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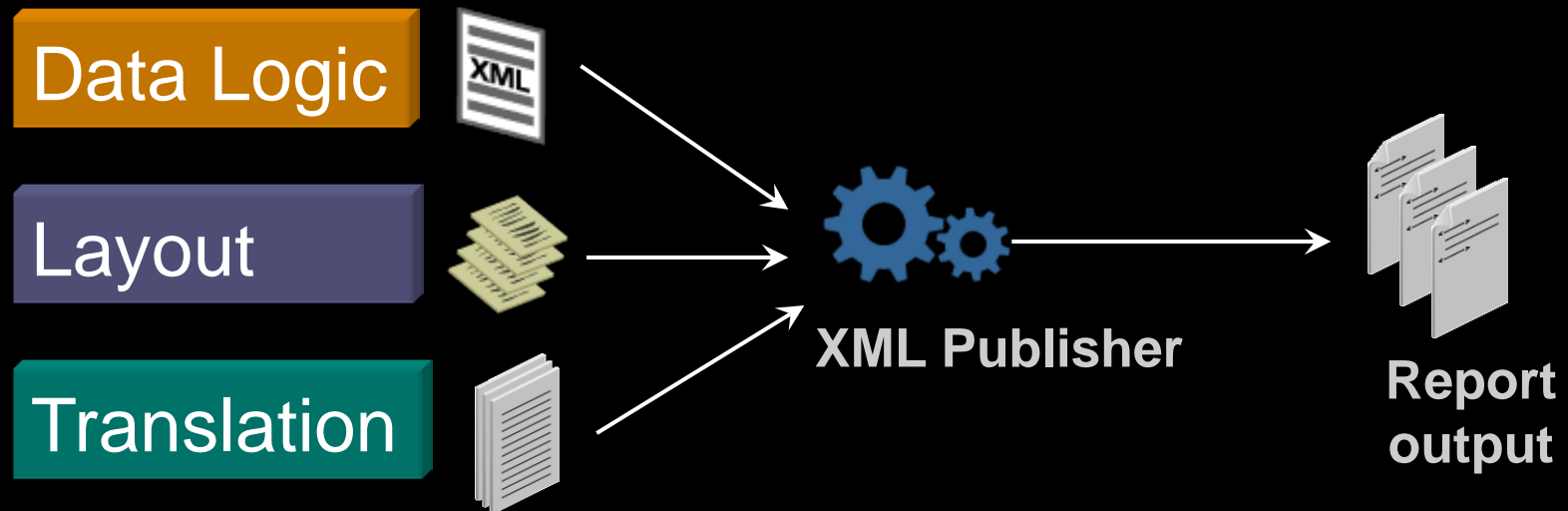
THE INFORMATION COMPANY

