



Creating PeopleSoft Reports Using XML Publisher

Purpose

This tutorial covers the fundamental features of XML Publisher when it is integrated with Oracle PeopleSoft. You learn how to create templates and reports as well as how to publish your reports.

Time to Complete

Approximately one hour

Topics

This tutorial covers the following topics:

- ☒ Overview
- ☒ Scenario
- ☒ Prerequisites
- ☒ Install Oracle XML Publisher Desktop
- ☒ Modify an Existing Query
- ☒ Create and Register a Data Source
- ☒ Create an RTF Template
 - Load XML Data in a Word Template
 - Create a Pie Chart and a Bar Chart
 - Create a Table
- ☒ Define a New Report
- ☒ Run and View the XML Publisher Report
- ☒ Summary

Overview

XML Publisher is now also called "Oracle Business Intelligence Publisher" (BI Publisher). It is a template-based reporting tool that leverages standard technologies for data extraction and display. XML Publisher segregates the Data Logic from the Presentation Layout during development of the reports and combines them at run time. As a result, although a technical consultant might independently design generalized data extraction logic (using Application Engines/PeopleCode or PSQuery), a functional consultant or end user can design the Presentation using common desktop tools such as Microsoft Word based on the data source created by the technical consultant. Because queries can also be used as a data source, XML Publisher extends the flexibility of the tool essentially to the same people who need to view the reports (end users). This means that end users with minimal training are able to design templates and reports based on generally designed data sources, thus greatly reducing the cost of ownership.

Scenario

The report that you build in this tutorial is a PeopleSoft query that shows the annual rate of salary for three departments: ADMIN, ADMISSION, and ALL_DEPTS. This data is only for the demonstration purposes of this tutorial. You build two ORACLE Creating PeopleSoft Reports Using XML Publisher.doc

Source: http://www.oracle.com/technology/obe/obe_bi/xmlp_ps/index.html

charts and then a table. If you want, you can skip creation of the charts and create only the table.

Prerequisites

To complete this tutorial, you should have:

1. PeopleTools 8.48 running
2. Java Runtime Environment (JRE) 1.4. and Microsoft .Net 2.0
3. Microsoft Word 2000 (or later versions)

Note: Screen captures for this tutorial were taken in a Windows XP environment. Start menu options may thus vary slightly.

Install Oracle XML Publisher Desktop

The XML Publisher Desktop/Template Builder is shipped with PeopleTools 8.48. You can also download the software from the PeopleSoft XML Publisher page.

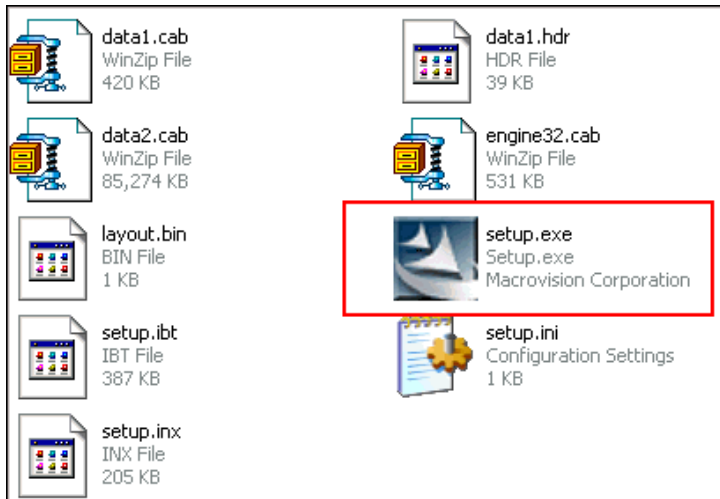
1. From the left navigation bar in PeopleSoft Applications, select **XML Publisher> Setup > Design Helper** to download the Template Builder.



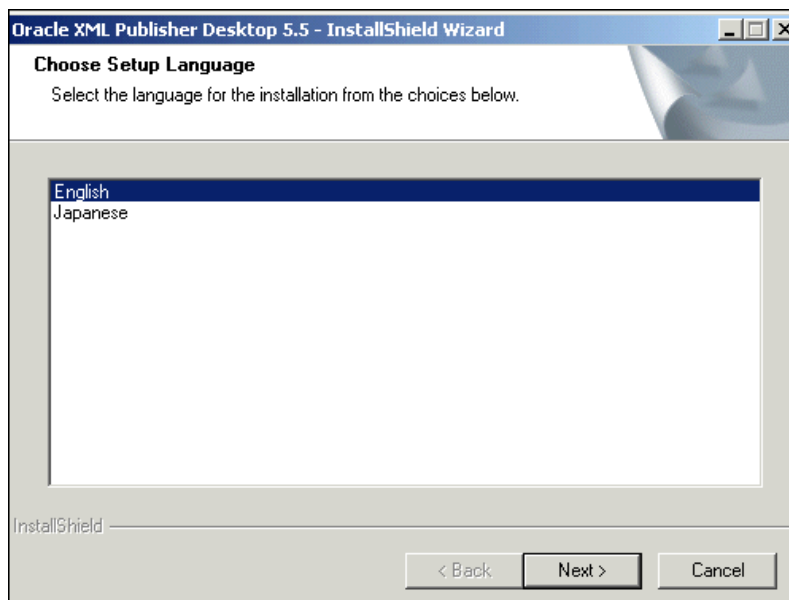
2. Download the Template Builder by clicking the **Plug-in** link. You can save the download anywhere (for example, in **c:\temp**).



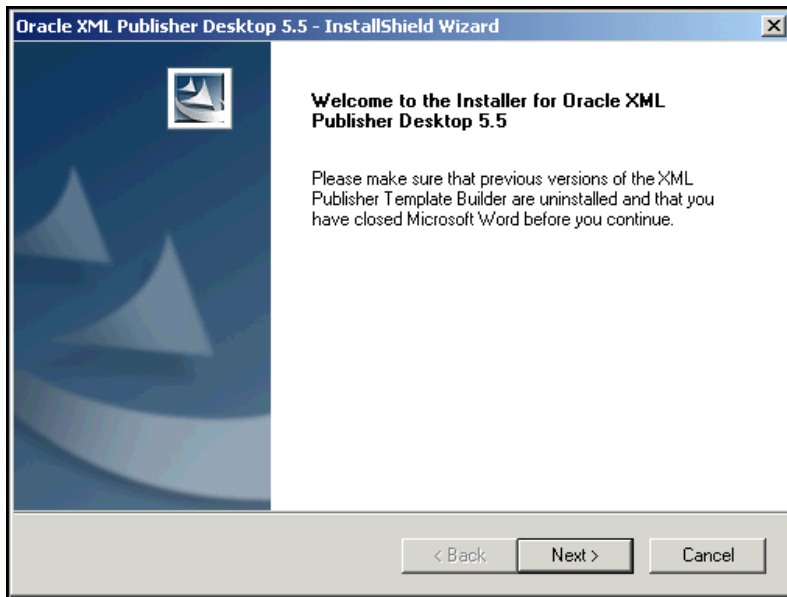
- After the download is complete, install XML Publisher Desktop. Open File Explorer and navigate to the download directory (for example, **c:\temp**). The following example shows the expanded files under **c:\temp\xmlp_desktop**. Double-click **setup.exe** to start the installation process. A set of installation wizard pages guide you through the installation process.



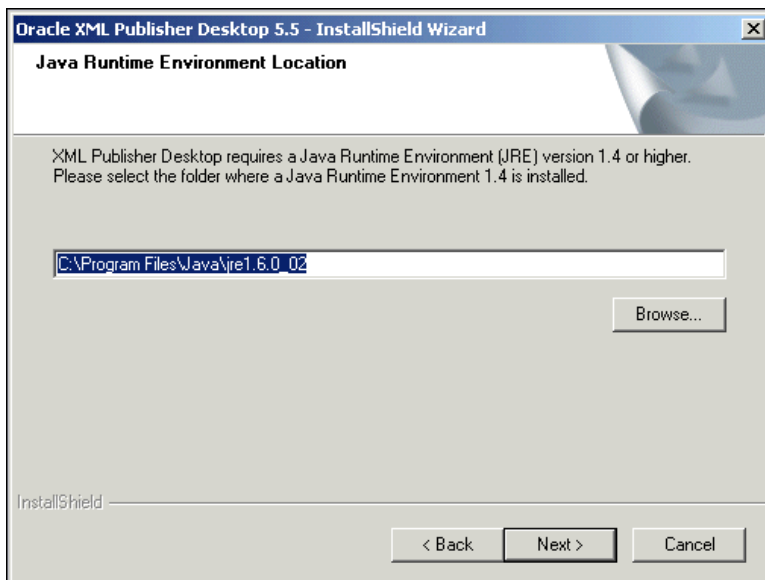
- Select **English**, and then click **Next**.



