|-----------------------------------|
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Oracle Applications - The 11i Laptop - Demonstrator on loan from Belife.co.uk

File Edit View Folder Tools Window Help

Submit Request

Run this Request...

Name **Customer Open Balance Letter**

Parameters **01-JAN-2008:::.....**

Language **American English**

Copy...

Language Settings... Debug Options

At these Times...

Run the Job **As Soon As Possible**

Upon Completion...

☒ Save all Output Files

Layout

Notify

Print to **noprint**

Help (C)

Parameters

As of date **01-JAN-2008**

Customer Name From

Customer Name To **All Star Sports**

Currency

Minimum Invoice Balance

Minimum Open Balance

Include On Account Credits

Include On Account Receipts

Include Unapplied Receipts

Include Uncleared Receipts

Reference Number

OK Cancel Clear Help



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SAVE the OUTPUT

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Vision Operations (USA)

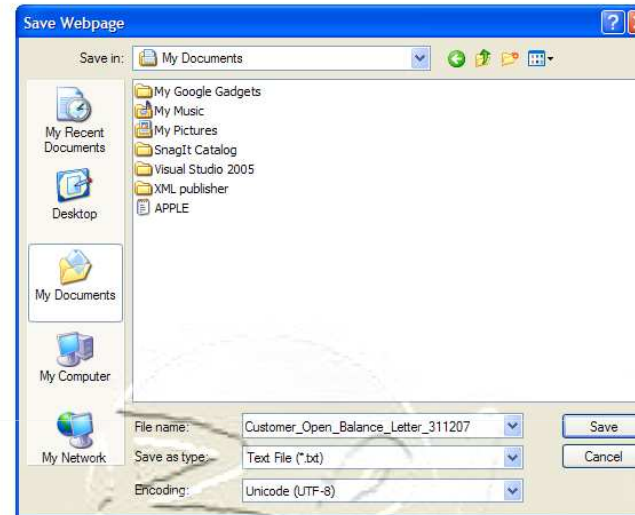
A. C. Networks
3405 East Bay Blvd.
Provo
UT
84606
US

Dear Sirs/Madam,

According to our records as of 01 January 2008 , we show the following open balances.

Your USD balance is 2,575,752.50 , made up as follows :

| Invoice Number | Invoice Date | Invoice Type | Invoice Amount | Open Balance Amount |
|----------------|--------------|--------------|----------------|---------------------|
| 10019743 | 11-NOV-2003 | Standard | 144,444.48 | 144,444.48 |
| 10019800 | 13-NOV-2003 | Standard | 141,203.15 | 141,203.15 |
| 10019883 | 18-NOV-2003 | Standard | 125,946.85 | 125,946.85 |
| 10020212 | 20-NOV-2003 | Standard | 141,203.15 | 141,203.15 |
| 502398 | 22-NOV-2003 | Standard | 20,026.25 | 20,026.25 |
| 502399 | 22-NOV-2003 | Standard | 46,006.25 | 46,006.25 |
| 10020272 | 24-NOV-2003 | Standard | 105,814.38 | 105,814.38 |
| 10020297 | 25-NOV-2003 | Standard | 125,946.85 | 125,946.85 |



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NOTE the CODE

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Requests

Refresh Data Find Requests Submit a New Request...

| Request ID | Name | Parent | Phase | Status | Parameters |
|------------|-----------------------|---------|-----------|--------|----------------------------------|
| 2760548 | Customer Open Balance | 2760547 | Completed | Normal | 2008/01/01 00:00:00, , All Sta |
| 2760547 | Customer Open Balance | | Completed | Normal | 222, 39582, Y |
| 2760525 | Customer Open Balance | 2760520 | Completed | Normal | 2008/01/01 00:00:00, , , , , , , |
| 2760520 | Customer Open Balance | | Completed | Normal | 222, 39582, Y |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

Hold Request View Details... View Output
Cancel Request Diagnostics View Log...

http://localhost.appsdba.co.uk:8000/OA_CGI/FNDWRR.exe?temp_id=1265245130 - Windows Internet Explorer

http://localhost.appsdba.co.uk:8000/OA_CGI/FNDWRR.exe?temp_id=126524

Google

Go

Bookmarks

Popups okay

Check

http://localhost.appsdba.co.uk:8000/OA_CGI/FNDW...

Receivables: Version : 11.5.0 - Development

Copyright (c) 1979, 1999, Oracle Corporation. All rights reserved.

ARXCOBLX module: Customer Open Balance Letter

Current system time is 31-DEC-2007 12:37:35

| Starting concurrent program execution...



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CHANGE OUTPUT to XML format

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File Edit View Folder Tools Window Help

Navigator - System Administrator

Concurrent Programs

Functions Documents

Concurrent:Program:Define

Define concurrent program

Top Ten List

Program: Customer Open Balance Letter [Enabled]

Short Name: ARXCOBLX

Application: Receivables

Description: Customer Open Balance Letter

Executable

Name: ARXCOBLX

Method: Oracle Reports

Options: HTML, PCL, PDF, PostScript, Text, XML

Priority:

Request

Type:

Incrementor:

MLS Function: ARP_ARXCOBL_MLS_FUNCTION

☒ Use in SRS ☐ Allow Disabled Values

☐ Run Alone ☒ Restart on System Failure

☐ Enable Trace ☒ NLS Compliant

Output

Format: XML

☒ Print

Columns: 80

Rows: 45

Style: Portrait

☐ Style Required

Printer:

Copy to... Session Control Incompatibilities Parameters



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Re-Run and SAVE OUTPUT

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File Edit View Folder Tools Window Help

Submit Request

Run this Request...

Name

Parameters

Language

Copy...

Language Settings... Debug Options

At these Times...

Run the Job Schedule...

Upon Completion...

☒ Save all Output Files

Layout

Notify

Print to

Re-run the request to capture the sample XML output

Help (?) Submit

Prior Requests

Find %

| Description | Parameters |
|------------------------------|------------------------------|
| Customer Open Balance Letter | 2008/01/01 00:00:00, All St |
| Customer Open Balance Letter | 2008/01/01 00:00:00, |
| AR Reconciliation Report | 1,, 2007/04/01 00:00:00, 200 |
| Dunning Letter Generate | CUSTOMER, 2007/12/18 00: |

Find OK Cancel

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| Run report | 7. Run the report |

The output is now XML

Save this for reference.

tip - use the request code in the name (e.g. Save ARXCOBLX)

```
Snagit
http://localhost:appsdba.co.uk:8000/OA_CGI/FNDW...

<?xml version="1.0" ?>
<!-- Generated by Oracle Reports version 6.0.8.25.0 -->
- <ARXCOBLX>
- <LIST_G_CUSTOMER>
- <G_CUSTOMER>
  <CUSTOMER_NAME>A. C. Networks</CUSTOMER_NAME>
  <ZIP>84606</ZIP>
  <ADDRESS_LINE4 />
  <ADDRESS_LINE3 />
  <AS_OF_DATE>01-JAN-08</AS_OF_DATE>
  <TAX_REFERENCE_NUM />
  <STATE>UT</STATE>
  <ADDRESS_LINE2 />
  <ADDRESS_LINE1>3405 East Bay Blvd.</ADDRESS_LINE1>
  <COUNTRY>US</COUNTRY>
  <CITY>Provo</CITY>
  <CUSTOMER_NUMBER>1143</CUSTOMER_NUMBER>
  <ORGANIZATION_NAME>Vision Operations (USA)</ORGANIZATION_NAME>
- <LIST_G_CURRENCY>
- <G_CURRENCY>
  <TRX_CURRENCY_CODE>USD</TRX_CURRENCY_CODE>
- <LIST_G_INVOICES>
- <G_INVOICES>
  <TRX_NUMBER>10019743</TRX_NUMBER>
  <TRANS_TYPE>Standard</TRANS_TYPE>
  <TRANSACTION_DATE>11-NOV-03</TRANSACTION_DATE>
  <TRANS_AMOUNT>144444.48</TRANS_AMOUNT>
  <TRANS_AMOUNT_REMAINING>144444.48</TRANS_AMOUNT_REMAINING>
  <RECEIPT_AMOUNT>0</RECEIPT_AMOUNT>
  <ADJUSTMENT_AMOUNT>0</ADJUSTMENT_AMOUNT>
  <EARNED_DISCOUNT_AMOUNT>0</EARNED_DISCOUNT_AMOUNT>
  <UNEARNED_DISCOUNT_AMOUNT>0</UNEARNED_DISCOUNT_AMOUNT>
  <INVOICE_CREDIT_AMOUNT>0</INVOICE_CREDIT_AMOUNT>
  <BANK_CHARGE>0</BANK_CHARGE>
  <ON_ACCOUNT_CREDIT_AMOUNT>0</ON_ACCOUNT_CREDIT_AMOUNT>
  <ON_ACCOUNT_RECEIPTS>0</ON_ACCOUNT_RECEIPTS>
  <UNAPPLIED_RECEIPTS>0</UNAPPLIED_RECEIPTS>
  <CF_TRANS_AMOUNT>144,444.48</CF_TRANS_AMOUNT>
  <CF_TRANS_AMOUNT_REMAINING>144,444.48</CF_TRANS_AMOUNT_REMAINING>
  <G_INVOICES>
- <G_INVOICES>
  <TRX_NUMBER>10019800</TRX_NUMBER>
  <TRANS_TYPE>Standard</TRANS_TYPE>
  <TRANSACTION_DATE>13-NOV-03</TRANSACTION_DATE>
  <TRANS_AMOUNT>141203.15</TRANS_AMOUNT>
  <TRANS_AMOUNT_REMAINING>141203.15</TRANS_AMOUNT_REMAINING>
  <RECEIPT_AMOUNT>0</RECEIPT_AMOUNT>
  <ADJUSTMENT_AMOUNT>0</ADJUSTMENT_AMOUNT>
```



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Run report

7. Run the report

CREATE an RTF TEMPLATE

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CUSTOMER NAME
ADDRESS LINE1
ADDRESS LINE2
ADDRESS LINE3
CITY
POSCODE

Dear Sirs/Madam,

According to our records as of AS OF DATE we show the following open balances.
Your USD balance invoice OPEN BALANCE is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager



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CREATE an RTF TEMPLATE

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| | 6. Create a "template" |
| Run report | 7. Run the report |

you may find it useful to keep the XML file and the text file open for reference

Dear Sirs/Madam,
According to our records as of 1 Jan 08, we show the following open balances.
Your USD balance is \$1,000.00 made up as follows:

Please confirm the above information.
Thanking you in advance, we remain.
Yours faithfully,

Receivables Manager

```

<?xml version="1.0" ?>
<!-- Generated by Oracle Reports version 6.0.8.25.0 -->
<ARXCOBLX>
  <LIST_G_CUSTOMER>
    <- G_CUSTOMER>
      <CUSTOMER_NAME>A. C. Networks</CUSTOMER_NAME>
      <ZIP>84606</ZIP>
      <ADDRESS_LINE4 />
      <ADDRESS_LINE3 />
      <AS_OF_DATE>01-JAN-08</AS_OF_DATE>
      <TAX_REFERENCE_NUM />
      <STATE>UT</STATE>
      <ADDRESS_LINE2 />
      <ADDRESS_LINE1>3405 East Bay Blvd.</ADDRESS_LINE1>
      <COUNTRY>US</COUNTRY>
      <CITY>Provo</CITY>
      <CUSTOMER_NUMBER>1143</CUSTOMER_NUMBER>
      <ORGANIZATION_NAME>Vision Operations (USA)</ORGANIZATION_NAME>
    </G_CUSTOMER>
    <- LIST_G_CURRENCY>
      <G_CURRENCY>
        <TRX_CURRENCY_CODE>USD</TRX_CURRENCY_CODE>
      </G_CURRENCY>
    <- LIST_G_INVOICES>
      <- G_INVOICES>
        <TRX_NUMBER>10019743</TRX_NUMBER>
        <TRANS_TYPE>Standard</TRANS_TYPE>
        <TRANSACTION_DATE>11-NOV-03</TRANSACTION_DATE>
        <TRANS_AMOUNT>144444.48</TRANS_AMOUNT>
        <TRANS_AMOUNT_REMAINING>144444.48</TRANS_AMOUNT_REMAINING>
        <RECEIPT_AMOUNT>0</RECEIPT_AMOUNT>
        <ADJUSTMENT_AMOUNT>0</ADJUSTMENT_AMOUNT>
        <EARNED_DISCOUNT_AMOUNT>0</EARNED_DISCOUNT_AMOUNT>
        <UNEARNED_DISCOUNT_AMOUNT>0</UNEARNED_DISCOUNT_AMOUNT>
        <INVOICE_CREDIT_AMOUNT>0</INVOICE_CREDIT_AMOUNT>
        <BANK_CHARGE>0</BANK_CHARGE>
        <ON_ACCOUNT_CREDIT_AMOUNT>0</ON_ACCOUNT_CREDIT_AMOUNT>
        <ON_ACCOUNT_RECEIPTS>0</ON_ACCOUNT_RECEIPTS>
        <UNAPPLIED_RECEIPTS>0</UNAPPLIED_RECEIPTS>
        <CF_TRANS_AMOUNT>144,444.48</CF_TRANS_AMOUNT>
        <CF_TRANS_AMOUNT_REMAINING>144,444.48</CF_TRANS_AMOUNT_REMAINING>
      </G_INVOICES>
      <- G_INVOICES>
        <TRX_NUMBER>10019800</TRX_NUMBER>
        <TRANS_TYPE>Standard</TRANS_TYPE>
        <TRANSACTION_DATE>13-NOV-03</TRANSACTION_DATE>
        <TRANS_AMOUNT>141203.15</TRANS_AMOUNT>
        <TRANS_AMOUNT_REMAINING>141203.15</TRANS_AMOUNT_REMAINING>
      </G_INVOICES>
    </LIST_G_INVOICES>
  </ARXCOBLX>

```

vision c

A. C. Ne
3405 Eas
PROVO
UT
84606
US

Great Output Using XML Publisher - BeLife.co.uk: January 2008

Dear Sirs/Madam,
According to our records as of 01 January 2008 , we show the following open balances.

Your USD balance is 2,575,752.50 , made up as follows:

| Invoice Number | Invoice Date | Invoice Type | Invoice Amount |
|----------------|--------------|--------------|----------------|
| 10019743 | 11-NOV-2003 | Standard | 144,444.48 |
| 10019800 | 13-NOV-2003 | Standard | 141,203.15 |
| 10019883 | 18-NOV-2003 | Standard | 125,946.85 |
| 10020212 | 20-NOV-2003 | Standard | 141,203.15 |
| 502398 | 22-NOV-2003 | Standard | 20,026.25 |
| 502399 | 22-NOV-2003 | Standard | 46,006.25 |
| 10020272 | 24-NOV-2003 | Standard | 105,814.38 |
| 10020297 | 25-NOV-2003 | Standard | 125,946.85 |
| 10020453 | 04-DEC-2003 | Standard | 172,811.09 |
| 10020454 | 04-DEC-2003 | Standard | 163,116.52 |

CREATE an RTF TEMPLATE



Dear Sirs/Madam,

According to our records as of AS_OF_DATE, we show the following open balances.
Your USD balance is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

```
<?xml version="1.0" ?>
<!-- Generated by Oracle Reports version 6.0.8.25.0 -->
- <ARXCOBLX>
- <LIST_G_CUSTOMER>
- <G_CUSTOMER>
  <CUSTOMER_NAME>A. C. Networks</CUSTOMER_NAME>
  <ZIP>84606</ZIP>
  <ADDRESS_LINE4 />
  <ADDRESS_LINE3 />
  <AS_OF_DATE>01-JAN-08</AS_OF_DATE>
  <TAX_REFERENCE_NUM />
  <STATE>UT</STATE>
  <ADDRESS_LINE2 />
  <ADDRESS_LINE1>2405 East Bay Blvd</ADDRESS_LINE1>
  <COUNTRY>US</COUNTRY>
  <CITY>Provo</CITY>
  <CUSTOMER_NUM />
  <ORGANIZATION_NAME />
- <LIST_G_CURRENCY>
- <G_CURRENCY>
  <TRX_CURRENCY />
- <LIST_G_INVOICE>
- <G_INVOICE>
  <TRX_NUMBER />
  <TRANSACTION_DATE>11-NOV-03</TRANSACTION_DATE>
  <TRANS_AMOUNT>144444.48</TRANS_AMOUNT>
  <TRANS_AMOUNT_REMAINING>144444.48</TRANS_AMOUNT_REMAINING>
  <RECEIPT_AMOUNT>0</RECEIPT_AMOUNT>
  <ADJUSTMENT_AMOUNT>0</ADJUSTMENT_AMOUNT>
  <EARNED_DISCOUNT_AMOUNT>0</EARNED_DISCOUNT_AMOUNT>
  <UNEARNED_DISCOUNT_AMOUNT>0</UNEARNED_DISCOUNT_AMOUNT>
  <INVOICE_CREDIT_AMOUNT>0</INVOICE_CREDIT_AMOUNT>
  <BANK_CHARGE>0</BANK_CHARGE>
  <ON_ACCOUNT_CREDIT_AMOUNT>0</ON_ACCOUNT_CREDIT_AMOUNT>
  <ON_ACCOUNT_RECEIPTS>0</ON_ACCOUNT_RECEIPTS>
  <UNAPPLIED_RECEIPTS>0</UNAPPLIED_RECEIPTS>
  <CF_TRANS_AMOUNT>144,444.48</CF_TRANS_AMOUNT>
  <CF_TRANS_AMOUNT_REMAIN>144,444.48</CF_TRANS_AMOUNT_REMAIN>
</G_INVOICES>
- <G_INVOICES>
  <TRX_NUMBER>10019800</TRX_NUMBER>
```

Introduction - Outline of Presentation

Introduction

How to do it
The 7 Steps – simple example
Improving the example
Using BI publisher add-in

THE SEVEN STEPS – SIMPLE EXAMPLE

- | | |
|-------------------|-----------------------------------|
| Get the Output | 1. Chose the report & save output |
| Make the template | 2. Change output to XML format |
| | 3. Save the XML output |
| | 4. Create an *.RTF template |
| Run report | 5. Create a "data definition" |
| | 6. Create a "template" |
| | 7. Run the report |

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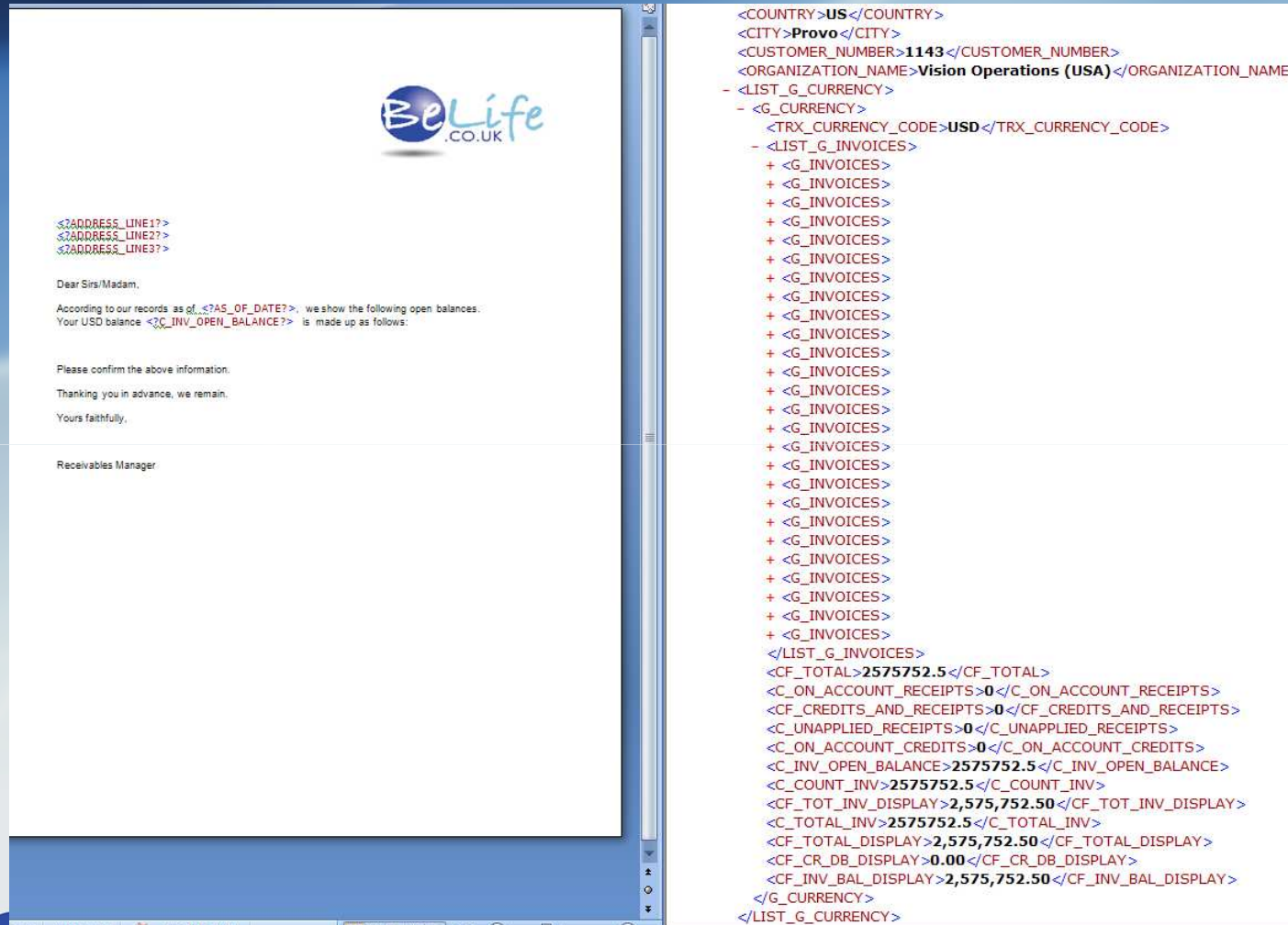