Oracle XML Publisher

Integration with PeopleTools

XML Publisher Concept

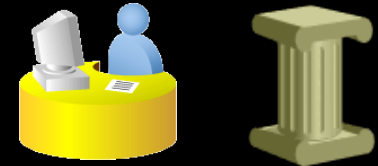
Separate data / layout / UI translation



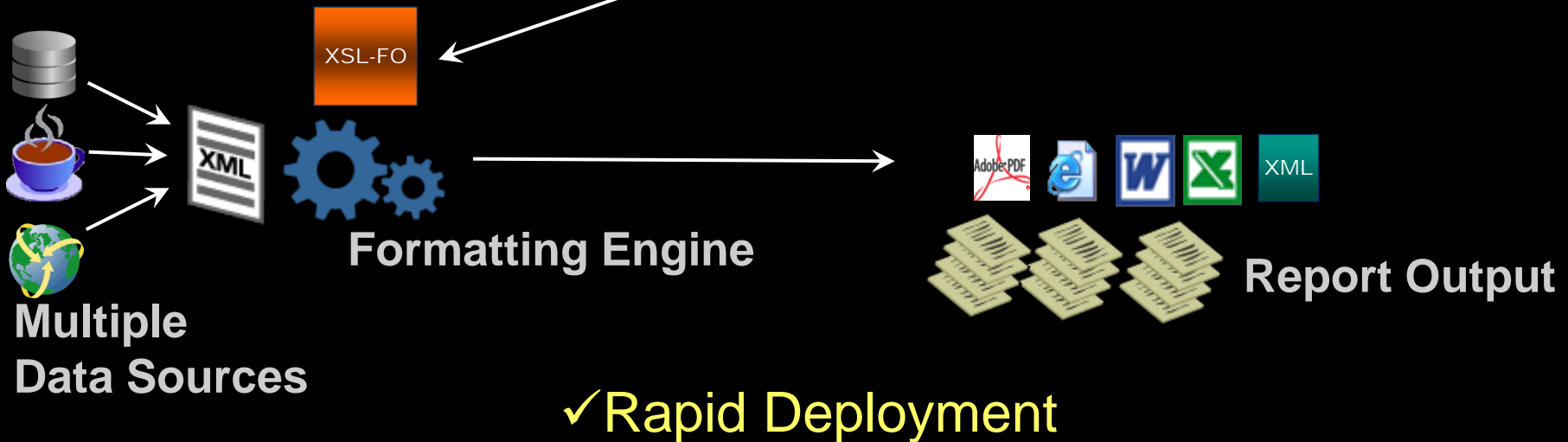
- ✓ Flexibility
- ✓ Reduced maintenance

XML Publisher Development

- Business consultants use familiar desktop tools for layout customization
- Support for Multiple Data Sources