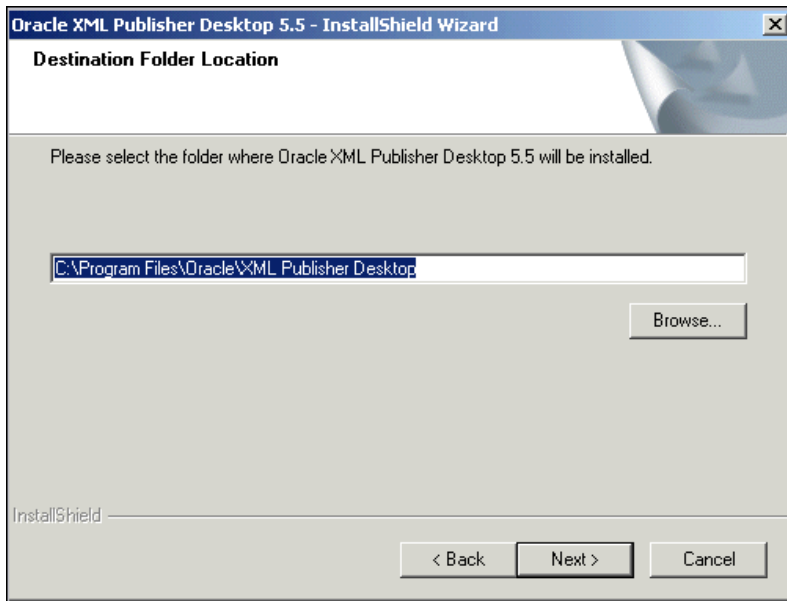
- Ensure that no previous version of XML Publisher Desktop is installed. Click **Next**.



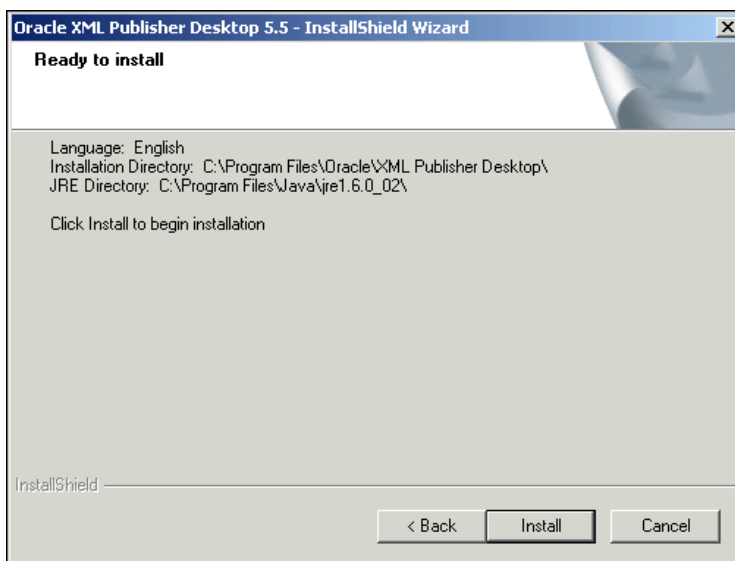
6. The XML Publisher Desktop requires the installation of Java Runtime Environment (JRE) version 1.4 (or later versions). Enter the location for Java Runtime Environment and click **Next**.



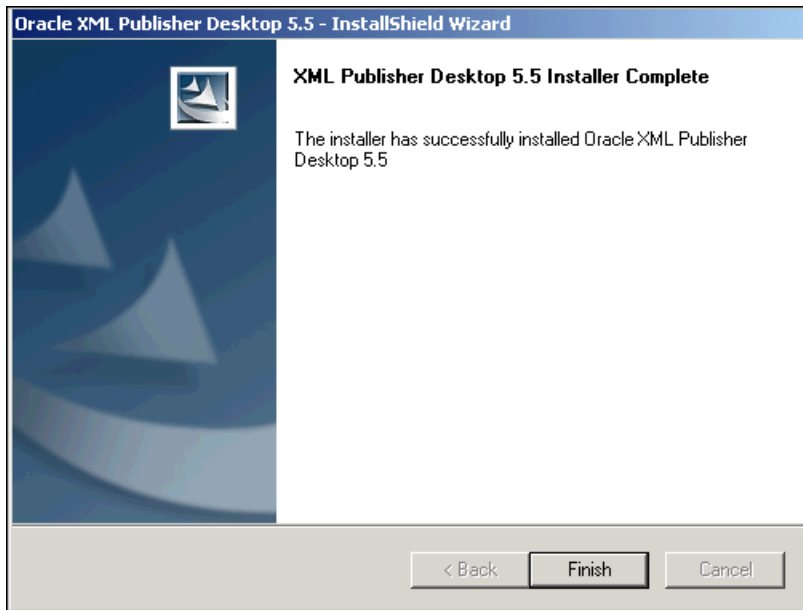
7. Deselect **Open the Word Template Builder Tutorial file** and click **Next**. Enter the name of the folder where you will install XML Publisher Desktop and click **Next**.



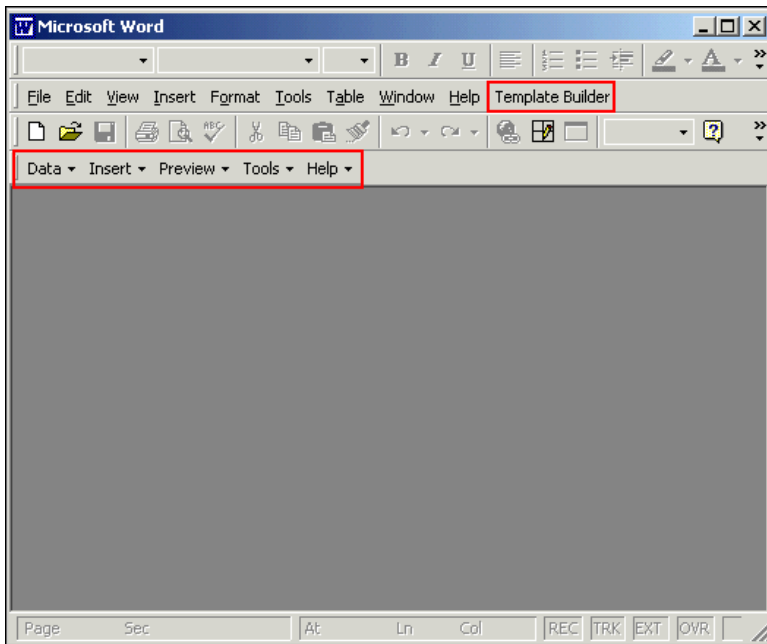
8. Click **Install** for the installation to start.



9. When the installation is complete, click **Finish**.



10. After XML Publisher Desktop is installed, open Microsoft Word. Notice a menu item named **Template Builder** in the menu bar and a new toolbar.



Modify an Existing Query

Initially you modify an existing query, **PERSONAL_DATA_PAY**, and apply criteria on **department id** to reduce the volume of data. To modify the query, perform the following steps:

1. Log in to your PeopleSoft Application. Then, from the left menu, select **Reporting Tools > Query > Query Manager**. Enter **PERSONAL_DATA_PAY** in the **begins with** field. The query **PERSONAL_DATA_PAY** will return.

