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Siebel Reports in Open UI - Functional Overview

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Safe Harbor

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Open UI Reports

The screenshot displays the Oracle Open UI Reports interface. At the top is a menu bar with 'ORACLE' and options like File, Edit, View, Navigate, Query, Tools, and Help. Below the menu bar is a toolbar with various icons, including a 'Report(s)' icon. A callout box points to this icon with the text: 'Select reports icon to invoke the side menu'. The main area shows a list of accounts with columns: New, Name, Site, Parent, Main Phone #, Status, Account Type, and Action. The first account is 'Benchmark Capital ...' in San Diego. A 'Run Report' dialog box is open on the left, showing 'Report Name: Account List', 'Output Type: PDF', and 'Report Locale: English - United States'. Below the dialog box is a callout: 'New Reports menu with no popups, more intuitive for tablet operation'. At the bottom, a 'Benchmark Capital Group' details form is visible, showing fields for Account Name, Site, Address, City, State, Country, Account Team, Main Phone #, and Main Fax #. A callout box at the bottom left states: 'Reports applet remains open as you navigate views'.

Select reports icon to invoke the side menu

New Reports menu with no popups, more intuitive for tablet operation

Reports applet remains open as you navigate views

New	Name	Site	Parent	Main Phone #	Status	Account Type	Action
★	Benchmark Capital ...	San Diego		(619) 546-3333	Active	Commercial	SADMIN
	FinanceOne Corpor...	San Francisco		(425) 756-4757	Active	Customer	SADMIN
★	Harris Capital Partners	Toronto		(416) 531-1500	Active	Subcontractor	SADMIN
★	Metropolitan Investm...	HQ		(312) 556-9633	Active	Commercial	SADMIN
	AG Edwards & Son...	San Francisco		(415) 742-4500	Active	Commercial	SADMIN
★	Abu Nidal organizati...				Active		SADMIN
	Active Systems - He...	HQ		(650) 755-7555		Customer	SADMIN
	Active Systems - SFO	San Francisco		(650) 555-1212		Customer	SADMIN
	Active Systems - Sa...	San Francisco, USA				Customer	SADMIN
	Albany County Gen...	Albany		(201) 874-2314	Active	Hospital	SADMIN

Benchmark Capital Group

Menu New Delete Query

Account Name: ★ Benchmark Capital Group Site: San Diego Account Team: SADMIN

Address: 800 Silverado St. Suit... State: CA Main Phone #: (619) 546-3333

City: La Jolla Country: USA Main Fax #: (619) 546-8933

Interactive Report Generation

The screenshot displays the Oracle Accounts application interface. At the top, there is a menu bar with options: File, Edit, View, Navigate, Query, Tools, Help. Below the menu bar, a toolbar contains various icons for file operations and navigation. The main navigation pane on the left includes tabs for Home, Accounts, Contacts, Administration - Product, Opportunities, Quotes, Sales Orders, Service, Calendar, and BI Publisher Reports. The 'Accounts' tab is selected, showing a sub-menu with options like Accounts Home, Accounts List, Charts, Global Accounts Hierarchy List, Global Accounts Administration, Account Management, Accounts Administration, Account D&B Explorer, and Service Account Explorer. The 'Run Report' popup applet is open, showing a 'Report Name' dropdown set to 'Account List', 'Custom Name' field, 'Output Type' set to 'PDF', and 'Report Locale' set to 'English - United States'. A 'Run Report Applet' button is visible. The main content area displays a table of accounts with columns: New, Name, Site, Parent, Main Phone #, Status, Account Type, and Account Name. The table lists several accounts, including Benchmark Capital Group, FinanceOne Corporation, Harris Capital Partners, Metropolitan Investments, AG Edwards & Sons, Abu Nidal organization, Active Systems - He..., Active Systems - SFO, Active Systems - Sa..., and Albany County General Hospital. Below the table, there is a detailed view for the 'Benchmark Capital Group' account, showing fields for Account Name, Site, Address, City, State, Country, Account Team, Main Phone #, and Main Fax #.

Same options as before in HI mode popup applets

Dynamic Menus

The screenshot displays the Oracle Accounts application interface. At the top is a menu bar with options: File, Edit, View, Navigate, Query, Tools, Help. Below this is a toolbar with various icons. The main navigation area includes tabs for Home, Accounts, Contacts, Administration - Product, Opportunities, Quotes, Sales Orders, Service, Calendar, and BI Publisher Reports. A secondary navigation bar shows links like Accounts Home, Accounts List, Charts, Global Accounts Hierarchy List, Global Accounts Administration, Account Management, Accounts Administration, and Account D&B Explorer.