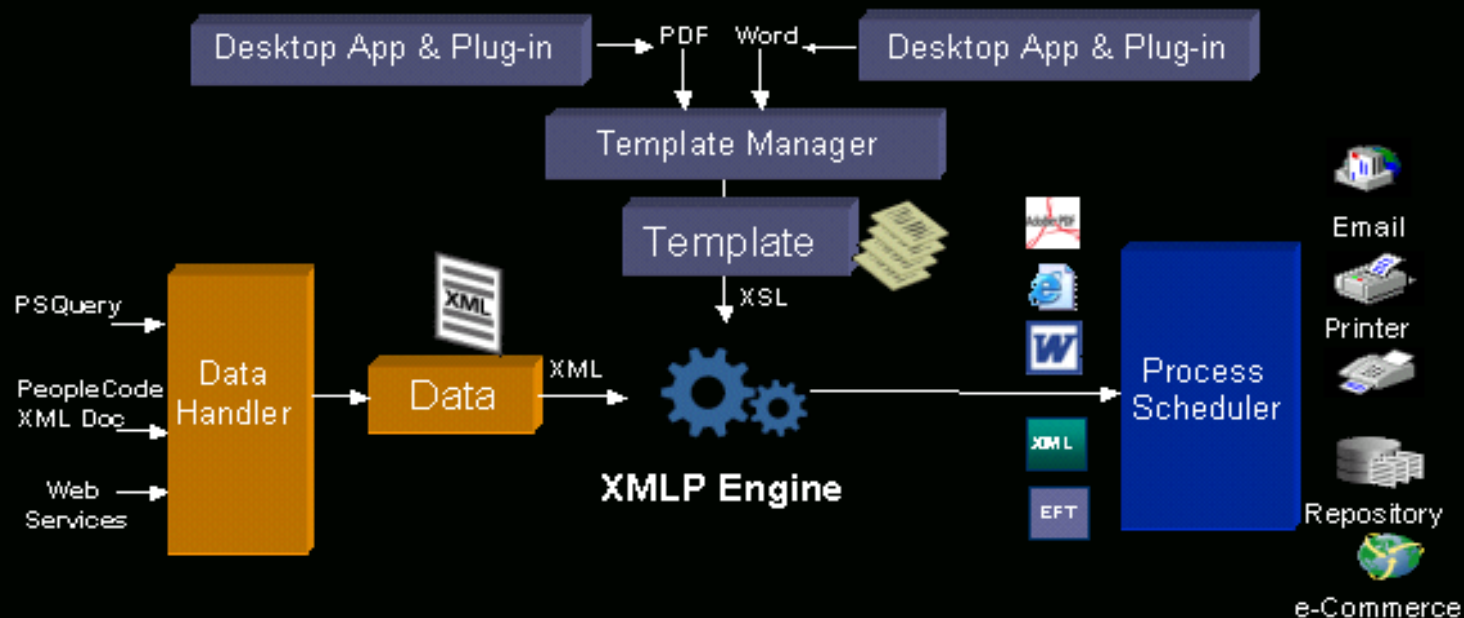


Report Templates



Integrated Solution

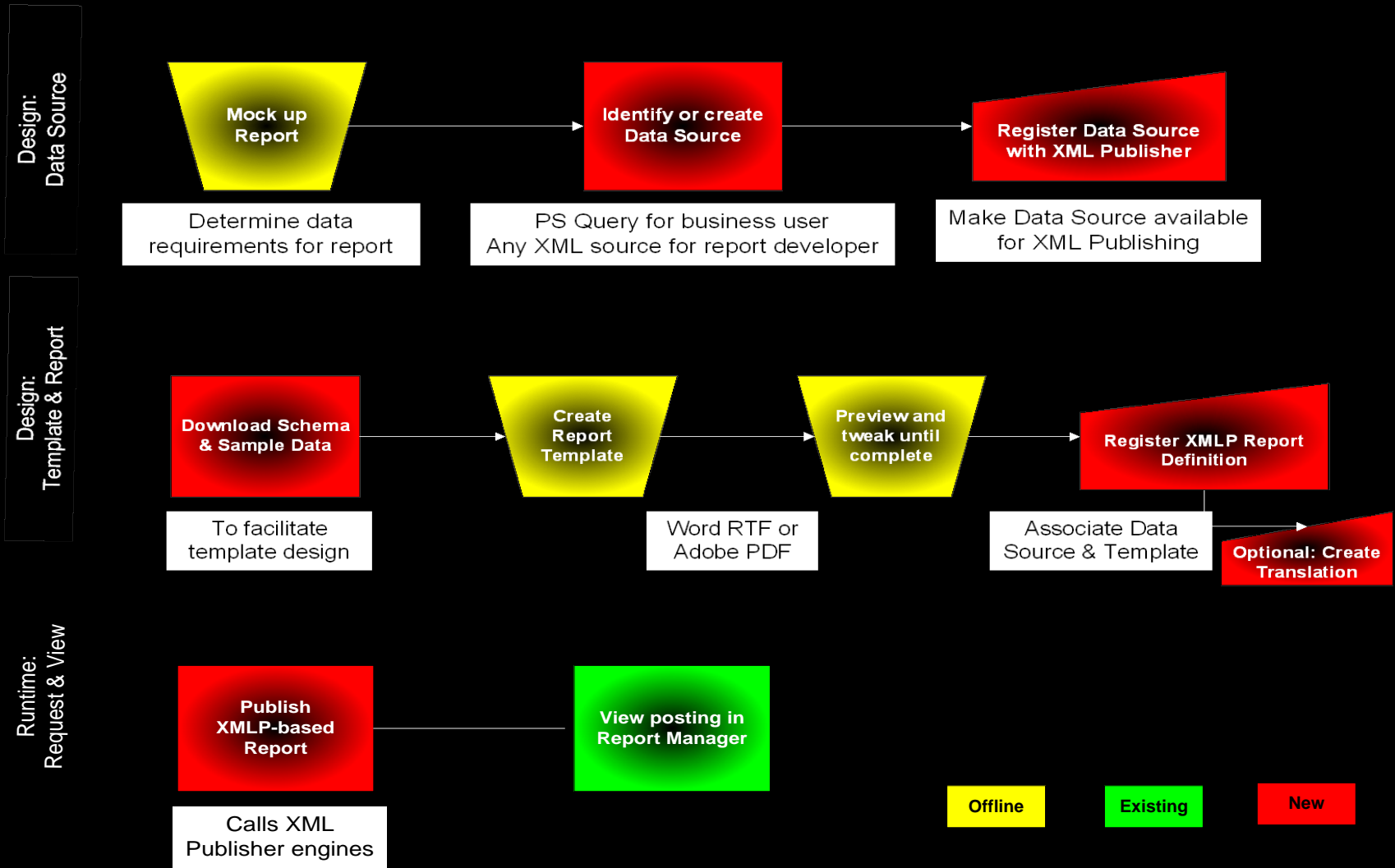
Tools XML Publisher Modules



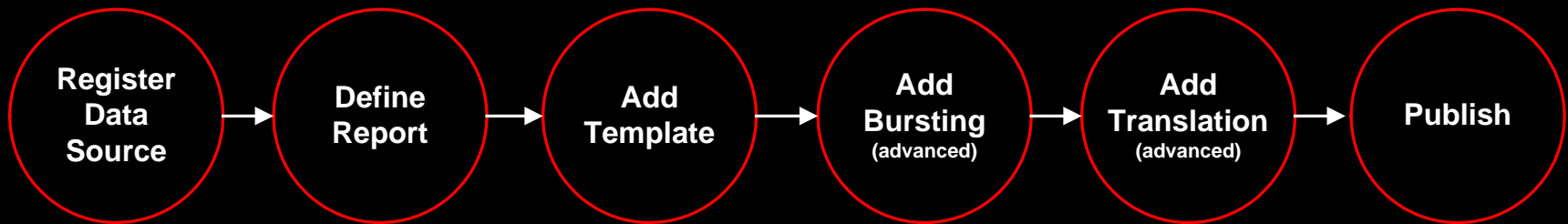
PeopleTools Integrated Solution

- Embedded XMLP Formatting Engine inside PeopleTools 8.48
- PeopleCode API for the Engine
- Data Source Manager
- Template Manager
- Report Manager
- PeopleCode API for Template Manager and Report Manager
- PIA pages for managing data sources, templates and reports