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Source: http://www.oracle.com/technology/obe/obe_bi/xmlp_ps/index.html

Query Manager

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Query](#) | [Create New Query](#)

*Search By: begins with

[Advanced Search](#)









Search Results

*Folder View:

*Action:

Query	Customize	Find	View All	First	1 of 1	Last	
<input type="checkbox"/> PERSONAL_DATA_PAY	Personal Data Pay Details	Public		Edit	Run to HTML	Run to Excel	Schedule

2. To modify the query, click the **Edit** link under the **Edit** column. All the fields in the query are displayed.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
Query Name: PERSONAL_DATA_PAY		Description: Personal Data Pay Details						
View field properties, or use field as criteria in query statement.								Reorder / Sort
Fields	Customize	Find	View All	First	1-8 of 8	Last		
Col	Record.Fieldname	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit
1	A.EMPLID - EmpID	Char11				ID		Edit
2	A.DEPTID - Department	Char10	1			DeptID		Edit
3	A.JOBCODE - Job Code	Char6				Job Code		Edit
4	A.POSITION_NBR - Position Number	Char8				Position		Edit
5	A.ACCT_CD - Combination Code	Char25				Combo Code		Edit
6	A.ANNUAL_RT - Annual Rate	Num16.3			Sum	Sum Annual Rt		Edit
7	A.MONTHLY_RT - Monthly Rate	Num16.3			Sum	Sum Monthly Rt		Edit
8	A.HOURLY_RT - Hourly Rate	Num13.6			Sum	Sum Hrly Rate		Edit

3. Because the filter will be on **DeptID**, click the filter icon on **DeptID**.

Records	Query	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
Query Name: PERSONAL_DATA_PAY				Description: Personal Data Pay Details				
View field properties, or use field as criteria in query statement.								Reorder / Sort
Fields								
Col	Record.FieldName	Format	Ord	XLAT	Agg	Heading Text	Add Criteria	Edit
1	A.EMPLID - EmplID	Char11				ID	?	Edit
2	A.DEPTID - Department	Char10	1			DeptID	?	Edit
3	A.JOBCODE - Job Code	Char6				Job Code	?	Edit
4	A.POSITION_NBR - Position Number	Char8				Position	?	Edit
5	A.ACCT_CD - Combination Code	Char25				Combo Code	?	Edit
6	A.ANNUAL_RT - Annual Rate	Num16.3			Sum	Sum Annual Rt	?	Edit
7	A.MONTHLY_RT - Monthly Rate	Num16.3			Sum	Sum Monthly Rt	?	Edit
8	A.HOURLY_RT - Hourly Rate	Num13.6			Sum	Sum Hrlly Rate	?	Edit

4. On the **Edit Criteria Properties** page, select **in list** from the **Condition Type** drop-down list.

Edit Criteria Properties

Choose Expression 1 Type

- ☒ Field
- ☐ Expression

***Condition Type:**

- equal to
- equal to
- exists
- greater than
- in list**
- in tree
- is not null
- is null
- less than
- like
- not between
- not equal to

Choose Expression 2 Type

- ☐ Field
- ☐ Expression
- ☒ Constant
- ☐ Prompt
- ☐ Subquery

OK

Cancel

Expression 1

Choose Record and Field

Record Alias.FieldName:

A.DEPTID - Department

5. Click the search icon for **List Members** in the **Edit List** box.

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.FieldName:
A.DEPTID - Department

*Condition Type: In list

Choose Expression 2 Type

☒ In List
☐ Subquery

Expression 2

Edit List

List Members:

OK Cancel

6. Enter **ADMIN** and click **Add Value**.

Edit List

No values have been added yet.

Value: ADMIN Add Value Search

Add Prompt

OK Cancel

7. Similarly, add the departments **ADMISSION** and **ALL DEPTS**. When all the departments are entered for the criteria, click **OK**.

Edit List

List Members Customize Find [Grid Icon] First 1-3 of 3 Last

<input type="checkbox"/>	ADMIN
<input type="checkbox"/>	ADMISSION
<input type="checkbox"/>	ALL DEPTS

Value: Add Value Search Delete Checked Values

Add Prompt

OK Cancel

8. On the **Edit Criteria Properties** page, click **OK**.

Edit Criteria Properties

Choose Expression 1 Type

☒ Field
☐ Expression

Expression 1

Choose Record and Field

Record Alias.Fieldname:
A.DEPTID - Department

***Condition Type:** in list

Choose Expression 2 Type

☒ In List
☐ Subquery

Expression 2

Edit List

List Members: ('ADMIN','ADMISSION','ALL DEPTS')

OK Cancel

9. Click the **Run** tab and run the report. Make sure only three departments (ADMIN, ADMISSION, and ALL DEPTS) are returned. The query should return only 30 rows.

Expr	Expressions	Prompts	Fields	Criteria	Having	View SQL	Run
Download to Excel First 1-30 of 30							
DeptID	Job Code	Position	Combo Code	Sum Annual Rt	Sum Monthly Rt	Sum Hrlly	
ADMIN	700005	19000001		260000.000	21666.667	125.	
ADMIN	700005	19000001		41600.000	3466.667	20.	
ADMISSIONS	PS0002	PS000001		24000.000	2000.000	23.	
ADMISSIONS	PS0003	PS000002		48000.000	4000.000	23.	
ADMISSIONS	PS0003	PS000002		30000.000	2500.000	14.	
ADMISSIONS	PS0004	PS000003		30000.000	2500.000	14.	
ADMISSIONS	PS0004	PS000003		3237.030	269.752	1.	
ADMISSIONS	PS0003	PS000002		36000.000	3000.000	17.	
ADMISSIONS	PS0002	PS000001		12000.000	1000.000	11.	
ADMISSIONS	PS0004	PS000003		48000.000	4000.000	23.	
ADMISSIONS	PS0003	PS000002		30000.000	2500.000	14.	
ADMISSIONS	PS0004	PS000003		24000.000	2000.000	11.	
ADMISSIONS	PS0002	PS000001		80000.000	6666.667	76.	
ADMISSIONS	PS0002	PS000001		10400.000	866.667	10.	
ADMISSIONS	PS0003	PS000002		41600.000	3466.667	20.	
ADMISSIONS	PS0002	PS000001		0.000	0.000	0.	

Create and Register a Data Source

Before you create any report, you must create and register a data source. User queries are data sources that the application uses to retrieve data for an XML Publisher report. XML Publisher supports PS Query, rowsets, XML files, and various other types of data sources. In this tutorial, the query you just modified will be your data source.

ORACLE Creating PeopleSoft Reports Using XML Publisher.doc

Source: http://www.oracle.com/technology/obe/obe_bi/xmlp_ps/index.html

1. Log in to your PeopleSoft Application. Then, in the left navigation bar, expand **Reporting Tools > XML Publisher > Data Source**.

Data Source

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

*Search by: begins with

[Advanced Search](#)


[Find an Existing Value](#) | [Add a New Value](#)

2. Because you will use a PS query, click **Add a New Value**. Select **PS Query** as the **Data Source** type and click the **Look Up Query** search icon for **Data Source ID**.

Data Source

[Find an Existing Value](#) | [Add a New Value](#)

*Data Source Type:

*Data Source ID:  ☐ Private Query

[Find an Existing Value](#) | [Add a New Value](#)

3. Enter **P** in the **begins with** field and click the **Lookup** button.

[New Window](#) | [Help](#)

Look Up Query

*Search by: begins with

[Advanced Lookup](#)

Search Results


Query	Customize	Find	View 100	First	1-30 of 115	Last
Input Name	Description	Owner				
PER006 EE MAILING LABELS	PER006--EE mailing labels	Public				
PER055ES	Union Fees per Month	Public				
PER107GR EE INT PROF EDUCATION	Trainees IPE Status	Public				
PER537 COMPETENCY LISTING	PER537--Competency Listing	Public				
PER701 DEPT TBL	PER701--Dept Tbl	Public				
PER702 INSTALLATION TBL	PER702--Installation Tbl	Public				
PER703 COURSE TBL	PER703--Course Tbl	Public				
PER704 LICENSE CERT TBL	PER704--License/Cert Tbl	Public				
PER705 LOCATION TBL	PER705_Location Table	Public				
PER706A SALARY GRADE TBL	PER706A_SalaryGrade Tbl	Public				

4. Scroll down and click **PERSONAL_DATA_PAY**.

Data Source

[Find an Existing Value](#) | [Add a New Value](#)

*Data Source Type:

*Data Source ID:  ☐ Private Query

[Find an Existing Value](#) | [Add a New Value](#)

5. Click the **Add** button on the **Data Source** page.

Data Source

Data Source Type: PS Query

Data Source ID: PERSONAL_DATA_PAY

Data Source Properties

Description: ☒ Active

Object Owner ID:

Registered Date/Time: 10/11/07 3:27:22PM Registered By: PS

Last Update Date/Time: 10/15/07 2:01:14PM Updated By: PS

Related Files

File Type	File	Generate File
Sample Data File		Generate
Schema File		Generate

6. On the **Data Source** page, in the **Data Source Properties** section, enter the **Description** as **Departmental Annual Salary**. Click **Generate** under the **Generate File** column for **Sample Data File**.