A 'Run Report' dialog box is open on the left. It contains the following fields and controls:

- Report Name:** Param
- Custom Name:** (empty text field)
- Output Type:** PDF
- Report Locale:** English - United States
- Schedule:** (empty text field)
- Parameters:** (empty text field)
- Buttons:** My Reports, Submit

The main content area shows a list of accounts under the heading 'My Accounts'. The list has columns: New, Name, Site, Parent, Main Phone #, Status, Account Type, and Account Team. The first row is highlighted in yellow.

New	Name	Site	Parent	Main Phone #	Status	Account Type	Account Team
★	Benchmark Cap...	San Diego		(619) 546-3333	Active	Commercial	SADMIN
	FinanceOne Co...	San Francisco		(425) 756-4757	Active	Customer	SADMIN
★	Harris Capital P...	Toronto		(416) 531-1500	Active	Subcontractor	SADMIN
★	Metropolitan Inv...	HQ		(312) 556-9633	Active	Commercial	SADMIN
	AG Edwards & ...	San Francisco		(415) 742-4500	Active	Commercial	SADMIN
★	Abu Nidal orga...				Active		SADMIN
	Active Systems...	HQ		(650) 755-7555		Customer	SADMIN
	Active Systems...	San Francisco		(650) 555-1212		Customer	SADMIN
	Active Systems...	San Francisco, ...				Customer	SADMIN
	Albany County ...	Albany		(201) 874-2314	Active	Hosted Customer	SADMIN

Below the list, there is a section for 'Benchmark Capital Group' with a '1 of 10+' indicator. It includes buttons for Menu, New, Delete, and Query. Below these are input fields for Account Name (Benchmark Capital Group), Site (San Diego), and Account Team (SADMIN).

Schedule and Parameters sections are dynamic. Select to open/close

Scheduled Report Generation

The screenshot displays the Oracle Accounts application interface. A 'Run Report' popup is open on the left, showing options for Report Name (Account List), Custom Name, Output Type (PDF), Report Locale (English - United States), and Schedule (Run Daily/Weekly, Run Immediately, Run Once, Run Daily/Weekly, Run Monthly). A callout box points to the 'Schedule' dropdown with the text: 'Select 'Schedule' to expose scheduling options'. The main window shows a table of accounts with columns: New, Name, Site, Parent, Main Phone #, Status, Account Type, and Account Name. The table lists several accounts, including Benchmark Capital Group, FinanceOne Corporation, Harris Capital Partners, and Metropolitan Investments. A second callout box points to the 'Run Report' popup with the text: 'Same options as before in HI mode popup applets'. The bottom of the screen shows the 'Benchmark Capital Group' details, including Account Name, Address, City, State, Country, Account Team, Main Phone #, and Main Fax #.

Run Report

Report Name: Account List

Custom Name:

Output Type: PDF

Report Locale: English - United States

Schedule

Frequency: Run Daily/Weekly

Public: Run Immediately, Run Once, Run Daily/Weekly, Run Monthly

Select 'Schedule' to expose scheduling options

New	Name	Site	Parent	Main Phone #	Status	Account Type	Account Name
★	Benchmark Capital Group	San Diego		(619) 546-3333	Active	Commercial	SADMIN
	FinanceOne Corporation	San Francisco		(425) 756-4757	Active	Customer	SADMIN
★	Harris Capital Partners	Toronto		(416) 531-1500	Active	Subcontractor	SADMIN
★	Metropolitan Investments	HQ		(312) 556-9633	Active	Commercial	SADMIN
				(415) 742-4500	Active	Commercial	SADMIN
				(650) 755-7555		Customer	SADMIN
	Active Systems - SFO	San Francisco		(650) 555-1212		Customer	SADMIN
	Active Systems - San Francisco	San Francisco, USA				Customer	SADMIN
	Albany County General Hospital	Albany		(201) 874-2314	Active	Hospital	SADMIN

Benchmark Capital Group

Menu New Delete Query

Account Name: Benchmark Capital Group Site: San Diego Account Team: SADMIN

Address: 800 Silverado St. Suite 100 State: CA Main Phone #: (619) 546-3333

City: La Jolla Country: USA Main Fax #: (619) 546-8933

Same options as before in HI mode popup applets

Scheduled Report Generation

The screenshot displays the Oracle Accounts application interface. On the left, a 'Run Report' dialog box is open, showing options for Report Name (Account List), Custom Name, Output Type (PDF), Report Locale (English - United States), and a Schedule section with Frequency (Run Daily/Weekly), Run Time (0), Start Date, End Date, and Day(s) (Sun). Below the dialog, a text box states: 'Intuitive buttons improve tablet usability'.