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| | |
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| Get the Output | 1. Chose the report & save output |
| | 2. Change output to XML format |
| | 3. Save the XML output |
| Make the template | 4. Create an *.RTF template |
| | 5. Create a "data definition" |
| | 6. Create a "template" |
| Run report | 7. Run the report |



SAVE the RTF TEMPLATE

The screenshot displays the BeLife XML Publisher application. A 'Save As' dialog box is open, showing the file 'Customer Open Balance Letter stage1.txt' being saved in 'Rich Text Format'. The background window shows a letter template with various XML tags for data insertion, such as `<?ADDRESS_LINE1?>`, `<COUNTRY>US</COUNTRY>`, and `<CITY>Provo</CITY>`. The BeLife.co.uk logo is visible in the top left of the application window.

| | |
|--|------------------------------|
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THE SEVEN STEPS – SIMPLE EXAMPLE

| | |
|-------------------|-----------------------------------|
| Get the Output | 1. Chose the report & save output |
| | 2. Change output to XML format |
| | 3. Save the XML output |
| Make the template | 4. Create an *.RTF template |
| | 5. Create a "data definition" |
| | 6. Create a "template" |
| Run report | 7. Run the report |

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THE SEVEN STEPS – SIMPLE EXAMPLE

**Get the
Output**

1. Chose the report & save output
2. Change output to XML format
3. Save the XML output

**Make the
template**

4. Create an *.RTF template
5. Create a “data definition”
6. Create a “template”

Run report

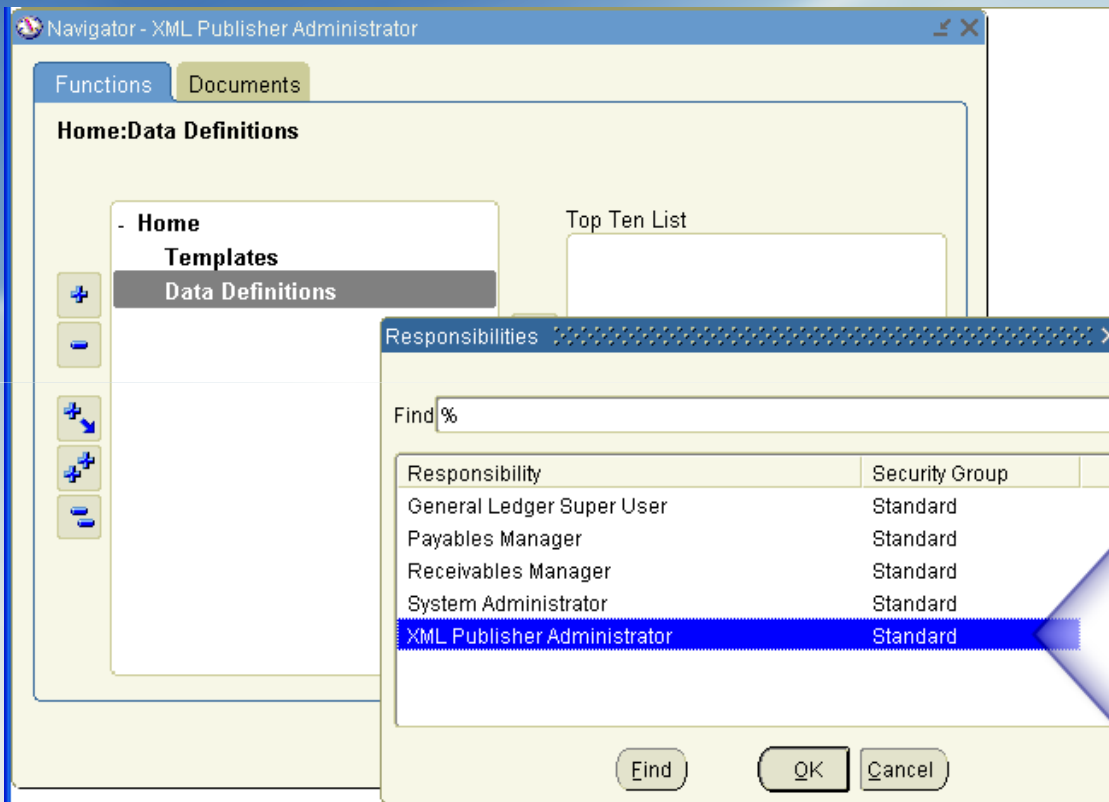
7. Run the report

CREATE a “DATA DEFINITION”

| |
|--|
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THE SEVEN STEPS – SIMPLE EXAMPLE

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|-------------------|-----------------------------------|
| Get the Output | 1. Chose the report & save output |
| | 2. Change output to XML format |
| | 3. Save the XML output |
| Make the template | 4. Create an *.RTF template |
| | 5. Create a “data definition” |
| | 6. Create a “template” |
| Run report | 7. Run the report |



Log on to
XML Publisher Administrator

CREATE a “DATA DEFINITION”

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THE SEVEN STEPS – SIMPLE EXAMPLE

| | |
|-------------------|-----------------------------------|
| Get the Output | 1. Chose the report & save output |
| | 2. Change output to XML format |
| | 3. Save the XML output |
| Make the template | 4. Create an *.RTF template |
| | 5. Create a “data definition” |
| | 6. Create a “template” |
| Run report | 7. Run the report |


ORACLE XML Publisher

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Data Definitions

Search

Name
Application 

Code
Active

Create a Data Definition

| Name | Application | Start Date | End Date | Update |
|----------------------|-------------|------------|----------|--------|
| No search conducted. | | | | |

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CREATE a "DATA DEFINITION"

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THE SEVEN STEPS - SIMPLE EXAMPLE

- | | |
|-------------------|-----------------------------------|
| Get the Output | 1. Chose the report & save output |
| | 2. Change output to XML format |
| | 3. Save the XML output |
| Make the template | 4. Create an *.RTF template |
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ORACLE XML Publisher

Data Definitions >

Create Data Definition

Start Date and End Date define when the Data Definition is active. Only active Data Definitions can be used to create new Templates. The Name can be translated while the Code is identical for all languages.

| | | | |
|---------------|-------------------------|--------------|-------------|
| * Name | Customer Open Balance L | * Code | ARXCOBLX |
| * Application | Receivables | * Start Date | 31-Dec-2007 |
| XML Schema | Browse... | End Date | |
| Preview Data | Browse... | | |
| Description | | | |

Fill out only the boxes with an asterisk

The "code" is the concurrent request code you noted previously. * this keeps appearing!

and select the XML file saved earlier to populate the "preview" data

CREATE a “DATA DEFINITION”

| | |
|--|------------------------------|
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THE SEVEN STEPS – SIMPLE EXAMPLE

- | | |
|-------------------|-----------------------------------|
| Get the Output | 1. Chose the report & save output |
| | 2. Change output to XML format |
| | 3. Save the XML output |
| Make the template | 4. Create an *.RTF template |
| | 5. Create a “data definition” |
| | 6. Create a “template” |
| Run report | 7. Run the report |

Data Definitions >

Confirmation

Data Definition Customer Open Balance Letter has been successfully created.

View Data Definition: Customer Open Balance Letter

Name Customer Open Balance Letter
Application Receivables
XML Schema
Preview Data [ARXCOBLX XML output.xml](#)

Code ARXCOBLX
Start Date 31-Dec-2007
End Date

Description



TRANSFORMING YOUR REPORTS WITH XML PUBLISHER

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THE SEVEN STEPS – SIMPLE EXAMPLE

Get the Output

1. Chose the report & save output
2. Change output to XML format
3. Save the XML output

Make the template

4. Create an *.RTF template
5. Create a “data definition”
6. Create a “template”

Run report

7. Run the report

CREATE a "TEMPLATE"

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| Get the Output | 1. Chose the report & save output |
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| Make the template | 4. Create an *.RTF template |
| | 5. Create a "data definition" |
| | 6. Create a "template" |
| Run report | 7. Run the report |
| Great Output Using XML Publisher : BeLife.co.uk : January 2008 | |

ORACLE XML Publisher

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Templates

Search

Name
Application
Type

Code
Data Definition
Active

| Name | Application | Data Definition | Type | Start Date | End Date | Duplicate |
|------------------------------|-------------|------------------------------|------|-------------|----------|-----------|
| Customer Open Balance Letter | Receivables | Customer Open Balance Letter | RTF | 31-Dec-2007 | | |

Customer Open Balance Letter

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CREATE a "TEMPLATE"

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THE SEVEN STEPS - SIMPLE EXAMPLE

- | | |
|-------------------|------------------------------------|
| Get the Output | 1. Choose the report & save output |
| Make the template | 2. Change output to XML format |
| | 3. Save the XML output |
| | 4. Create an *.RTF template |
| | 5. Create a "data definition" |
| | 6. Create a "template" |
| Run report | 7. Run the report |

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Populate the fields marked with asterisk

Populate the fields marked with asterisk

Populate the fields marked with asterisk

Same report "code" as in data definition, as in original report

Data definition just created. A sensible name is easier to remember, Oracle will autocomplete on partial population

Cancel Apply

* Name Customer Open Balance L

* Application Receivables

* Type RTF

* Code ARXCOBLX

* Data Definition Customer Open Balance L

* Start Date 31-Dec-2007

End Date

Subtemplate

Description

* File Browse...