Data Source

Data Source Type: PS Query
Data Source ID: PERSONAL_DATA_PAY

Data Source Properties

Description: Departmental Annual Salary ☒ **Active**

Object Owner ID:

Registered Date/Time: 10/11/07 3:27:22PM **Registered By:** PS
Last Update Date/Time: 10/16/07 3:14:16PM **Updated By:** PS

Related Files

File Type	File	Generate File
Sample Data File		Generate
Schema File		Generate

7. After the data source is generated, an XML file for **PERSONAL_DATA_PAY** is created. Click the **Save** button.

Data Source

Data Source Type: PS Query
Data Source ID: PERSONAL_DATA_PAY

Data Source Properties

Description: Departmental Annual Salary ☒ **Active**

Object Owner ID:

Registered Date/Time: 10/11/07 3:27:22PM **Registered By:** PS
Last Update Date/Time: 10/16/07 3:14:16PM **Updated By:** PS

Related Files

File Type	File	Generate File
Sample Data File	PERSONAL_DATA_PAY.XML	Regenerate
Schema File	PERSONAL_DATA_PAY.XSD	Regenerate

8. Click the **PERSONAL_DATA_PAY.XML** file. The browser appears and displays the XML data in the file. Save the XML file in the **C:\temp** folder.

```

<?xml version="1.0" ?>
- <query numrows="10" queryname="PERSONAL_DATA_PAY" x
  xsi:noNamespaceSchemaLocation="">
- <row rownumber="1">
  <EMPLID>EMPLID samp</EMPLID>
  <DEPTID>DEPTID sam</DEPTID>
  <JOBCODE>JOB COD</JOB CODE>
  <POSITION_NBR>POSITION</POSITION_NBR>
  <ACCT_CD>ACCT_CD sample data</ACCT_CD>
  <ANNUAL_RT>861669449102975.927</ANNUAL_RT>
  <MONTHLY_RT>913782747109801.774</MONTHLY_RT>
  <HOURLY_RT>470060783479.334436</HOURLY_RT>
</row>
- <row rownumber="2">

```

Create an RTF Template

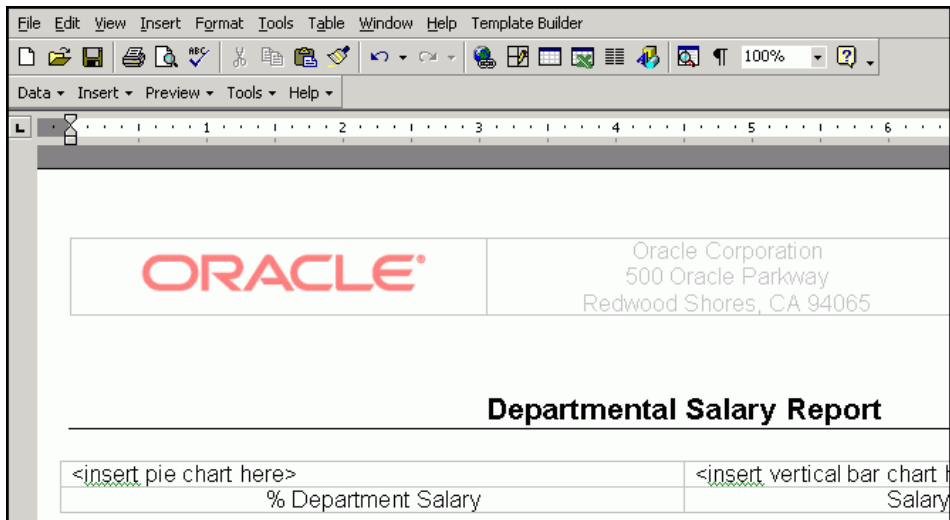
You use a Microsoft Word plug-in to build an RTF template. You use a preexisting RTF template file named **Personal_Data_Pay.rtf**. Download the template from [here](#) and save the RTF file under c:\temp.

- ☒ Load XML Data in a Word Template
- ☒ Create a Pie Chart and a Bar Chart
- ☒ Create a Table

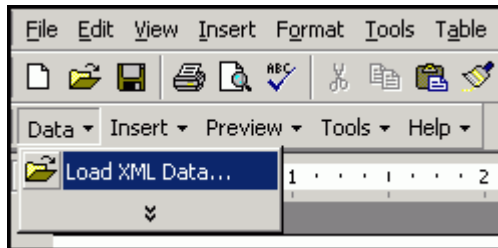
Load XML Data in a Word Template

You open a base template and load the XML data. To load the XML data, perform the following steps:

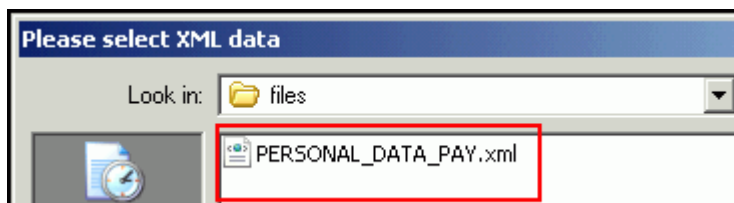
1. Open the file named **Personal_Data_Pay.rtf** in Microsoft Word



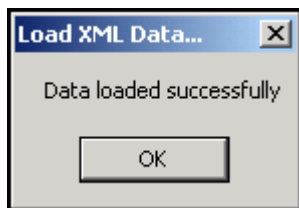
2. Click **Data** and select **Load XML Data**.



3. In the **Please select XML data** dialog box, select the **PERSONAL_DATA_PAY.xml** file and click **Open**.



4. When the "Data loaded successfully" message appears, click **OK**.

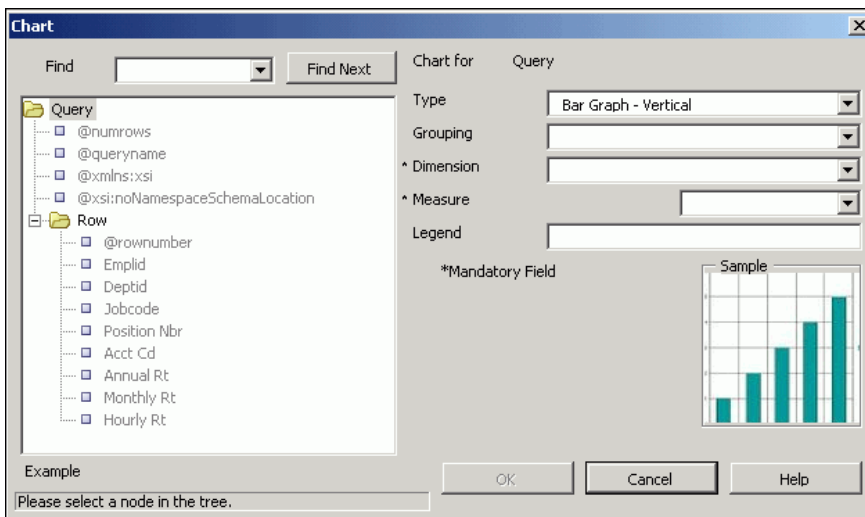


Create a Pie Chart and a Bar Chart

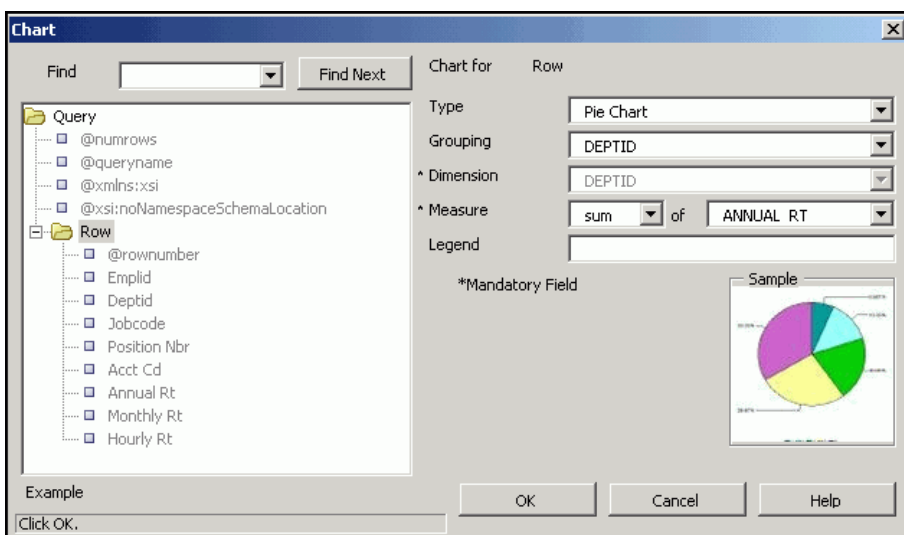
If you do not want to create a pie chart or a bar chart, skip this section.