The main interface shows a navigation bar with tabs like Home, Accounts, Contacts, Administration - Product, Opportunities, Quotes, Sales Orders, Service, Calendar, and BI Publisher Reports. Below this is a sub-navigation bar with links like Accounts Home, Accounts List, Charts, Global Accounts Hierarchy List, Global Accounts Administration, Account Management, Accounts Administration, Account D&B Explorer, and Service Account Explorer.

The central area displays a table of accounts under the heading 'My Accounts'. The table has columns: New, Name, Site, Parent, Main Phone #, Status, Account Type, and Account Team. The first few rows are highlighted in yellow.

New	Name	Site	Parent	Main Phone #	Status	Account Type	Account Team
★	Benchmark Capital Group	San Diego		(619) 546-3333	Active	Commercial	SADMIN
	FinanceOne Corporation	San Francisco		(425) 756-4757	Active	Customer	SADMIN
★	Harris Capital Partners	Toronto		(416) 531-1500	Active	Subcontractor	SADMIN
★	Metropolitan Investments	HQ		(312) 556-9633	Active	Commercial	SADMIN
	AG Edwards & Sons	San Francisco		(415) 742-4500	Active	Commercial	SADMIN
★	Abu Nidal organization				Active		SADMIN
	Active Systems - He...	HQ		(650) 755-7555		Customer	SADMIN
	Active Systems - SFO	San Francisco		(650) 555-1212		Customer	SADMIN
	Active Systems - Sa...	San Francisco, USA				Customer	SADMIN
	Albany County Gen...	Albany		(201) 874-2314	Active	Hospital	SADMIN

Below the table, there is a section for 'Benchmark Capital Group' with a '1 of 10+' indicator. This section contains a form with fields for Account Name, Site, Account Team, Address, State, Main Phone #, City, Country, and Main Fax #.

Scheduled Report Generation

The screenshot displays the Oracle Accounts application interface. At the top, the Oracle logo and a menu bar (File, Edit, View, Navigate, Query, Tools, Help) are visible. Below the menu bar, there's a toolbar with various icons and a status bar showing '3 Saved Queries: * All Accounts/Companies'. The main navigation area includes tabs for Home, Accounts, Contacts, and various administrative functions. The 'Accounts' tab is active, showing a list of accounts. On the left, a 'Run Report' dialog is open, allowing users to configure report parameters. The dialog includes fields for Report Name (Account List), Custom Name, Output Type (PDF), Report Locale (English - United States), and a Schedule section with Frequency (Run Monthly), Run Time (0), Start Date (12/5/2012), End Date, Month(s) (Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec), and Date(s) (1,8). The main area displays a table of accounts with columns: New, Name, Site, Parent, Main Phone #, Status, Account Type, and Account. The table lists several accounts, including Benchmark Capital Group, FinanceOne Corporation, Harris Capital Partners, Metropolitan Investments, AG Edwards & Son, Abu Nidal organization, Active Systems - He..., Active Systems - SFO, Active Systems - San Francisco, and Albany County General. Below the table, a detailed view for the 'Benchmark Capital Group' is shown, including fields for Name, Site (San Diego), Address (800 Silverado St. Suite...), City (La Jolla), State (CA), Country (USA), Account Team (ADMIN), Main Phone # (619) 546-3333, and Main Fax # (619) 546-8933.