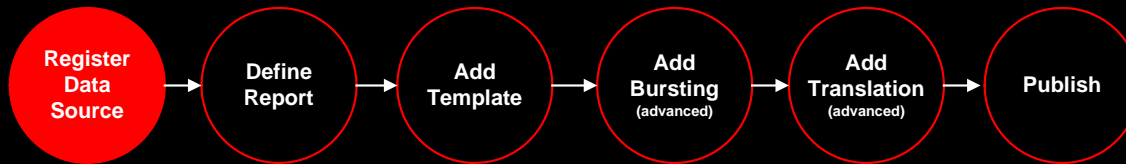
Business Process Flow



Simple online flow



Make a data source available for XMLP



Register Data Source

Source Type: **Object Owner ID:**

Data Source ID: OOW_CUST_BAL_LTR_PUB **Active**

Description:

Registered Date/Time: 09/13/05 9:49:22AM **Registered By:** VP1

Last Update Date/Time: 09/13/05 9:49:22AM **Updated By:** VP1

Related Files

| File Type | File | Last Update Date/Time | Generate File |
|------------------|--|-----------------------|--------------------------|
| Sample Data File | OOW_CUST_BAL_LTR_PUB.xml | 09/14/05 10:49:09AM | Generate |
| Schema File | OOW_CUST_BAL_LTR_PUB.xsd | 09/14/05 10:49:09AM | Generate |

Offline Template Design

- Create in either Word or Adobe Professional
- Template construction
 - Create a report or document in Word; save as RTF
 - Download a PDF-based form from government agency
- Download the Schema and Sample Data files from the Data Source that will supply the application specific values
- Using these XML files in conjunction with Word or Adobe Standard, insert and/or map form fields in the template to application data tags

In Adobe, map tags into PDF form template

U.S. Department of Justice
Immigration and Naturalization Service

OMB No. 1115-0136
Employment Eligibility Verification

Please read instructions carefully before completing this form. The instructions must be available during completion of this form. **ANTI-DISCRIMINATION NOTICE:** It is illegal to discriminate against work eligible individuals. Employers CANNOT specify which document(s) they will accept from an employee. The refusal to hire an individual because of a future expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Verification.

Print Name: Last First

Address (Street Name and Number)

City State

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

Employee's Signature

Preparer and/or Translator Certification.
other than the employee.) I attest, under penalty of perjury, that the information is true and correct.
Preparer's/Translator's Signature

Address (Street Name and Number, City, State, Zip Code)

Section 2. Employer Review and Verification. To be completed by the employer. To be completed by the employer to examine one document from List B and one from List C, as listed on the back of this form.

List A OR List B

Document title: _____

Issuing authority: _____

JavaScript Window

Fields

ADD1 = ADDRESS1

- query
 - row
 - ADDRESS1**
 - BAL_AMT
 - BUSINESS_UNIT
 - CITY
 - CURRENCY_CD
 - CUST_ID
 - DESCR
 - NAME1
 - POSTAL
 - STATE

Select Unselect

Close

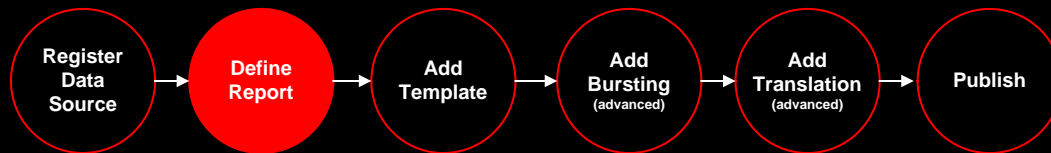
In Word, insert schema tags into RTF template form fields and preview design

Template Builder Toolbar

The screenshot shows the Microsoft Word interface with a letter template titled "Balance Letter Template RTF_rev2". The document content includes the Oracle logo, a date of May 23, 2004, recipient information for Classy Debtor Inc, and a salutation "Dear Sir/Madam:". A form field is present in the text "Re: Overdue Invoice # _____ Amount: BAL_AM". Two dialog boxes are open over the document:

- Text Form Field Options:** This dialog is used to configure the form field. It shows "Type" set to "Regular text" and "Default text" set to "BAL_AMT". The "Maximum length" is set to "Unlimited". There are also fields for "Run macro on" with "Entry" and "Exit" dropdowns.
- Form Field Help Text:** This dialog is used to define the help text for the form field. It has tabs for "Status Bar" and "Help Key (F1)". The "Type your own:" option is selected, and the text "<?BAL_AMT?>" is entered in the text area.