To create a pie chart and a bar chart, perform the following steps:

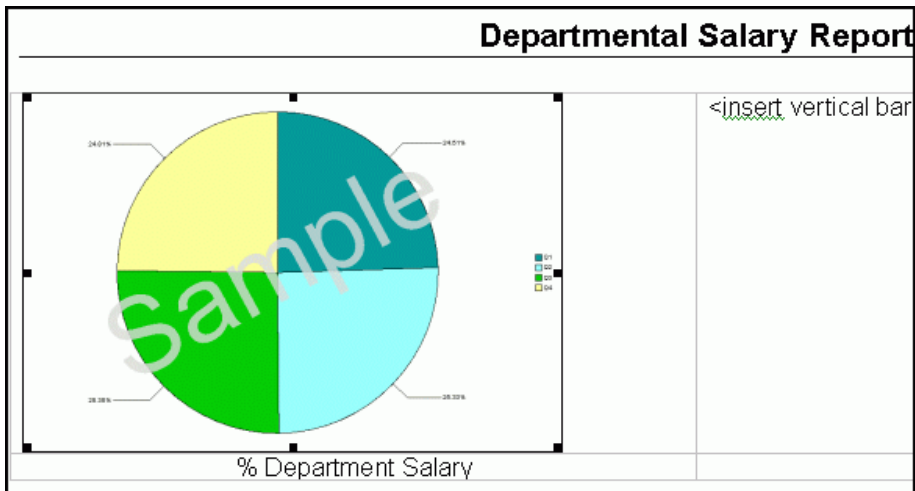
1. From the first cell in the table, delete the text **<insert a pie chart here>**. From the menu, select **Insert > Chart**.



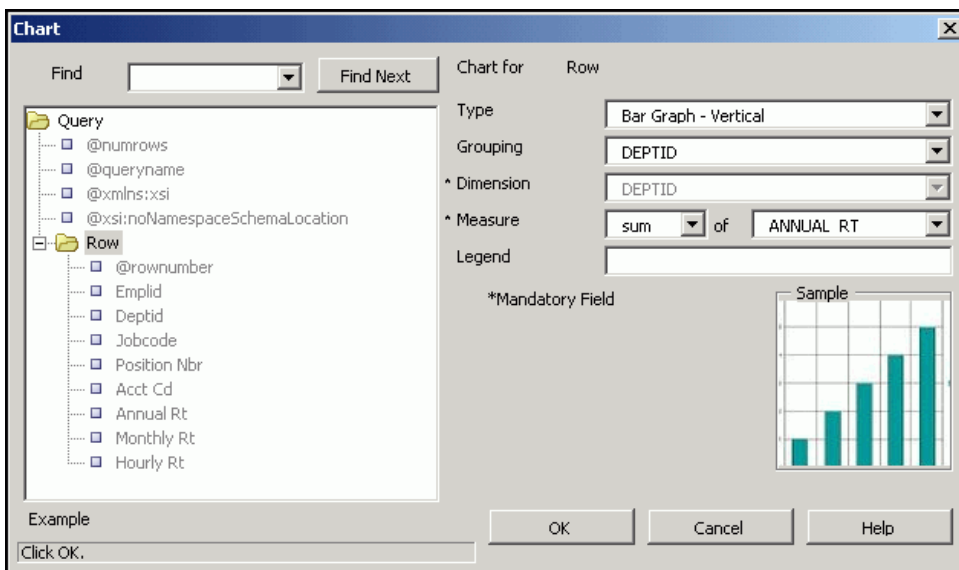
2. In the **Chart** window, select **Row** and enter the details as shown below.



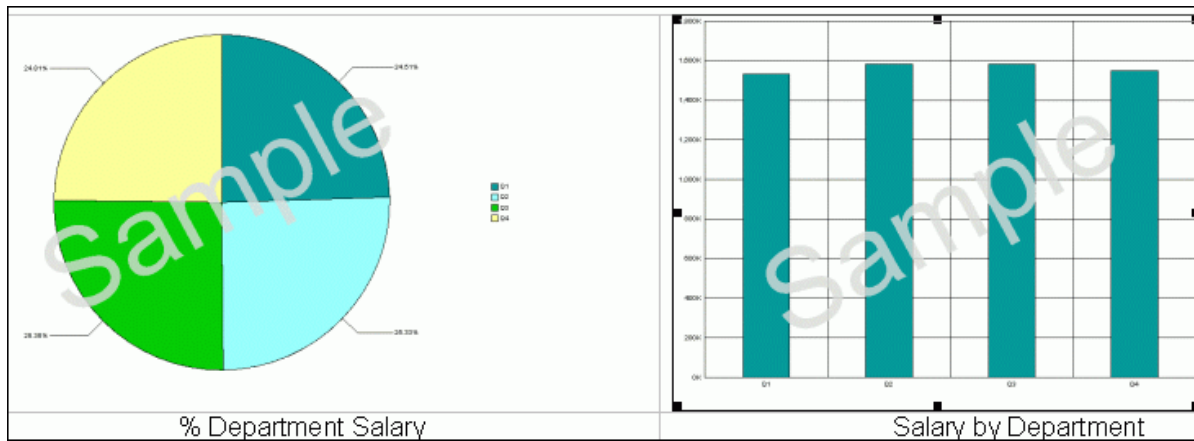
3. Click **OK**. Resize the pie chart to fit within the width of the cell.



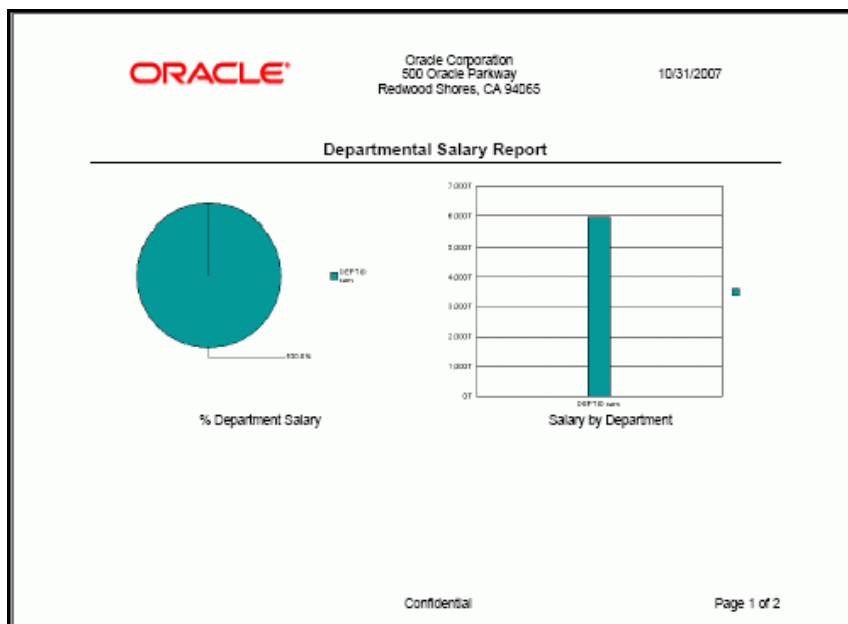
4. Similarly insert a bar chart. Delete the text **<insert a vertical bar chart here>**. Select **Insert>Chart** from the menu. In the **Chart** window, select **Row** and enter the details as shown.



5. Click **OK**. Resize the bar chart.



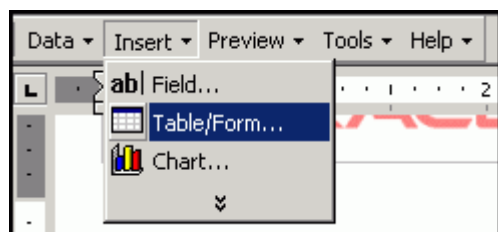
6. Save the template and preview in PDF format. Click **Preview** and select **PDF** from the drop-down list.