Run Report

Report Name: Account List

Custom Name:

Output Type: PDF

Report Locale: English - United States

Schedule

Frequency: Run Monthly

Run Time: 0

Start Date: 12/5/2012

End Date:

Month(s): Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec

Date(s): 1,8

New	Name	Site	Parent	Main Phone #	Status	Account Type	Account
★	Benchmark Capital Group	San Diego		(619) 546-3333	Active	Commercial	SADMIN
	FinanceOne Corporation	San Francisco		(425) 756-4757	Active	Customer	SADMIN
★	Harris Capital Partners	Toronto		(416) 531-1500	Active	Subcontractor	SADMIN
★	Metropolitan Investments	HQ		(312) 556-9633	Active	Commercial	SADMIN
	AG Edwards & Son	San Francisco		(415) 742-4500	Active	Commercial	SADMIN
★	Abu Nidal organization				Active		SADMIN
	Active Systems - He...	HQ		(650) 755-7555		Customer	SADMIN
	Active Systems - SFO	San Francisco		(650) 555-1212		Customer	SADMIN
	Active Systems - San Francisco	San Francisco, USA				Customer	SADMIN
	Albany County General	Albany		(201) 874-2314	Active	Hospital	SADMIN

Benchmark Capital Group

Menu New Delete Query

Run Report Applet

Name: ★ Benchmark Capital Group

Address: 800 Silverado St. Suite...

City: La Jolla

Site: San Diego

State: CA

Country: USA

Account Team: ADMIN

Main Phone #: (619) 546-3333

Main Fax #: (619) 546-8933

Intuitive buttons
improve tablet usability

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Scheduled Report with Parameters

The screenshot displays the Oracle Accounts application interface. On the left, the 'Run Report' dialog is open, showing the 'Report Name' as 'Param', 'Output Type' as 'PDF', and 'Report Locale' as 'English - United States'. The 'Schedule' section shows 'Frequency' as 'Run Monthly', 'Run Time' as '0', and 'Start Date' as '12/5/2012'. The 'Parameters' section has fields for 'ssLast Name' and 'ssFirst Name'. On the right, the 'My Accounts' table lists various accounts, including 'Benchmark Capital Group'. Below the table, the 'Benchmark Capital Group' account details are shown, including 'Account Name', 'Site', 'Account Team', 'Main Phone #', 'Main Fax #', and 'URL'. A text box overlay states: 'Select 'Parameters' and dynamic parameters are displayed'.

Run Report

Report Name: Param
Custom Name:
Output Type: PDF
Report Locale: English - United States

Schedule

Frequency: Run Monthly
Run Time: 0
Start Date: 12/5/2012
End Date:
Month(s): Jan, Feb, Mar, Apr, May, Jun, Jul, Aug, Sep, Oct, Nov, Dec
Date(s): 1,8
Public Save Data Save Output

Parameters

ssLast Name:
ssFirst Name:
My Reports Submit

My Accounts

New	Name	Site	Parent	Main Phone #	Status	Account Type	Account Team	Account Class	Fun
★	Benchmark Cap...	San Diego		(619) 546-3333	Active	Commercial	SADMIN	Customer	N
	FinanceOne Co...	San Francisco		(425) 756-4757	Active	Customer	SADMIN	Customer	N
★	Harris Capital P...	Toronto		(416) 531-1500	Active	Subcontractor	SADMIN	Customer	N
★	Metropolitan Inv...	HQ		(312) 556-9633	Active	Commercial	SADMIN	Customer	N
	AG Edwards & ...	San Francisco		(415) 742-4500	Active	Commercial	SADMIN	Customer	N
★	Abu Nidal orga...				Active		SADMIN		N
	Active Systems...	HQ		(650) 755-7555		Customer	SADMIN	Customer	N
	Active Systems...	San Francisco		(650) 555-1212		Customer	SADMIN	Customer	N
	Active Systems...	San Francisco, ...				Customer	SADMIN	Customer	N
	Albany County ...	Albany		(201) 874-2314	Active	Hospital	SADMIN	Customer	N

Benchmark Capital Group

Account Name: * Benchmark Capital Group Site: San Diego
Account Team: SADMIN
Main Phone #: (619) 546-3333
Main Fax #: (619) 546-8933
URL: www.benchmark.com

Select 'Parameters' and dynamic parameters are displayed

Parameterized Reports

The screenshot displays the Oracle CRM interface with a 'Run Report' dialog box open. The dialog box includes fields for 'Report Name' (Opportunity List), 'Custom Name', 'Output Type' (PDF), 'Report Locale' (English - United Sta), 'Schedule', and 'Parameters'. A calendar is shown for selecting a date. The background shows a table of opportunities with columns: Opportunity Name, Account, Revenue, Committed, Probability %, Team Space, and Sales Cycle.