Define XML Publisher Report



Definition | Template | Output | Security

Report Name: OOW_1099S

Data Source

Data Source Type: PS Query

Data Source ID: OOW_1099S_PUBLIC

Data Source Description: Vendor 1099

Report Properties

Report Description:

***Report Status:**

***Report Category ID:** QE demo reports

Template Type: PDF Form Word RTF eText XSL

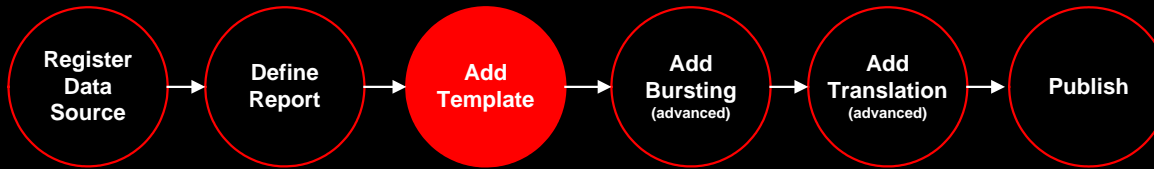
Archive Report Files: After Days On

Registered Date/Time: **Registered By:**

Updated Date/Time: **Updated By:**

Download: [Data Schema](#) [Sample Data](#)

Add template file to Report Definition



Definition | **Template** | Output | Security

Report Name: CUSTOMER_BALANCE_LETTER

Template Find | View All First 1 of 1 Last

Template ID: PRINT_ENGLISH Default Template + -

Locale Code: en

Description:

Channel:

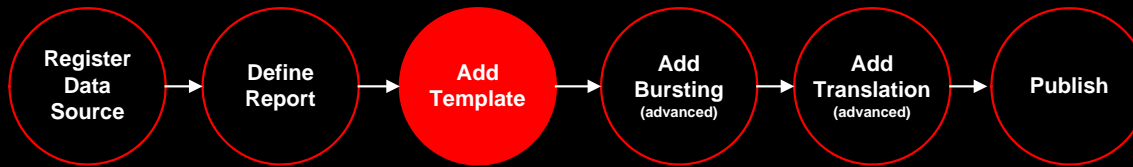
Template Files Find | View All First 1 of 10 Last

Effective Date: 06/01/2005 Version: 1 + -

Status:

Template File: Balance_Letter_Template_RTF.rtf

Output choices



Definition | **Template** | Output | Security

Report Name: CUSTOMER_BALANCE_LETTER

General

Report output may be edited

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 type="checkbox"/> | <input type="checkbox"/> |

Output Location

*Location: Any

Email

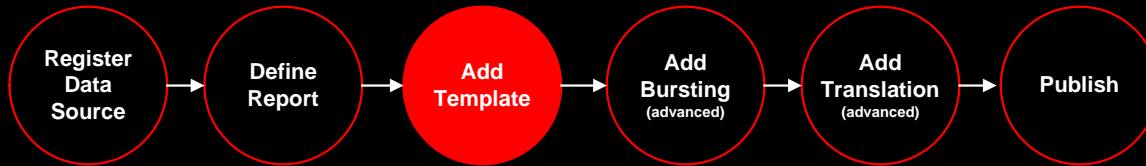
Allow recipient address entry at report runtime

Bursting

Generate separate report document files

Burst Field Name:

Viewer security



Definition | Template | Output | **Security**

Report Name: CUSTOMER_BALANCE_LETTER

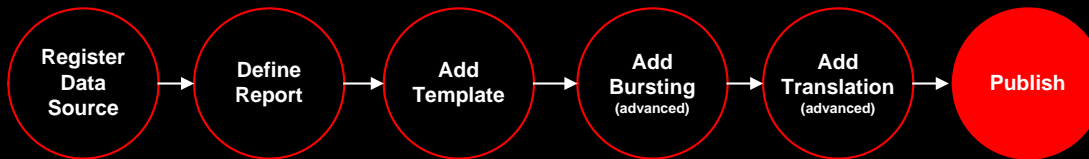
Report Viewers

Allow viewer ID assignment at report runtime

Web Report Repository/Email Viewers

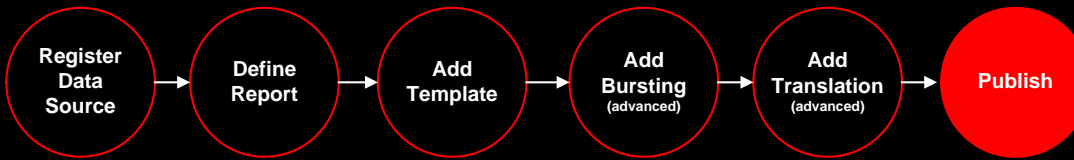
| ID Type | ID | Description |
|---------|-----|-------------|
| User | VP1 | Atamian,Wes |