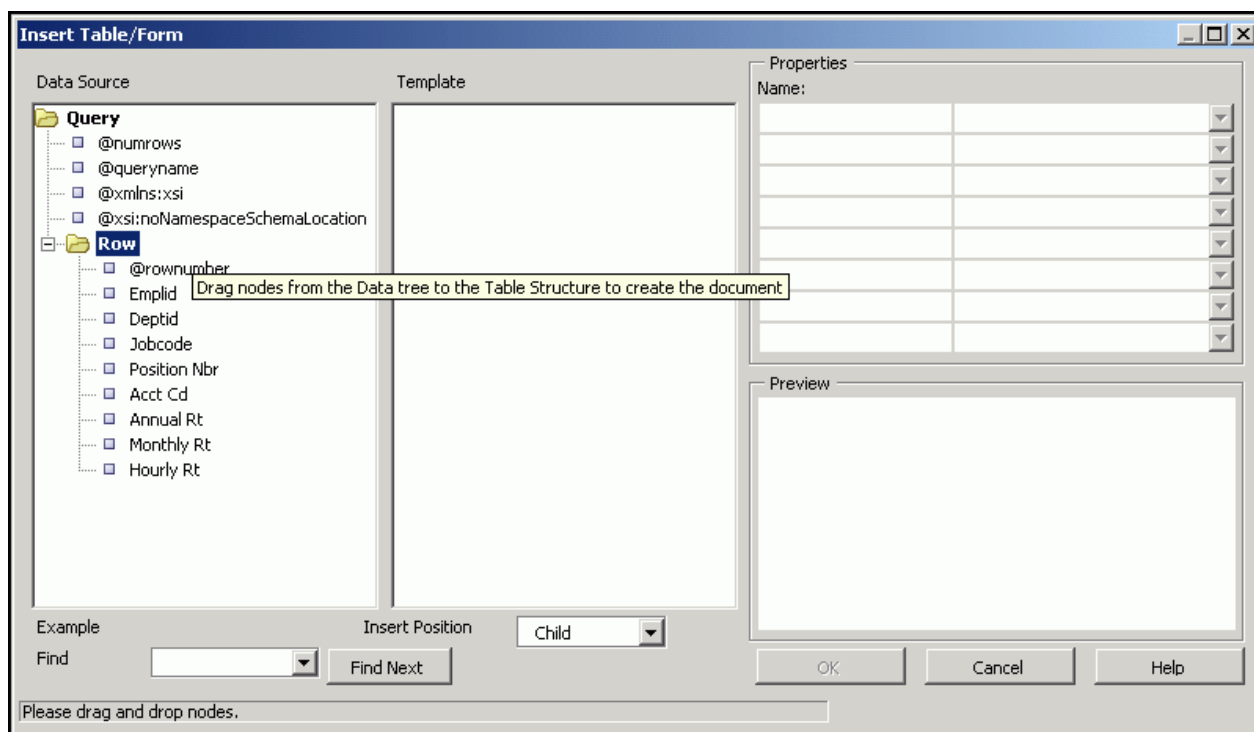
Create a Table

You create a tabular report for which you have already loaded the data. To create a table, perform the following steps:

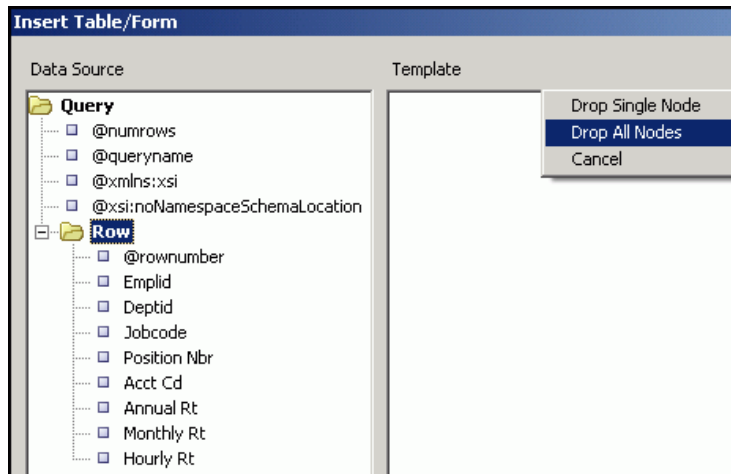
1. Move the cursor below the table for the charts, add some blank lines, and insert a new table. Click **Insert** and select **Table/Form..** from the drop-down list.



2. The Insert Table/Form window appears. Select **Row** from the **Data Source** list on the left.



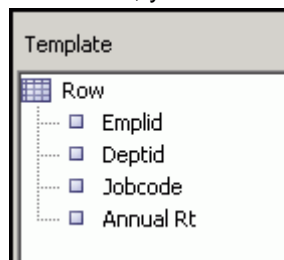
3. Drag **Row** from the left to the **Template** column and select **Drop all Nodes**.



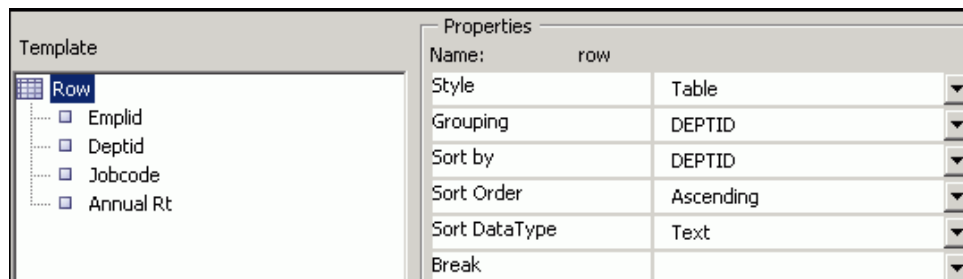
4. Delete the following fields by selecting the field and clicking the delete button:

- @rownumber
- Position Nbr
- Acct Cd
- Monthly Rt
- Hourly Rt

As a result, you should have four fields.



5. Provide grouping details. Select **Row** in the template column and, from the properties window, select **DEPTID** from the drop-down list for the **Grouping** property.



6. Click **OK**. You are returned to Word. Resize the table to match the image below by dragging the sizing handles for the columns.

Deptid	Deptid		
G DEPTID	Emplid	Jobcode	Annual Rt
	F EMPLID	JOBCODE	ANNUAL_RT E
	E		

7. Use Word features and select the G DEPTID field and cut and paste above the table.

G DEPTID			
Deptid	Deptid		
	Emplid	Jobcode	Annual Rt
	F EMPLID	JOBCODE	ANNUAL_RT E
	E		

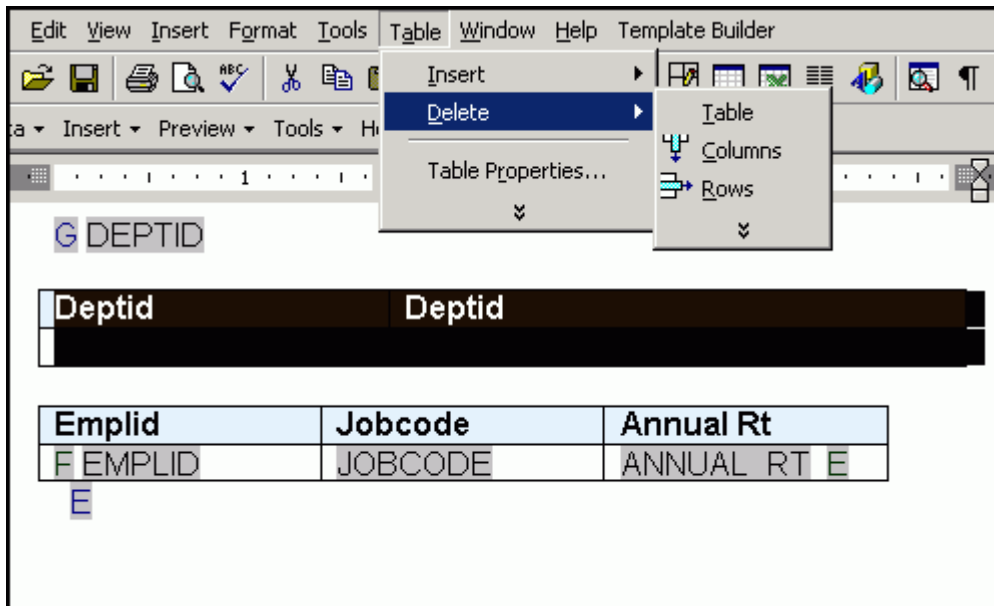
8. Select the inner table and the control character E (as shown).