* Language English

* Territory United Kingdom

Choose file

Look in: UKOUG XML Presentation

70 XML Publisher

ARXCOBLX Customer Open Balance Letter Stage1

ARXCOBLX XML output

Customer Open Balance Letter complete

Customer Open Balance Letter stage1

Customer Open Balance Letter stage1a

Customer Open Balance Letter_311207

XML Publisher

XML Publisher 1.1



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PREVIEW the “TEMPLATE”

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| Get the Output | 1. Chose the report & save output |
| | 2. Change output to XML format |
| | 3. Save the XML output |
| Make the template | 4. Create an *.RTF template |
| | 5. Create a “data definition” |
| | 6. Create a “template” |
| Run report | 7. Run the report |

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3405 East Bay Blvd.

Dear Sirs/Madam,

According to our records as of 01-JAN-08, we show the following open balances.
Your USD balance 2575752.5 is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

View Template: Customer Open Balance Letter

ORACLE XML Publisher

Close Window Preferences Help

Templates Data Definitions

Templates >

Confirmation

Template Customer Open Balance Letter has been successfully updated.

View Template: Customer Open Balance Letter

General





| | | | |
|------------------------|--|-----------------|------------------------------|
| Name | Customer Open Balance Letter | Code | ARXCOBLX |
| Application | Receivables | Data Definition | Customer Open Balance Letter |
| Type | RTF | Start Date | 31-Dec-2007 |
| Default File | Customer Open Balance Letter stage1txt.rtf | End Date | |
| Default File Language | English | Subtemplate | No |
| Default File Territory | United Kingdom | | |

Description

Template Files

Add language-specific template files to support additional languages.

Preview Format PDF

| File Name | Language | Territory | Preview | Download | Update | Delete |
|--|----------|----------------|---|---|---|---|
| Customer Open Balance Letter stage1txt.rtf | English | United Kingdom |  |  |  |  |

Return to Templates

Templates | Data Definitions | Close Window | Preferences | Help

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TRANSFORMING YOUR REPORTS WITH XML PUBLISHER

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THE SEVEN STEPS – SIMPLE EXAMPLE

Get the Output

1. Chose the report & save output
2. Change output to XML format
3. Save the XML output

Make the template

4. Create an *.RTF template
5. Create a “data definition”
6. Create a “template”

Run report

7. Run the report

RUN the REPORT

Submit Request

Run this Request...

Name: **Customer Open Balance Letter** Copy...

Parameters: **01-JAN-2008::All Star Sports:::**

Language: **American English** Language Settings... Debug Options

At these Times...

Run the Job: **As Soon As Possible** Schedule...

Upon Completion...

☒ Save all Output Files

Layout:

Notify:

Print to: **noprint** Options...

Help (C) Submit Cancel

| | |
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| Get the Output | 1. Chose the report & save output |
| | 2. Change output to XML format |
| | 3. Save the XML output |
| Make the template | 4. Create an *.RTF template |
| | 5. Create a "data definition" |
| | 6. Create a "template" |
| Run report | 7. Run the report |

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RUN the REPORT



3405 East Bay Blvd.

Dear Sirs/Madam,

According to our records as of 01-JAN-08, we show the following open balances.
Your USD balance 2575752.5 is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

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| | 2. Change output to XML format |
| | 3. Save the XML output |
| Make the template | 4. Create an *.RTF template |
| | 5. Create a "data definition" |
| | 6. Create a "template" |
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PRESENTATION OUTLINE

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| | Output format tips |

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CHANGE the FONT/ADD MORE

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The screenshot displays a BeLife XML Publisher report. On the left, a font change dialog is open, showing the font set to 'Verdana' and size '10'. The 'Color' dropdown is set to 'Automatic'. The report content includes a header with the BeLife logo, a salutation 'Dear Sirs/Ma', and a body section titled 'According to c'. Below this, there is a table of open balances. The XML data on the right shows the structure of the report, including customer information and account details.

XML Data:

```
<?CUSTOMER_NAME?>
<?ADDRESS_LINE1?>
<?ADDRESS_LINE2?>
<?ADDRESS_LINE3?>
<?ZIP?>
<?COUNTRY?>
Dear Sirs/Ma
According to c
YourUSD bal
Please confir
Thanking you
Yours faithful
Receivables Manager
```

XML Data:

```
<ARXCOBLX>
<LIST_G_CUSTOMER>
  <G_CUSTOMER>
    <CUSTOMER_NAME>A. C. Networks</CUSTO
    <ZIP>84606</ZIP>
    <ADDRESS_LINE4 />
    <ADDRESS_LINE3 />
    <AS_OF_DATE>01-JAN-08</AS_OF_DATE>
    <TAX_REFERENCE_NUM />
    <STATE>UT</STATE>
    <ADDRESS_LINE2 />
    <ADDRESS_LINE1>3405 East Bay Blvd.</AD
    <COUNTRY>US</COUNTRY>
    <CITY>Provo</CITY>
    <CUSTOMER_NUMBER>1143</CUSTOMER_NU
    <ORGANIZATION_NAME>Vision Operations (
  + <LIST_G_CURRENCY>
    <C_AS_OF_DATE_DISPLAY>01 January 2008
  </G_CUSTOMER>
  <G_CUSTOMER>
    <CUSTOMER_NAME>ABC Corporation Ameri
    <ZIP>94111</ZIP>
    <ADDRESS_LINE4 />
    <ADDRESS_LINE3 />
    <AS_OF_DATE>01-JAN-08</AS_OF_DATE>
    <TAX_REFERENCE_NUM />
    <STATE>CA</STATE>
    <ADDRESS_LINE2 />
    <ADDRESS_LINE1>300 ABC Parkway</ADDRI
    <COUNTRY>US</COUNTRY>
    <CITY>San Francisco</CITY>
    <CUSTOMER_NUMBER>2637</CUSTOMER_NU
    <ORGANIZATION_NAME>Vision Operations (
  + <LIST_G_CURRENCY>
```



TRANSFORMING YOUR REPORTS WITH XML PUBLISHER

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CHANGE the FONT/ADD MORE

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<?CUSTOMER_NAME?>
<?ADDRESS_LINE1?>
<?ADDRESS_LINE2?>
<?ADDRESS_LINE3?>
<?ADDRESS_LINE4?>
<?CITY?>
<?STATE?>
<?ZIP?>
<?COUNTRY?>

Dear Sirs/Madam,

According to our records as of <AS_OF_DATE>, we show the following open balances.
Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager



TRANSFORMING YOUR REPORTS WITH XML PUBLISHER

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LETTER “for-each” CUSTOMER

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| | Questions/Knowledge sharing |

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Simple "For ... End" loop

* this instructs XML to show the details on the template (between the "For" and "End")
* for each "G_CUSTOMER"

<?for-each G_CUSTOMER?>

<?CUSTOMER_NAME?>
<?ADDRESS_LINE1?>
<?ADDRESS_LINE2?>
<?ADDRESS_LINE3?>
<?ADDRESS_LINE4?>
<?CITY?>
<?STATE?>
<?ZIP?>
<?COUNTRY?>

Dear Sirs/Madam,

According to our records as of <AS_OF_DATE>, we show the following open balances.
Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

<?end-for-each?>

End of loop

LETTER "for-each" CUSTOMER

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| | Output format tricks |
| | Questions/Knowledge sharing |

<?for-each G_CUSTOMER?>

<CUSTOMER_NAME?>
<?ADDRESS_LINE1?>
<?ADDRESS_LINE2?>
<?ADDRESS_LINE3?>
<?ADDRESS_LINE4?>
<?CITY?>
<?STATE?>
<?ZIP?>
<?COUNTRY?>

Dear Sirs/Madam,

According to our records as of <AS_OF_DATE>, we show the following open balances.
Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

<?end-for-each?>

Simple "For ... End" loop

* this instructs XML to show the details on the template
(between the "For" and "End")
* for each "G_CUSTOMER"

End of loop

```
<!-- Generated by Oracle Reports version 6 -->
- <ARXCOBLX>
- <LIST_G_CUSTOMER>
- <G_CUSTOMER>
  <CUSTOMER_NAME>A. C. Networks</CUSTOMER_NAME>
  <ZIP>84606</ZIP>
  <ADDRESS_LINE4 />
  <ADDRESS_LINE3 />
  <AS_OF_DATE>01-JAN-08</AS_OF_DATE>
  <TAX_REFERENCE_NUM />
  <STATE>UT</STATE>
  <ADDRESS_LINE2 />
  <ADDRESS_LINE1>3405 East Bay Blvd.</ADDRESS_LINE1>
  <COUNTRY>US</COUNTRY>
  <CITY>Provo</CITY>
  <CUSTOMER_NUMBER>1143</CUSTOMER_NUMBER>
  <ORGANIZATION_NAME>Vision Operations (USA)</ORGANIZATION_NAME>
  + <LIST_G_CURRENCY>
  <C_AS_OF_DATE_DISPLAY>01 January 2008</C_AS_OF_DATE_DISPLAY>
</G_CUSTOMER>
- <G_CUSTOMER>
  <CUSTOMER_NAME>ABC Corporation Americas</CUSTOMER_NAME>
  <ZIP>94111</ZIP>
  <ADDRESS_LINE4 />
  <ADDRESS_LINE3 />
  <AS_OF_DATE>01-JAN-08</AS_OF_DATE>
  <TAX_REFERENCE_NUM />
  <STATE>CA</STATE>
  <ADDRESS_LINE2 />
  <ADDRESS_LINE1>300 ABC Parkway</ADDRESS_LINE1>
  <COUNTRY>US</COUNTRY>
  <CITY>San Francisco</CITY>
  <CUSTOMER_NUMBER>2637</CUSTOMER_NUMBER>
  <ORGANIZATION_NAME>Vision Operations (USA)</ORGANIZATION_NAME>
  + <LIST_G_CURRENCY>
  <C_AS_OF_DATE_DISPLAY>01 January 2008</C_AS_OF_DATE_DISPLAY>
</G_CUSTOMER>
- <G_CUSTOMER>
  <CUSTOMER_NAME>All Star Sports</CUSTOMER_NAME>
  <ZIP>60601</ZIP>
  <ADDRESS_LINE4 />
  <ADDRESS_LINE3 />
  <AS_OF_DATE>01-JAN-08</AS_OF_DATE>
  <TAX_REFERENCE_NUM />
  <STATE>IL</STATE>
  <ADDRESS_LINE2 />
  <ADDRESS_LINE1>123 Oak Street</ADDRESS_LINE1>
  <COUNTRY>US</COUNTRY>
  <CITY>CHICAGO</CITY>
```