Generating the report



- Developer creates process and Run Control page to connect data extraction process with XMLP report generation process
- For Query data sources, Business Power User utilizes the delivered Schedule Query Report page or the online Query Report Viewer

Process Scheduler publishes report to Report Manager



Schedule Query Report

Run Control ID: Letter [Report Manager](#) [Process Monitor](#)

*Report Name:

Description: Customer Balance Letter **Template Type:** RTF

Burst Field **Process Scheduler Request**

Data Language: **Run Control ID:** Letter

Server Name: **Run Date:**

Recurrence: **Run Time:**

Time Zone:

Process List

| Select | Description | Process Name | Process Type | *Type | *Format | Distribution |
|-------------------------------------|-------------------------------|--------------|------------------|-------|---------|------------------------------|
| <input checked="" type="checkbox"/> | Fusion Publisher Query Report | PSXPQRYRPT | Fusion Publisher | Web | PDF | Distribution |

Viewing the report results

Main Menu > Reporting Tools > Fusion XML Publisher

Fusion XML Pub

Welcome to Oracle's hottest new feature

 **Register Data Source**
Register existing processes
XML data to Fusion Publisher
[XML Data Source Registration](#)
[Define PS Query](#)
[Define Process](#)

 **Complete Set Up Tables**
Prepare your system for XML
[Report Category](#)
[Client Tool Download](#)



Vision Operations
5645 Main Street
Jacksonville, FL 32209
US

Dear Sirs/Madam,

According to our records as of 01-JAN-04, we show the following open balances.

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

| Invoice Number | Date | Trans Amount | Trans Amount Remaining |
|----------------|-----------|--------------|------------------------|
| 502444 | 06-DEC-03 | 19,125.00 | 19,125.00 |
| 502445 | 06-DEC-03 | 12,375.00 | 12,375.00 |
| 10019903 | 18-NOV-03 | 132,733.84 | 132,733.84 |
| 10020178 | 20-NOV-03 | 71,577.42 | 71,577.42 |
| 10020219 | 21-NOV-03 | 89,344.81 | 89,344.81 |
| 502394 | 22-NOV-03 | 11,250.00 | 11,250.00 |
| 10020280 | 24-NOV-03 | 128,654.98 | 128,654.98 |
| 10020310 | 25-NOV-03 | 120,653.20 | 120,653.20 |
| 10020319 | 26-NOV-03 | 147,328.21 | 147,328.21 |
| 234 | 02-DEC-03 | 53.35 | 53.35 |
| 10020402 | 04-DEC-03 | 146,776.07 | 146,776.07 |
| 10020403 | 04-DEC-03 | 172,482.45 | 172,482.45 |
| 10020404 | 04-DEC-03 | 147,740.25 | 147,740.25 |
| 10020405 | 04-DEC-03 | 71,577.42 | 71,577.42 |
| 10020406 | 04-DEC-03 | 89,344.81 | 89,344.81 |

Private and Confidential

Advanced Options

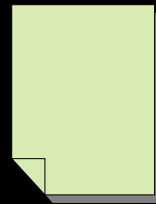
**Bursting
Content Library
Translation**

Bursting – separate report files

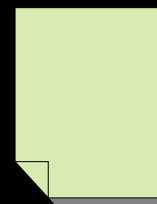
Use for security &
for distribution

```
<PayChecks>  
  <PayCheck>  
    <Empld>1000</Empld>  
    <DeptId>01</DeptId>  
    <Salary>1000</Salary>  
  </PayCheck>  
  <PayCheck>  
    <Empld>1001</Empld>  
    <DeptId>01</DeptId>  
    <Salary>1000</Salary>  
  </PayCheck>  
  <PayCheck>  
    <Empld>1002</Empld>  
    <DeptId>02</DeptId>  
    <Salary>1000</Salary>  
  </PayCheck>  
</PayChecks>
```