G DEPTID			
Deptid	Deptid		
	Emplid	Jobcode	Annual Rt
	F EMPLID	JOBCODE	ANNUAL_RT E
	E		

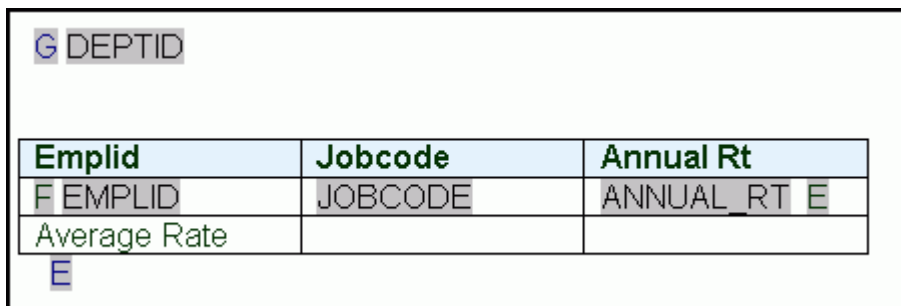
9. Cut and paste the selected area a few lines below the outer table.

G DEPTID			
Deptid	Deptid		
Emplid	Jobcode	Annual Rt	
F EMPLID	JOBCODE	ANNUAL_RT	E
E			

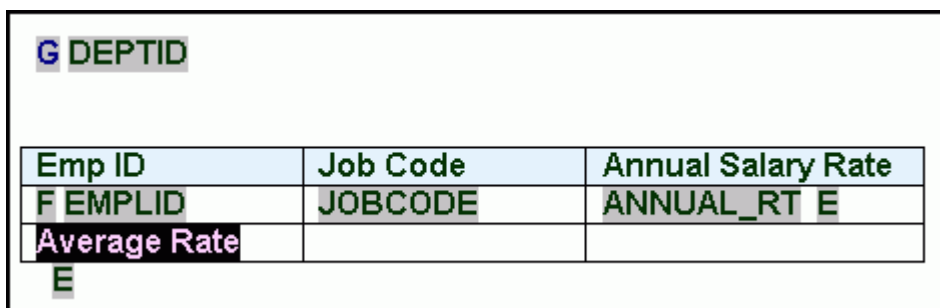
10. Delete the outer table. Select the outer table and, from the menu, select Table > Delete > Table.



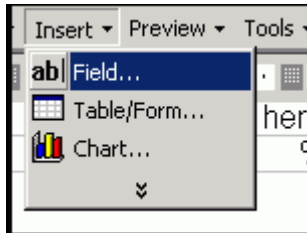
11. Enter a new row at the end of the table to display the department average annual rate. Place the cursor inside the row of the table and, from the menu, select Table > Insert > Rows Below. Enter Average Rate for the first column in the new row.



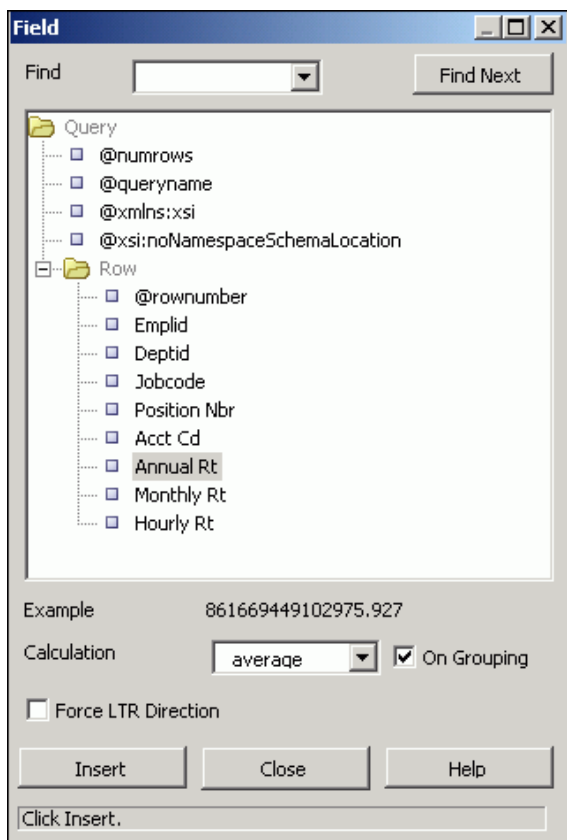
12. Change the column headings as shown.



13. Add a department average rate field to the last row in the Annual Salary Rate column. Click anywhere in the empty Annual Salary Rate column of the Total row to position your cursor. Select **Insert > Field**.



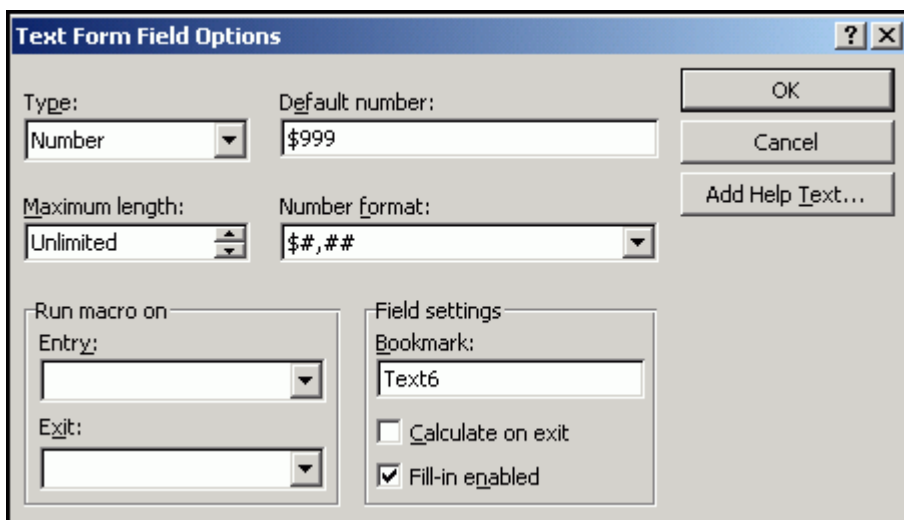
14. In the **Field** window, select **Annual Rt** and **average** for **Calculation**. Select the **On Grouping** check box. Click **Insert** and then click **Close**.



15. Your table should look like the image below:

G DEPTID		
Emp ID	Job Code	Annual Salary Rate
F EMPLID	JOBCODE	ANNUAL_RT E
Average Rate		average ANNUAL_RT
E		

16. Change the format of the column data for **Annual Salary Rate**. Double click **ANNUAL_RT**. The **Text Form Field Options** window appears. Change **Type** to **Number**. Select the **Number** format **\$\$,##0.00** and edit it as shown. Enter **\$999** in the **Default** number field. Click **OK**.




The **Text Form Field Options** dialog box is shown. The **Type** is set to **Number**. The **Default number** is **\$999**. The **Number format** is **\$\$,##**. The **Field settings** section shows **Bookmark** set to **Text6**, **Calculate on exit** is unchecked, and **Fill-in enabled** is checked.

17. Similarly change the format for average **ANNUAL_RT**.

E		
Emp ID	Job Code	Annual Salary Rate
F EMPLID	JOBCODE	\$9,99 E
Average Rate		\$9,99

18. Save the template and preview in PDF format. Select **Preview > PDF**. The preview report displays dummy data.



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11/1/2007

DEPTID sam

Emp ID	Job Code	Annual Salary Rate
EMPLID samp	JOBCOD	\$861,669,449,102,976
EMPLID samp	JOBCOD	\$568,005,860,605,212
EMPLID samp	JOBCOD	\$922,109,066,118,844
EMPLID samp	JOBCOD	\$838,174,735,794,880
EMPLID samp	JOBCOD	\$641,097,399,372,089
EMPLID samp	JOBCOD	\$327,142,293,690,475
EMPLID samp	JOBCOD	\$451,459,306,079,478
EMPLID samp	JOBCOD	\$183,149,045,492,654
EMPLID samp	JOBCOD	\$678,726,726,854,292
EMPLID samp	JOBCOD	\$481,909,185,109,829
Average Rate		\$595,344,306,822,073

You can add other Word features to the template.