LETTER "for-each" CUSTOMER

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<?for-each G_CUSTOMER?>

<?CUSTOMER_NAME?>
<?ADDRESS_LINE1?>
<?ADDRESS_LINE2?>
<?ADDRESS_LINE3?>
<?ADDRESS_LINE4?>
<?CITY?>
<?STATE?>
<?ZIP?>
<?COUNTRY?>

Dear Sirs/Madam,

According to our records as of <AS_OF_DATE>, we show the following open balances.
Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

<?end-for-each?>

Simple "For ... End" loop

* this instructs XML to show the details on the template (between the "For" and "End")
* for each "G_CUSTOMER"

LOOP

LOOP

LOOP

<!-- Generated by Oracle Reports version 6

- <ARXCOBLX>

- <LIST_G_CUSTOMER>

- <G_CUSTOMER>

<CUSTOMER_NAME>A. C. Networks</CUSTOMER_NAME>

<ZIP>84606</ZIP>

<ADDRESS_LINE4 />

<ADDRESS_LINE3 />

<AS_OF_DATE>01-JAN-08</AS_OF_DATE>

<TAX_REFERENCE_NUM />

<STATE>UT</STATE>

<ADDRESS_LINE2 />

<ADDRESS_LINE1>3405 East Bay Blvd.</ADDRESS_LINE1>

<COUNTRY>US</COUNTRY>

<CITY>Provo</CITY>

<CUSTOMER_NUMBER>1143</CUSTOMER_NUMBER>

<ORGANIZATION_NAME>Vision Operations (USA)</ORGANIZATION_NAME>

+ <LIST_G_CURRENCY>

<C_AS_OF_DATE_DISPLAY>01 January 2008</C_AS_OF_DATE_DISPLAY>

</G_CUSTOMER>

- <G_CUSTOMER>

<CUSTOMER_NAME>ABC Corporation Americas</CUSTOMER_NAME>

<ZIP>94111</ZIP>

<ADDRESS_LINE4 />

<ADDRESS_LINE3 />

<AS_OF_DATE>01-JAN-08</AS_OF_DATE>

<TAX_REFERENCE_NUM />

<STATE>CA</STATE>

<ADDRESS_LINE2 />

<ADDRESS_LINE1>300 ABC Parkway</ADDRESS_LINE1>

<COUNTRY>US</COUNTRY>

<CITY>San Francisco</CITY>

<CUSTOMER_NUMBER>2637</CUSTOMER_NUMBER>

<ORGANIZATION_NAME>Vision Operations (USA)</ORGANIZATION_NAME>

+ <LIST_G_CURRENCY>

<C_AS_OF_DATE_DISPLAY>01 January 2008</C_AS_OF_DATE_DISPLAY>

</G_CUSTOMER>

- <G_CUSTOMER>

<CUSTOMER_NAME>All Star Sports</CUSTOMER_NAME>

<ZIP>60601</ZIP>

<ADDRESS_LINE4 />

<ADDRESS_LINE3 />

<AS_OF_DATE>01-JAN-08</AS_OF_DATE>

<TAX_REFERENCE_NUM />

<STATE>IL</STATE>

<ADDRESS_LINE2 />


<ADDRESS_LINE1>123 Oak Street</ADDRESS_LINE1>

LETTER “for-each” CUSTOMER

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```
<?for-each G_CUSTOMER?>
<?CUSTOMER_NAME?>
<?ADDRESS_LINE1?>
<?ADDRESS_LINE2?>
<?ADDRESS_LINE3?>
<?ADDRESS_LINE4?>
<?CITY?>
<?STATE?>
<?ZIP?>
<?COUNTRY?>

Dear Sirs/Madam,

According to our records as of <?AS_OF_DATE?>, we show the following open balances.
Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

<?end-for-each?>
```

A. C. Networks
3405 East Bay Blvd.
Provo
UT
84606
US

Dear Sirs/Madam,

According to our records as of 01-JAN-08, we show the following open balances.
Your USD balance 2575752.5 is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

ABC Corporation Americas
300 ABC Parkway
San Francisco
CA
94111
US

Dear Sirs/Madam,

According to our records as of 01-JAN-08, we show the following open balances.
Your USD balance 1827.5 is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

All Star Sports
123 Oak Street
CHICAGO
IL
60601
US

Dear Sirs/Madam,

According to our records as of 01-JAN-08, we show the following open balances.
Your USD balance 13687.5 is made up as follows:



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HEADER/FOOTER/PAGE BREAK

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<?start:body?>

<?for-each:G_CUSTOMER?>

<?CUSTOMER_NAME?>

<?ADDRESS_LINE1?>

<?ADDRESS_LINE2?>

<?ADDRESS_LINE3?>

<?ADDRESS_LINE4?>

<?CITY?>

<?STATE?>

<?ZIP?>

<?COUNTRY?>

Dear Sirs/Madam,

According to our records as of <?AS_OF_DATE?>, we show the following open balances.
Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

Receivables Manager

Break Before<?end:for-each?>

<?end:body?> Please forward payment by ACS/CHAPS to the PPF Levy Collection

Account.

Alternatively send cheques with advance advice to the address below made payable to the PPF Levy Collection Account.

Pension Protection Fund

Knollys House,

17 Addiscombe Road

Croydon, Surrey, CR0 6SR

Header

*anything before <?start:body?>
*don't worry if it spills over

Page break
*I used word Text form to add some code
*<xsl:if xdofo:ctx="inblock" test="position()<count(/G_CUSTOMER)">
name="break-before">page</xsl:attribute>

Footer

*anything after <?end:body?>
*don't worry if it spills over

HEADER/FOOTER/PAGE BREAK

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Header
*anything before `<?start:body?>`
*don't worry if it spills over

Page break
*I used word Text form to add some code
*`<xs:if xdo:ctx="inblock" test="position()<count(/G_CUSTOMER?)>1">`
*`<xs:attribute name="break-before" page="1" />`

Footer
*anything after `<?end:body?>`
*don't worry if it spills over

XML Template Content:

```

<?start:body?>
<?for-each:G_CUSTOMER?>
  <?CUSTOMER_NAME?>
  <?ADDRESS_LINE1?>
  <?ADDRESS_LINE2?>
  <?ADDRESS_LINE3?>
  <?ADDRESS_LINE4?>
  <?CITY?>
  <?STATE?>
  <?ZIP?>
  <?COUNTRY?>

  Dear Sirs/Madam,

  According to our records as of <?AS_OF_DATE?>, we show the following open balances.
  Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

  Please confirm the above information.
  Thanking you in advance, we remain.
  Yours faithfully,

  Receivables Manager

  Break Before<?end:for-each?>
<?end:body?>
  Please forward payment by BACS/CHAPS to the PPF Levy Collection Account.
  Alternatively send cheques with remittance advice to the address below made payable to the PPF Levy Collection Account.

  Pension Protection Fund      Sort Code: 12-20-29
  Knollys House,              Account no: 08067843
  17 Addiscombe Road          Account Name: PPF Levy Collection Account
  Croydon, Surrey, CR0 6SR
  
```

Rendered Output:

A. C. Networks
300 East Bay Blvd
Perry
CA 94900
US

Dear Sir/Madam,

According to our records as of 31-JAN-08, we show the following open balances.
Your USD balance 2570782.5 is made up as follows:

Please confirm the above information.
Thanking you in advance, we remain.
Yours faithfully,

Receivables Manager

Please forward payment by BACS/CHAPS to the PPF Levy Collection Account.
Alternatively send cheques with remittance advice to the address below made payable to the PPF Levy Collection Account.

Pension Protection Fund Sort Code: 12-20-29
Knollys House, Account no: 08067843
17 Addiscombe Road Account Name: PPF Levy Collection Account
Croydon, Surrey, CR0 6SR

INSERT TABLE “for...each” INVOICE

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```
<?start.body?>
<?for-each:G_CUSTOMER?>
  <?CUSTOMER_NAME?>
  <?ADDRESS_LINE1?>
  <?ADDRESS_LINE2?>
  <?ADDRESS_LINE3?>
  <?ADDRESS_LINE4?>
  <?CITY?>
  <?STATE?>
  <?ZIP?>
  <?COUNTRY?>
```

Dear Sirs/Madam,

According to our records as of <?AS_OF_DATE?>, we show the following open balances.
Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

| Invoice Number | Invoice Date | Invoice Amount | Open Balance Amount |
|---|----------------------|------------------|--|
| <?for-each:G_INVOICES?> <?TRX_NUMBER?> | <?TRANSACTION_DATE?> | <?TRANS_AMOUNT?> | <?TRANS_AMOUNT_REMAINING?> <?end-for-each?> |

| | |
|-------------|------------------------|
| Balance Due | <?C_INV_OPEN_BALANCE?> |
|-------------|------------------------|

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,



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INSERT TABLE “for...each” INVOICE

<?ADDRESS_LINE3?>
 <?ADDRESS_LINE4?>
 <?CITY?>
 <?STATE?>
 <?ZIP?>
 <?COUNTRY?>

Dear Sirs/Madam,

According to our records as of <?AS_OF_DATE?>, we show the following open balances.
 Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

| Invoice Number | Invoice Date | Invoice Amount | Open Balance Amount |
|---|----------------------|------------------|--|
| <?for-each:G_INVOICES?> <?TRX_NUMBER?> | <?TRANSACTION_DATE?> | <?TRANS_AMOUNT?> | <?TRANS_AMOUNT_REMAINING?> <?end for-each?> |

| | |
|-------------|------------------------|
| Balance Due | <?C_INV_OPEN_BALANCE?> |
|-------------|------------------------|

INSERT TABLE “for...each” INVOICE

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```

<?startbody?>
<?for-each.G_CUSTOMER?>
  <?CUSTOMER_NAME?>
  <?ADDRESS_LINE1?>
  <?ADDRESS_LINE2?>
  <?ADDRESS_LINE3?>
  <?ADDRESS_LINE4?>
  <?CITY?>
  <?STATE?>
  <?ZIP?>
  <?COUNTRY?>

```

Dear Sirs/Madam,

According to our records as of <?AS_OF_DATE?>, we show the following open balances.
Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

| Invoice Number | Invoice Date | Invoice Amount | Open Balance Amount |
|---|----------------------|------------------|----------------------------|
| <?for-each.G_INVOICES?> <?TRX_NUMBER?> | <?TRANSACTION_DATE?> | <?TRANS_AMOUNT?> | <?TRANS_AMOUNT_REMAINING?> |

Balance Due <?C_INV_OPEN_BALANCE?>

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,

LOOP

LOOP

LOOP