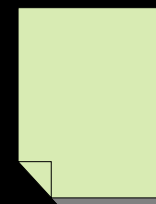
Bursting by Empld



Empld: 1000

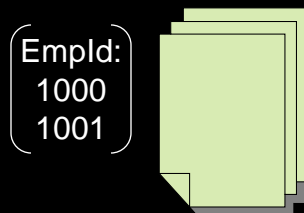


Empld: 1001

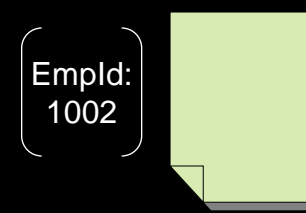


Empld: 1002

Bursting by DeptId



DeptId: 01



DeptId: 02

Bursting provides multiple features ^{optional}

Definition Template Output Security **Bursting**

Report Name: MENU_DESCR

Bursting

Burst Field Name: PORTAL_PRNTOBJNA

Template

Template Control Field: PORTAL_PRNTOBJNA

Template Application Criteria

| Field Value | Template ID | Language | | |
|------------------------|--------------|----------|---|---|
| PASSWORD_CONFIGURATION | MENU_DESCR_1 | Spanish | + | - |
| PT_XMLPUBLISHER | MENU_DESCR_1 | French | + | - |

Burst security

Security Join Table: PSOPRALIAS

Security Field Name: OPRID

Security ID Type: UserID

Field Mapping

| Security Join Table Field Name | Data Source Field Name | | |
|--------------------------------|------------------------|---|---|
| OPRID | OPRID | + | - |

Search Keys

Search Field Name

PORTAL_LABEL

PORTAL_NAME

Save Add Return to Search

- << Data attribute to burst by
- << Template or translation for each burst file assigned at runtime per defined data value
- << Report file security assigned at runtime per application's existing row level security data
- << Search key data values stored at runtime for more intelligent search

Content Library

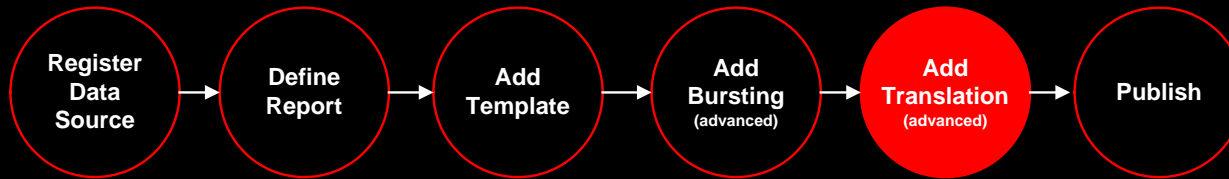
- Content library is a sub-template within a primary template: either text or image, can be used as page header, footer, legal clause or company logo
- Syntax in primary template:
 - `<?import:psxmlp://SUBTEMPLATE?>`
 - `<?call-template:"header"?>`
- Content in a sub-template is translatable

The screenshot displays a web-based interface for managing content library sub-templates. At the top, there is a tab labeled "Content Library". Below it, a form is used to define a sub-template. The form includes the following fields and controls:

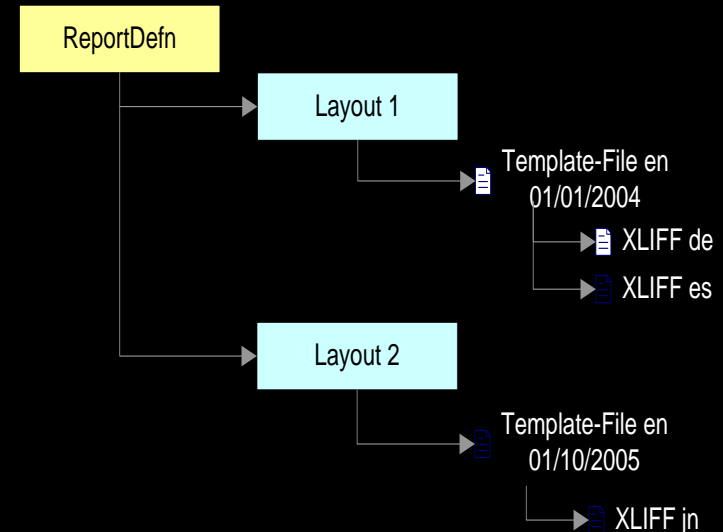
- *Sub-Template Id:** A text input field containing "SAMPLE_SUBTEMPLATE".
- Sub-Template:** A section containing:
 - Description:** A text input field containing "Oracle basics".
 - Language Code:** A dropdown menu currently set to "English".
 - Report Category ID:** A text input field containing "PEOPLETOOLS" with a search icon to its right.
 - *Sub-Template Type:** A dropdown menu currently set to "RTF".
- Template Files:** A section with a header bar containing "Find | View All | First 1 of 1 Last". Below this, there are:
 - *Effective Date:** A date input field showing "10/01/2005" with a calendar icon and plus/minus buttons.
 - Status:** A dropdown menu currently set to "Active".
 - Template File:** A text input field containing "subT_MGS.rtf".
 - Two buttons: "Upload" and "Download".