Define a Report

You now define a report with the RTF template that you created. To define the report, perform the following steps:

1. Select **XML Publisher > Report Definition**.

Report Definition

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) | [Add a New Value](#)

*Search by: Report Name begins with

☐ Include History ☐ Correct History

Search [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)


2. On the **Report Definition** page, click **Add a New Value**. Enter the report name **PERSONAL_PAY**.

Report Definition

[Find an Existing Value](#) | [Add a New Value](#)

Report Name:

*Data Source Type: PS Query

Data Source ID:  ☐ Private Query


Add

3. For **Data Source ID**, click the **Look up Datasource** icon.

Report Definition
[Find an Existing Value](#) | [Add a New Value](#)

Report Name: PERSONAL_PAY

***Data Source Type:** PS Query

Data Source ID:  ☐ **Private Query**

[Find an Existing Value](#) | [Add a New Value](#)

4. Enter **P** in the **begins with** field and click the **Lookup** button.

Look Up Data Source

***Search by:** Data Source ID begins with


[Advanced Lookup](#)

5. From the list, select **PERSONAL_DATA_PAY** as the data source. Click the **Add** button.


Report Definition
[Find an Existing Value](#) | [Add a New Value](#)

Report Name: PERSONAL_PAY


***Data Source Type:** PS Query

Data Source ID: PERSONAL_DATA_PAY  ☐ **Private Query**

6. On the **Definition** tab, enter a description for the report. Select **Active** as the **Report Status**.

Definition		Template	Output	Security	Bursting
Report Name:	PERSONAL_PAY				
Data Source					
Data Source Type:	PS Query				
Data Source ID:	PERSONAL_DATA_PAY				
Data Source Description:	Departmental Annual Salary				
Report Properties					
Report Description:	<input type="text" value="Departmental Salary"/>				
*Report Status:	<input type="text" value="Active"/>				
*Report Category ID:	<input type="text"/> 				
Object Owner ID:	<input type="text"/>				
Template Type:	<input type="radio"/> PDF <input checked="" type="radio"/> RTF <input type="radio"/> eText <input type="radio"/> XSL				
Days Before Purge:	<input type="text"/>				
Registered Date/Time:	Registered By:				
Updated Date/Time:	Updated By:				
Download:	Data Schema Sample Data				

7. Click the lookup icon for **Report Category ID**.

Definition		Template	Output	Security	Bursting
Report Name:	PERSONAL_PAY				
Data Source					
Data Source Type:	PS Query				
Data Source ID:	PERSONAL_DATA_PAY				
Data Source Description:	Departmental Annual Salary				
Report Properties					
Report Description:	<input type="text" value="Departmental Salary"/>				
*Report Status:	<input type="text" value="Active"/>				
*Report Category ID:	<input type="text"/> 				
Object Owner ID:	<input type="text"/> <small>Look up Report Category ID (Alt+5)</small>				
Template Type:	<input type="radio"/> PDF <input checked="" type="radio"/> RTF <input type="radio"/> eText				

8. Select the **ALLUSER** category.

Look Up Report Category ID

Search by: begins with

[Advanced Lookup](#)

Search Results

View All First 1 of 1 Last

Report Category ID	Description	Object owner identifier
ALLUSER	All PeopleSoft User	PeopleTool

9. On the **Template** tab, upload the RTF template. Set the template **Status** to **Active**.

Definition **Template** Output Security Bursting

Report Name: PERSONAL_PAY

Template

Find | View All First 1 of 1 Last

*Template ID: ☒ Default Template

Description:

*Language Code: Channel:

Template Files

Find | View All First 1 of 1 Last

*Effective Date:

*Status:

Template File:

10. Click the **Upload** button. Browse for the **Personal_Data_Pay.rtf** template and click **Upload**.

11. On the **Output** tab, select **PDF** as the default output. Click **Save**. You can now view the report in the Report Viewer.

Definition Template **Output** Security Bursting

Report Name: PERSONAL_PAY

General

☐ PDF report output may be edited

Runtime Output Format Options

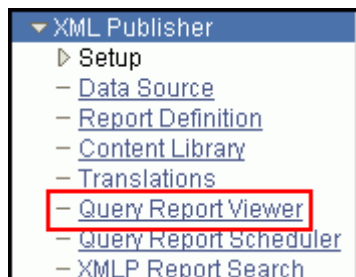
Format Type	Enabled	Default
HTML	<input checked="" type="checkbox"/>	<input type="checkbox"/>
PDF	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RTF	<input checked="" type="checkbox"/>	<input type="checkbox"/>
XLS	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Output Location

*Location: Any

Run and View the XML Publisher Report

- 1 From the left navigation bar in PeopleSoft Applications, select **Reporting Tools > XML Publisher > Query Report Viewer**.



- 2 On the **Query Report Viewer** page, click the **Search** button.

Query Report Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

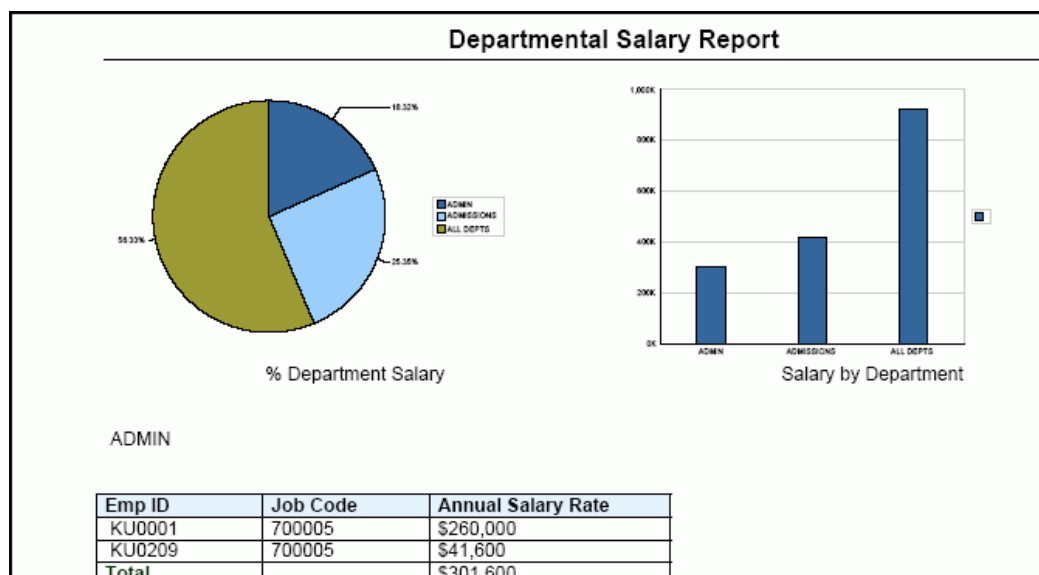
*Search by: Report Name begins with

[Advanced Search](#)

3 From the list of reports, select **PERSONAL_PAY** and then click **View Report**.

PAY2	PAY2	PERSONAL_DATA_PAY	HTM	N	View Report
PAY3	aaaa	PERSONAL_DATA_PAY	HTM	N	View Report
PAY4	bbbb	PERSONAL_DATA_PAY	HTM	N	View Report
PAY_DATA	Personal Pay	PERSONAL_DATA_PAY	HTM	N	View Report
PERSONAL_PAY	Departmental Salary	PERSONAL_DATA_PAY	PDF	N	View Report

4 While the report is being processed, the word **Processing** appears at the top. After processing is complete, a three-page PDF report is displayed with charts and a table.



Congratulations! You just created a report in PeopleSoft Applications using XML Publisher!

Summary

In this lesson, you learned how to:

- ☒ Install Oracle XML Publisher Desktop
- ☒ Modify an existing query
- ☒ Create and register a data source
- ☒ Create an RTF template
- ☒ Define a new report
- ☒ Run and view the XMLP report

Related Information

In this tutorial, you learned how to create reports using XML Publisher in a PeopleSoft environment. XML Publisher is also available as a stand-alone product known as "Oracle Business Intelligence Publisher" (BI Publisher). BI Publisher has easy-to-use wizards and additional features that enable access to a wider range of data sources, such as relational

ORACLE Creating PeopleSoft Reports Using XML Publisher.doc

Source: http://www.oracle.com/technology/obe/obe_bi/xmlp_ps/index.html

databases that provide JDBC connections, XML feeds via HTTP, and Web services. BI Publisher speeds up template creation and report definition, and it provides a greater variety of template types and output formats (you can create templates using Excel to create Excel worksheets or Adobe Flex to create Flash output).