```

<COUNTRY>US</COUNTRY>
<CITY>Provo</CITY>
<CUSTOMER_NUMBER>1143</CUSTOMER_NUMBER>
<ORGANIZATION_NAME>Vision Operations (USA)</ORGANIZATION_NAME>
- <LIST_G_CURRENCY>
- <G_CURRENCY>
  <TRX_CURRENCY_CODE>USD</TRX_CURRENCY_CODE>
- <LIST_G_INVOICES>
- <G_INVOICES>
  <TRX_NUMBER>10019743</TRX_NUMBER>
  <TRANS_TYPE>Standard</TRANS_TYPE>
  <TRANSACTION_DATE>11-NOV-03</TRANSACTION_DATE>
  <TRANS_AMOUNT>144444.48</TRANS_AMOUNT>
  <TRANS_AMOUNT_REMAINING>144444.48</TRANS_AMOUNT_REMAINING>
  <RECEIPT_AMOUNT>0</RECEIPT_AMOUNT>
  <ADJUSTMENT_AMOUNT>0</ADJUSTMENT_AMOUNT>
  <EARNED_DISCOUNT_AMOUNT>0</EARNED_DISCOUNT_AMOUNT>
  <UNEARNED_DISCOUNT_AMOUNT>0</UNEARNED_DISCOUNT_AMOUNT>
  <INVOICE_CREDIT_AMOUNT>0</INVOICE_CREDIT_AMOUNT>
  <BANK_CHARGE>0</BANK_CHARGE>
  <ON_ACCOUNT_CREDIT_AMOUNT>0</ON_ACCOUNT_CREDIT_AMOUNT>
  <ON_ACCOUNT_RECEIPTS>0</ON_ACCOUNT_RECEIPTS>
  <UNAPPLIED_RECEIPTS>0</UNAPPLIED_RECEIPTS>
  <CF_TRANS_AMOUNT>144,444.48</CF_TRANS_AMOUNT>
  <CF_TRANS_AMOUNT_REMAIN>144,444.48</CF_TRANS_AMOUNT_REMAIN>
</G_INVOICES>
- <G_INVOICES>
  <TRX_NUMBER>10019800</TRX_NUMBER>
  <TRANS_TYPE>Standard</TRANS_TYPE>
  <TRANSACTION_DATE>13-NOV-03</TRANSACTION_DATE>
  <TRANS_AMOUNT>141203.15</TRANS_AMOUNT>
  <TRANS_AMOUNT_REMAINING>141203.15</TRANS_AMOUNT_REMAINING>
  <RECEIPT_AMOUNT>0</RECEIPT_AMOUNT>
  <ADJUSTMENT_AMOUNT>0</ADJUSTMENT_AMOUNT>
  <EARNED_DISCOUNT_AMOUNT>0</EARNED_DISCOUNT_AMOUNT>
  <UNEARNED_DISCOUNT_AMOUNT>0</UNEARNED_DISCOUNT_AMOUNT>
  <INVOICE_CREDIT_AMOUNT>0</INVOICE_CREDIT_AMOUNT>
  <BANK_CHARGE>0</BANK_CHARGE>
  <ON_ACCOUNT_CREDIT_AMOUNT>0</ON_ACCOUNT_CREDIT_AMOUNT>
  <ON_ACCOUNT_RECEIPTS>0</ON_ACCOUNT_RECEIPTS>
  <UNAPPLIED_RECEIPTS>0</UNAPPLIED_RECEIPTS>
  <CF_TRANS_AMOUNT>141,203.15</CF_TRANS_AMOUNT>
  <CF_TRANS_AMOUNT_REMAIN>141,203.15</CF_TRANS_AMOUNT_REMAIN>
</G_INVOICES>
- <G_INVOICES>
  <TRX_NUMBER>10019883</TRX_NUMBER>
  <TRANS_TYPE>Standard</TRANS_TYPE>
  <TRANSACTION_DATE>18-NOV-03</TRANSACTION_DATE>
  <TRANS_AMOUNT>125946.85</TRANS_AMOUNT>
  <TRANS_AMOUNT_REMAINING>125946.85</TRANS_AMOUNT_REMAINING>
  <RECEIPT_AMOUNT>0</RECEIPT_AMOUNT>

```

1 of 2 Words: 127 English (U.S.)

90%



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PREVIEW OUTPUT

TEMPLATE

OUTPUT

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```
<?startbody?>
<?for-each:G_CUSTOMER?>
  <?CUSTOMER_NAME?>
  <?ADDRESS_LINE1?>
  <?ADDRESS_LINE2?>
  <?ADDRESS_LINE3?>
  <?ADDRESS_LINE4?>
  <?CITY?>
  <?STATE?>
  <?ZIP?>
  <?COUNTRY?>
```

Dear Sirs/Madam,

According to our records as of <?AS_OF_DATE?>, we show the following open balances.
Your USD balance <?C_INV_OPEN_BALANCE?> is made up as follows:

| Invoice Number | Invoice Date | Invoice Amount | Open Balance Amount |
|---|----------------------|------------------|--|
| <?for-each:G_INVOICES?> <?TRX_NUMBER?> | <?TRANSACTION_DATE?> | <?TRANS_AMOUNT?> | <?TRANS_AMOUNT_REMAINING?> <?end for-each?> |

Balance Due

<?C_INV_OPEN_BALANCE?>

Please confirm the above information.



Allgoods Department Stores
343 Elm Street
CHICAGO
IL
60601
US

Dear Sirs/Madam,

According to our records as of 01-JAN-08, we show the following open balances.
Your USD balance 37777.5 is made up as follows:

| Invoice Number | Invoice Date | Invoice Amount | Open Balance Amount |
|----------------|--------------|----------------|---------------------|
| 10196 | 11-DEC-03 | 16425 | 16425 |
| 10577 | 31-DEC-03 | 9855 | 9855 |
| 10580 | 31-DEC-03 | 11497.5 | 11497.5 |

Balance Due

37777.5

Please confirm the above information.

Thanking you in advance, we remain.

Yours faithfully,



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PRESENTATION OUTLINE

PRESENTATION OUTLINE

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| | Output format tips |

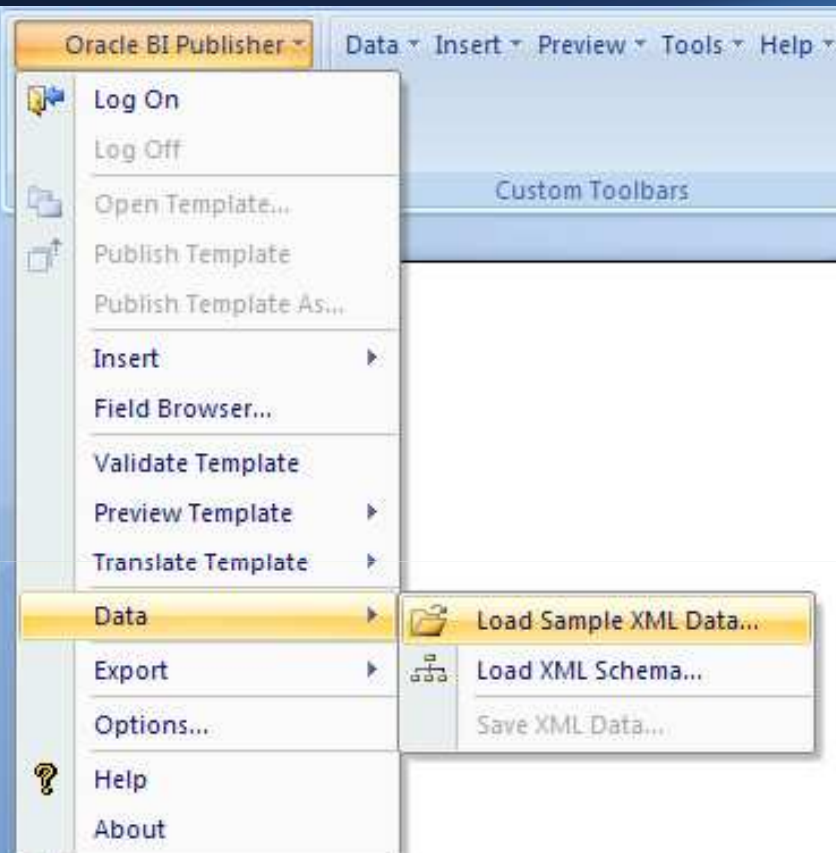
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LOAD the SAMPLE DATA

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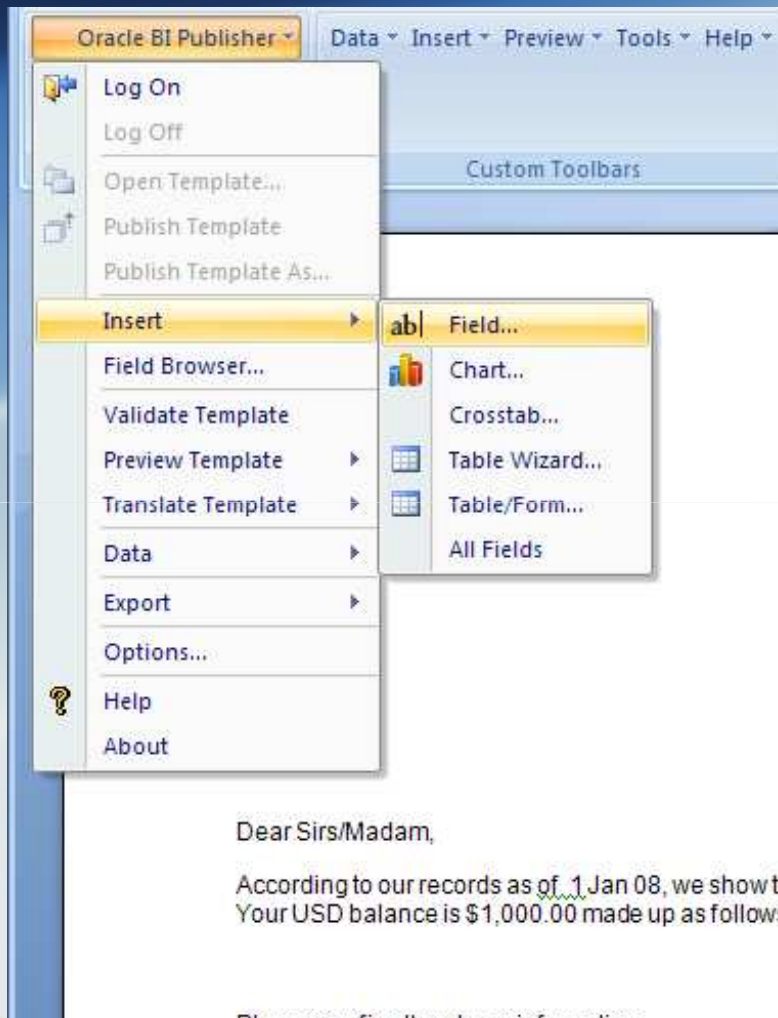
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Dear Sirs/Madam,

According to our records as of 1 Jan 08, we show the following open balances.
Your USD balance is \$1,000.00 made up as follows:

INSERT FIELD or TABLE, etc.