Opportunity Name	Account	Revenue	Committed	Probability %	Team Space	Sales Cycle
SIA_Opportunity28	SIA_Account7	\$4,440.00		30%		Approved
SIA_Opportunity29	SIA_Account10	\$6,660.00		20%		02 - Initial Call
SIA_Opportunity30	SIA_Account12	\$7,770.00		30%		01 - New Lead
SIA_Opportunity27	SIA_Account2	\$3,330.00		70%		03 - Quote
SIA_Opportunity26	SIA_Account1	\$5,550.00		30%		02 - Initial Call

Easy to use
Parameter controls

Reports Notifications

The screenshot displays the Oracle Accounts application interface. At the top, there is a menu bar with options: File, Edit, View, Navigate, Query, Tools, Help. Below the menu bar is a toolbar with various icons. The main area is divided into two sections. The top section, titled "Notification Summary", lists several notifications: "SVP Action", "Account Attachment", "Benefits Enrollment", "SVP Action", and "Contact Attachment". The bottom section, titled "My Accounts", contains a table with columns: New, Name, Site, Parent, Main Phone #, and several other columns. The table lists various accounts, including Benchmark Capital Group, FinanceOne Corp., Harris Capital Part., Metropolitan Inves., AG Edwards & So., AIA Provider 1, AIA Provider 2, Abu Nidal organiz., Active Systems - ..., and Active Systems -

User notified when a report is completed

Notification message with hyperlink for instant download

My Reports

The screenshot displays the Oracle My Reports web application. At the top is a navigation bar with the Oracle logo and menu items: File, Edit, View, Navigate, Query, Tools, and Help. A 'Saved Queries' indicator shows 2 saved queries. Below the navigation bar is a toolbar with various icons for report management. The main content area is titled 'My Reports' and includes a breadcrumb trail: Home > Accounts > Contacts > Administration - Product > Opportunities > Quotes > Sales Orders > Service > BI Publisher Reports. A sub-header 'Reports' is active, with 'Scheduled Reports' as an alternative view. The report list table has columns: Report Name, Created Date, Owner, Status, File Size, Output Type, Report Access, and Query String. Two reports are listed: 'param' and 'Account List'. Below the table is a 'Report Parameters' section for the selected report 'param', showing its status as 'Success' and creation date as '12/13/2012 05:37:24 AM'. A callout box on the left states: 'My Reports view same as HI mode'.

My Reports view same as HI mode

Report Name	Created Date	Owner	Status	File Size	Output Type	Report Access	Query String
param	12/13/2012 05:37:24 AM	SADMIN	Success	4,005	PDF	SADMIN	(([Name] LIKE "3")
Account List	12/11/2012 05:05:57 AM	SADMIN	Success	3,888	PDF	SADMIN	(([Name] LIKE "3")

Report Parameters

Report Name: param Status: Success Created Date: 12/13/2012 05:37:24 AM Task Id:

Report Templates

Reports - Standard Templates

Report Name	Description	Start Date	End Date	Primary Integration (Template	Output Type	Default Locale	XLIFF	Selected Records
Account List	Account List			BIP Accounts - C...	aclist	All		aclist	
Account Profile	CG Account Profi...			BIP CG Account ...	CS_accntpro	All		CS_accntpro	
				BIP CG Promotion...	CS_ProPlanDet	All		CS_ProPlanDet	
				BIP Current Acco...	acsvcpro	All		acsvcpro	
				BIP Actual Visits	LS_ACTVIST	All		LS_ACTVIST	
				BIP Admin Produ...	adprodli	All		adprodli	
				BIP Admin Sales ...	ADSLSCYC	All		ADSLSCYC	
				BIP Contacts - AL...	cntphon	All		cntphon	
				BIP Expense Report	exprep	All		exprep	
				BIP Contacts - By...	cntopp	All		cntopp	

My Reports Templates
view same as HI mode

Open UI Reports

Feature	Available
Run Report	8.1.1.9
Report Notifications	8.1.1.10
Scheduling	8.1.1.10
Report Parameters	8.1.1.10
Selected Records	8.1.1.9
Multilingual Reports	8.1.1.9
Mobile Web Client	8.1.1.9

Siebel Reports in Open UI (Doc ID 1493786.1)



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