At the bottom of the form, there are two buttons: "Save" and "Return to Search".

Translations



- Label is extracted using the engine function and saved in an XLIFF
- Download XLIFF file
- Have translation service translate XLIFF



Example XLIFF file for translation

- Note source and target locale and translation units

```
Address C:\user\XML_Publisher\Tests\JY_TEST_40_en_US.xlf Go

<?xml version="1.0" encoding="utf-8" ?>
- <xliff version="1.0">
- <file source-language="en-US" target-language="fr-FR" datatype="XDO" original="orphen.rtf"
  product-version="orphen.xlf" product-name="">
  <header />
  - <body>
  - <trans-unit id="4d3eb24" maxbytes="4000" maxwidth="15" size-unit="char"
    translate="yes">
    <source>Total</source>
    <target>Total</target>
    <note>Text located: body/table</note>
  </trans-unit>
  - <trans-unit id="a2bad3c3" maxbytes="4000" maxwidth="22" size-unit="char"
    translate="yes">
    <source>Seq Name/</source>
    <target>Seq Name/</target>
    <note>Text located: body/table/table header</note>
  </trans-unit>
  - <trans-unit id="59c932c3" maxbytes="4000" maxwidth="57" size-unit="char"
    translate="yes">
```

XLIFF files related to Report Template

Template Translations

| | | | |
|--------------------|-----------------------|-----------------------|---------------------|
| Source Type | PS Query | Data Source ID | MESSAGES_FOR_MSGSET |
| Report Name | MAIN_SUB | Template ID | MAIN_SUB_1 |
| Description | Colored w/SubTemplate | Language Code | English |

Scroll Area [Find](#) | [View All](#) First 1 of 3 Last

Template File main_with_sub_noQuotes_repeat[1].rtf

Effective Date 11/10/2005

[Generate New Translation File](#)

[Add Translated File](#)


Translation Files

[Customize](#) | [Find](#) | First 1-2 of 2 Last

| <u>Active</u> | <u>Translation File</u> | <u>Language</u> | <u>Preview</u> | <u>Upload</u> | |
|-------------------------------------|---|-----------------|-------------------------|------------------------|------------------------|
| <input checked="" type="checkbox"/> | main_with_sub_repeat[1110_esp].xlf | Spanish | Preview | Browse | Delete |
| <input checked="" type="checkbox"/> | main_with_sub_noQuotes_repeat[1110_2].xlf | French | Preview | Browse | Delete |


Report Manager – enhanced search

Fusion Report Repository Search [Report Manager](#) [Process Monitor](#)

Report Definition ID:  Menu Item Descriptions

Created On: or **Last**

| Search For | Value |
|--|--|
| PORTAL_PRNTOBJNAME | <input type="text" value="contains"/> <input type="text" value="PERFORM"/> |
| <input type="text" value="PORTAL_NAME"/> | <input type="text" value="Begins with"/> <input type="text" value="EMPLOYEE"/> |
| <input type="text"/> | <input type="text" value="Begins with"/> <input type="text"/> |

| Reports | | | | | | | Customize | Find | View All |  | First | 1 of 1 | Last |
|------------------------|--|-------------|----------------------|-----------------|-----------|---------------|---------------------------|----------------------|--------------------------|---|-------|--------|------|
| Report | Report Description | Folder Name | Completion Date/Time | Expiration Date | Report ID | Prcs Instance | | | | | | | |
| 1 XMLP | MENU_DESCR [PERFORMANCE_] MENU ITEM DESCRIPTIONS | GENERAL | 11/29/05 5:54PM | 12/31/2006 | 84 | 135 | | | | | | | |

- Search for report by the report's defined search keys to locate one specific bursted report file
- Reports secured for a user or role

Real life goal is reducing IT dependency

- For ad hoc reports and documents
 - Business users can use Query as data source and design their own ad hoc reports and documents
- For production reports and forms
 - Developers supply XML data extraction program from any source and the initial template designs
 - Business users can tweak the template layouts as needed
 - New form versions only require user to map data elements into the new template form; no coding required

Help for report developers

- Registration, storage and management of report definitions and related files
- Schema generator utility for xsd files
- API's, application classes, and PeopleCode examples to facilitate incorporation of XML Publisher reporting function onto application pages and run controls
- Managed Object support to facilitate movement of new reports from development to production

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