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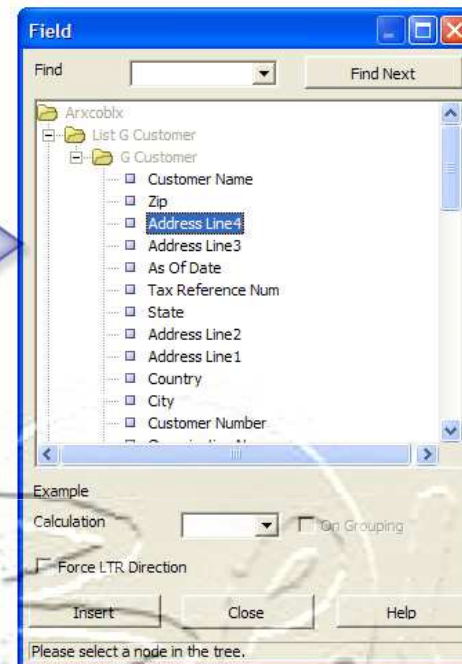
INSERT FIELD

insert fields required
keeping the XML file open will help with any ambiguities

ADDRESS_LINE1
ADDRESS_LINE2
ADDRESS_LINE3

Dear Sirs/Madam,

According to our records as of 1 Jan 08 we show the following open balances



Introduction - Outline of Presentation

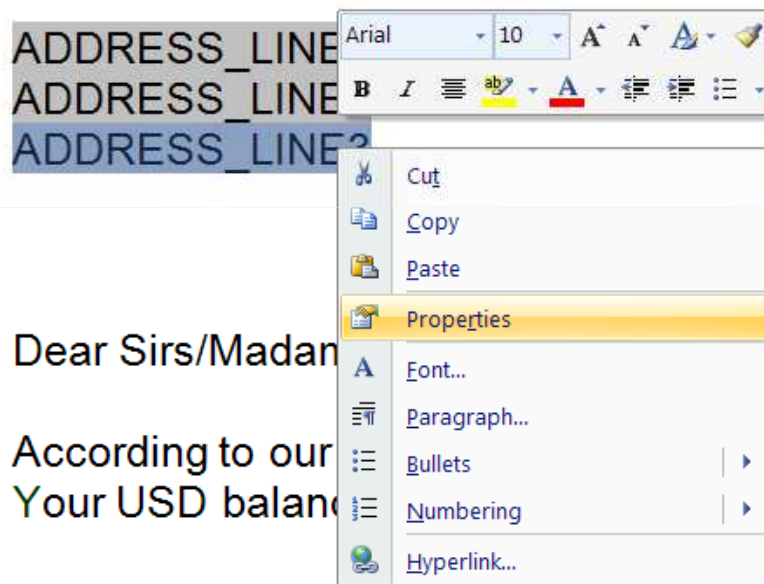
| | |
|---------------|--------------------------------|
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INSERT FIELD – TEXT FIELD

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Dear Sirs/Madan

According to our
Your USD balance

DATE, we show the following open balances.
s follows:

Please confirm the above information

INSERT FIELD – TEXT FIELD

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Text Form Field Options

Text form field

Type: Regular text

Default text: ADDRESS_LINE3

Maximum length: Unlimited

Text format:

Run macro on

Entry:

Exit:

Field settings

Bookmark:

☒ Fill-in enabled

☐ Calculate on exit

Add Help Text...

OK Cancel

Form Field Help Text

Status Bar Help Key (F1)

☐ None

☐ AutoText entry: Simon Tomey (BeLife Ltd.)

☒ Type your own:

<?ADDRESS_LINE3?>

ADDRESS_LINE1
ADDRESS_LINE2
ADDRESS_LINE3

Dear Sirs/Madam,

According to our records as
Your USD balance is

ing open balan



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Check point ...

- What we have covered
- Make it work
- Questions/
Discussion
- More...?

Simon Tomey
CONSULTING DIRECTOR



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Bourne, Lincs PE10 9BU

t: 020 3016 5845

m: 07880 877 977

e: Simon.Tomey@BeLife.co.uk

w: www.BeLife.co.uk



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PRESENTATION OUTLINE

| | |
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| | Introduction |
| How to do it | The 7 Steps – simple example |
| | Improving the example |
| | Using BI publisher add-in |
| Going further | Converting existing GL reports |
| | Going further with templates |
| | Output format tricks |
| | Questions /Knowledge sharing |

EXISTING REPORTS

Introduction - Outline of Presentation

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ORACLE XML Publisher

Templates

Search

Name

Application 

Type

Code

Data Definition

Active

| Name | Application | Data Definition | Type |
|--|----------------|------------------------|------|
| Account Analysis | General Ledger | Account Analysis | RTF |
| Journals - General | General Ledger | Journals - General | RTF |
| Trial Balance - Detail | General Ledger | Trial Balance - Detail | RTF |
| FSG: Basic Template | General Ledger | FSG program | RTF |

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[Templates](#) | [Data Definitions](#) | [Close Window](#) | [Preferences](#) | [Help](#)



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THE SEVEN STEPS – EXISTING REPORTS

Get the Output

1. Chose the report & save output

2. Change output to XML format

3. Save the XML output

Make the template

4. Create an *.RTF template

5. Create a “data definition”

6. Create a “template”

Run report

7. Run the report

CHANGE OUTPUT TO XML

Introduction - Outline of Presentation

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[Templates](#) >

View Template: Journals - General

General

Name Journals - General
Application General Ledger
Type RTF
Default File GLGENJRN_en_US.rtf
Default File Language English
Default File Territory United States

Description

Note the code

Code **GLGENJRN**
Data Definition Journals - General
Start Date 01-Jan-2004
End Date
Subtemplate No

Template Files

Add language-specific template files to support additional languages.

Preview Format

| File Name | Language | Territory | Preview | Download |
|--------------------|----------|---------------|---------|----------|
| GLGENJRN_en_US.rtf | English | United States | | |

[Return to Templates](#)

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CHANGE OUTPUT TO XML

Responsibilities

Find %

| Responsibility | Security Group |
|-----------------------------|----------------|
| General Ledger Super User | Standard |
| Payables Manager | Standard |
| Receivables Manager | Standard |
| System Administrator | Standard |
| XML Publisher Administrator | Standard |

Find OK Cancel

CHANGE OUTPUT TO XML

Concurrent Programs

Program: Journals - General(132 Char) ☒ Enabled

Short Name: GLGENJRN

Application: General Ledger

Description: General Journals - 132

Executable

Name: GLRGNJ Options:

Method: Oracle Reports Priority:

Request

Type:

Incrementor:

MLS Function:

☒ Use in SRS ☒ Allow Disabled Values

☐ Run Alone ☒ Restart on System Failure

☐ Enable Trace ☒ NLS Compliant

Copy to... Session Control Incmpat

Output

Format: Text

☒ Save (C)

☒ Print

Columns: 132

Find Concurrent Program

Find: Journals - General(1 %)

| Program | Short Name | Application |
|------------------------------|------------|----------------|
| Journals - General(132 Char) | GLGENJRN | General Ledger |
| Journals - General(180 Char) | GLGENJRN2 | General Ledger |

Find OK Cancel

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RUN REPORT – text output

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Vision Operations (USA)

Account Analysis Report
Entry Item
Period: Jan-03 To Adj-03

Report

Currency: USD
Accounts From: 01-000-1210-0000-000
To: 01-000-1210-0000-000
Balance Type: Actual
Period: Jan-03

| Source | Category | Batch Name | JE Name | Accounting Flexfield | Description | Entry Item | Debits | Credits |
|--------------------------|----------|------------|----------------|----------------------|-------------|------------|--------|---------|
| Total for Period: Jan-03 | | | | | | | | |
| Beginning Balance: | | | 97,598,047.49 | DR | | | | |
| Ending Balance: | | | 118,694,467.86 | DR | | | | |

□

Vision Operations (USA)

Account Analysis Report
Entry Item
Period: Jan-03 To Adj-03

Report Date: 02-JAN-2008 11:15
Page: 2 of 13

Currency: USD
Accounts From: 01-000-1210-0000-000
To: 01-000-1210-0000-000
Balance Type: Actual
Period: Feb-03

| Source | Category | Batch Name | JE Name | Accounting Flexfield | Description | Entry Item | Debits | Credits |
|--------------------------|----------|------------|---------|----------------------|-------------|------------|--------|---------|
| Total for Period: Feb-03 | | | | | | | | |



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RUN REPORT – browser output

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Pension Protection Fund

Posted Journals
From SEP-0506 to SEP-0506

Report Date: 8-Jan-08
Page: 1 of 1

Currency: GBP

Source: Manual

Batch: JC Bank Charges CHAPS 30-SEP-2005 14:58:44

Balance: Actual

Posted Date: 30-SEP-05

| Journal: Reference: | | | Category: Currency: | | Adjustment GBP | | Effective Date: | |
|------------------------|-------------------------|------------------|------------------------|-----------|-------------------|--------|-----------------|--|
| JC Bank Charges CHAPS | | | JC Bank Charges CHAPS | | | | 30-SEP-05 | |
| Line | Account | Transaction Date | Line Description | Line Item | Debit | Credit | Unit | |
| 10 | 01-0900-44000-0000-0000 | 30-SEP-05 | JC Bank Charges CHAPS | | 12.00 | | 0.00 | |
| 20 | 01-0000-59000-0000-0000 | 30-SEP-05 | JC Bank Charges CHAPS | | | 12.00 | 0.00 | |

Journal Total 12.00 12.00 0.00

Batch Total 12.00 12.00 0.00

Batch: JC Bank charges Sep 05 30-SEP-2005 10:28:36

Balance: Actual

Posted Date: 30-SEP-05

| Journal: Reference: | | | Category: Currency: | | Adjustment GBP | | Effective Date: | |
|------------------------|-------------------------|------------------|------------------------|-----------|-------------------|--------|-----------------|--|
| JC Bank charges Sep 05 | | | JC Bank charges Sep 05 | | | | 30-SEP-05 | |
| Line | Account | Transaction Date | Line Description | Line Item | Debit | Credit | Unit | |
| 10 | 01-0900-44000-0000-0000 | 30-SEP-05 | JC Bank charges Sep 05 | | 5.62 | | 0.00 | |
| 20 | 01-0000-59000-0000-0000 | 30-SEP-05 | JC Bank charges Sep 05 | | | 5.62 | 0.00 | |

Journal Total 5.62 5.62 0.00

Batch Total 5.62 5.62 0.00

Batch: JC Bank charges September 20-SEP-2005 10:09:37

Balance: Actual

Posted Date: 20-SEP-05

| Journal: Reference: | | | Category: Currency: | | Adjustment GBP | | Effective Date: | |
|---------------------------|-------------------------|------------------|---------------------------|-----------|-------------------|--------|-----------------|--|
| JC Bank charges September | | | JC Bank charges September | | | | 20-SEP-05 | |
| Line | Account | Transaction Date | Line Description | Line Item | Debit | Credit | Unit | |
| 10 | 01-0900-44000-0000-0000 | 20-SEP-05 | JC Bank charges September | | 5.62 | | 0.00 | |
| 20 | 01-0000-59000-0000-0000 | 20-SEP-05 | JC Bank charges September | | | 5.62 | 0.00 | |

Journal Total 5.62 5.62 0.00

Batch Total 5.62 5.62 0.00

Batch: JC Bloomberg payment 26/09/05 27-SEP-2005 10:27:43

Balance: Actual

Posted Date: 27-SEP-05

| Journal: | | | Category: | | Adjustment | | Effective Date: | |
|-------------------------------|--|--|-----------|--|------------|--|-----------------|--|
| JC Bloomberg payment 26/09/05 | | | | | | | 27-SEP-05 | |



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RUN REPORT – COPY TO EXCEL

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| | A | B | C | D | E | F | G | H | I | J | K | L | M |
|----|------|-------------------------------------|-----------------------|---------------------------|------------------------|-------|--------|------|---|---|---|---|---|
| 1 | | Parted Journals | Report Date: 8-Jan-08 | | | | | | | | | | |
| 2 | | Period: From SEP-0506 to SEP-0506 | Page: 1 of 1 | | | | | | | | | | |
| 3 | | | | | | | | | | | | | |
| 4 | | Currency: GBP | | | | | | | | | | | |
| 5 | | | | | | | | | | | | | |
| 6 | | | | | | | | | | | | | |
| 7 | | | | | | | | | | | | | |
| 8 | | Source: Manual | | | | | | | | | | | |
| 9 | | | | | | | | | | | | | |
| 10 | | JC Bank Charge | Batch: 14:58:44 | Balance: Actual | Parted Date: 30-Sep-05 | | | | | | | | |
| 11 | | | | | | | | | | | | | |
| 12 | | | | | | | | | | | | | |
| 13 | | Journal: JC Bank Charge CHAPS | Category: Adjustment | Effective Date: 30-Sep-05 | | | | | | | | | |
| 14 | | Reference: JC Bank Charge CHAPS | Currency: GBP | | | | | | | | | | |
| 15 | Line | Account | Transac | Line Description | Line Item | Debit | Credit | Unit | | | | | |
| 16 | 10 | 01-0900-44000-0000-0000 | 30-Sep-05 | JC Bank Charge | | 12 | | 0 | | | | | |
| 17 | 20 | 01-0000-59000-0000-0000 | 30-Sep-05 | JC Bank Charge | | | 12 | 0 | | | | | |
| 18 | | | | | | | | | | | | | |
| 19 | | Journal Total | 12 | 12 | 0 | | | | | | | | |
| 20 | | | | | | | | | | | | | |
| 21 | | | | | | | | | | | | | |
| 22 | | Batch | 42 | 42 | 0 | | | | | | | | |
| 23 | | | | | | | | | | | | | |
| 24 | | | | | | | | | | | | | |
| 25 | | JC Bank Charge | Batch: 10:28:36 | Balance: Actual | Parted Date: 30-Sep-05 | | | | | | | | |
| 26 | | | | | | | | | | | | | |
| 27 | | | | | | | | | | | | | |
| 28 | | Journal: JC Bank charge Sep 05 | Category: Adjustment | Effective Date: 30-Sep-05 | | | | | | | | | |
| 29 | | Reference: JC Bank charge Sep 05 | Currency: GBP | | | | | | | | | | |
| 30 | Line | Account | Transac | Line Description | Line Item | Debit | Credit | Unit | | | | | |
| 31 | 10 | 01-0900-44000-0000-0000 | 30-Sep-05 | JC Bank charge Sep 05 | | 5.62 | | 0 | | | | | |
| 32 | 20 | 01-0000-59000-0000-0000 | 30-Sep-05 | JC Bank charge Sep 05 | | | 5.62 | 0 | | | | | |
| 33 | | | | | | | | | | | | | |
| 34 | | Journal Total | 5.62 | 5.62 | 0 | | | | | | | | |
| 35 | | | | | | | | | | | | | |
| 36 | | Batch | 5.62 | 5.62 | 0 | | | | | | | | |
| 37 | | | | | | | | | | | | | |
| 38 | | | | | | | | | | | | | |
| 39 | | | | | | | | | | | | | |
| 40 | | JC Bank Charge | Batch: 10:09:37 | Balance: Actual | Parted Date: 20-Sep-05 | | | | | | | | |
| 41 | | | | | | | | | | | | | |
| 42 | | | | | | | | | | | | | |
| 43 | | Journal: JC Bank charge September | Category: Adjustment | Effective Date: 20-Sep-05 | | | | | | | | | |
| 44 | | Reference: JC Bank charge September | Currency: GBP | | | | | | | | | | |

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| | Conclusion Questions /Knowledge sharing |

Conclusion

- What we have covered
- Make it work
- Questions/
Discussion

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Recommend XML publisher 5.6.3

see metalink note 422508.1

Subject: **About Oracle XML Publisher Release 5.6.3**

[Doc ID: Note:422508.1](#)

Last Revision Date: 22-MAY-2007

Type: **README**

Status: **PUBLISHED**

About Oracle XML Publisher Release 5.6.3

Last revised: May 22, 2007

See [Change Record](#)

This document provides a complete, up-to-date description of Oracle XML Publisher Release 5.6.3 (Patch [5472959](#)). You should read and understand all tasks described here before you begin your installation. The most current version of About Oracle XML Publisher Release 5.6.3 is Oracle *MetaLink* Document 422508.1. Please ensure that you have the most current version before you begin.

3. [New and Changed Setup Steps](#)
4. [Known Issues](#)
5. [Instructions for Applying Oracle XML Publisher Release 5.6.3](#)
6. [Implementation and User Documentation](#)
7. [Software Updates](#)
8. [About Document Change Record](#)

Target Audience:

- **The Business User:** Provides knowledge and guidance regarding application functionality.
- **The Database Administrator:** Installs and configures the Oracle database and maintains database access controls.
- **The System Administrator:** Responsible for administering systems.

Prerequisite Patch Application Instructions:

1. You must have already completed an installation of, or upgrade to, Oracle Applications Release 11i before advancing to Oracle XML Publisher Release 5.6.3. The patch application instructions in this document are appropriate for starting from any earlier version of Oracle XML Publisher Release 11i.
2. If you do not already have a running Oracle Release 11i system, then you must first install the Oracle E-Business Suite. Please consult the related installation documentation, located on the [Oracle Applications Online Documentation CD](#) on Oracle *MetaLink*. Oracle Applications Online Documentation CD on Oracle *MetaLink*.

Additional Product Information:

After you learn which features are new for your installation, you can find related information for those features by referring to the *most recent* version of your [Oracle XML Publisher User and Implementation Documentation](#). You can also use the other sections of this document to learn about product enhancements made to Oracle XML Publisher Release 5.6.3.

1. New and Changed Features




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Useful Links – Our Site!

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- We're going to publish newsletter periodically. It won't be too profound or flashy, but there's a one or two things about Oracle BI that you might find of interest.
- [Click here](#) to sign up for newsletter



BI (XML) Publisher Resources



Presentation given to UKOUG in Jan & Jul 08 (Temporarily NO password required)

- [Click to download PDF. \(Zipped 5Mb\).](#)
- If you want to know about Oracle XML Publisher Release 5.6.3 - see metalink note Note:422508.1 May-2007. This includes the patch path for 11i and the patches for XML publisher desktop add-in. (You will have to log in to metalink to get this).

BI Publisher -
7 Small Steps for a Consultant
One Giant Leap for User Kind



Read how our hero saves the day with BI



PUBLISHER
COUG Dec 2008

Useful Links - General

Oracle Tech. Network BI Publisher Page

<http://www.oracle.com/technology/products/xml-publisher/index.html>

XML Publisher Forum

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

XML Publisher Blog

<http://blogs.oracle.com/xmlpublisher>

Oracle Wiki - BI Publisher

<http://wiki.oracle.com/page/Oracle+BI+Publisher?t=anon>



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Useful Links - Demos

Oracle BI Publisher Demos

<http://blogs.oracle.com/xmlpublisher>

Oracle by example BI home

http://www.oracle.com/technology/obe/obe_bi/bi.html

Oracle by Example

- XMLP for EBS

http://www.oracle.com/technology/obe/obe_bi/xmlp_ebiz/index.html#t3



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Useful Links – OBIPE & OBIEE

BI Publisher Enterprise – Excel Analyser

http://blogs.oracle.com/xmlpublisher/2007/05/we_want_excel.html

BI Publisher Enterprise – BIP Analysis

<http://blogs.oracle.com/xmlpublisher/2007/05/bipanalysis.html>

Getting Started with Oracle BI Publisher

http://www.oracle.com/technology/obe/obe_bi/bipub/intro/gettingstarted.htm

Advanced Features of Oracle BI Publisher

http://www.oracle.com/technology/obe/obe_bi/bipub/advance/advance.htm