

UNT

HEALTHTM SCIENCE CENTER



BI Publisher for the Registrar's Office

Session #2002

July 23, 2014

Your Presenters

- **Emily Rhodes**
 - Enrollment Services Assistant
 - 2 ½ years at the university
 - Master's in Library and Information Science
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 - Executive Director of Enrollment Services & Registrar
 - 9 years at the university
 - M.B.A

About the UNT Health Science Center

Approximately 2400 graduate and professional students

- Medicine
- Physician Assistant
- Physical Therapy
- Public Health
- Pharmacy
- Biomedical Sciences

PeopleSoft Campus Solutions 9.0

- Tools 8.52.15 (going to 8.53 soon)
- Bundle 33

Presentation Overview

- Getting the Add-In
- How to use the Word Add-in:
 - Basics about the Add-in
 - Variable vs. Non-Variable Data
 - Previewing the Data
 - Knowing the Query
 - Creating Tables & Sorting
 - Some Advanced Tips
- Implementation of Template into PeopleSoft
- BI Publisher in the Registrar's Office

History of Our Implementation

- Previously used Crystal Reports for Schedule of Classes (SOC)
- Needed a new way to create the SOC
- Wanted new process to be 'easier' to run
- After using BI Publisher for the SOC, we started using it for other reports:
 - Enrollment Verifications
 - Board Score Verifications (Medical Students)
 - Permission Numbers

Final Product Using BI Publisher

UNT HEALTH SCIENCE CENTER
 Last updated: 07/30/2012
Fall 2012 Schedule of Classes

Note: When registering for classes, use the four-digit class number in parentheses.

(1) Regular Academic Session
 8/20/2012 - 12/7/2012
 Payment Due Date: 8/19/2012

[Click here to Use the myHSC Class Search to view class details, including Textbook Information.](#)

Class #	Section	Cr Hrs	Days	Time	Location	Instructor
BACH/Behavioral and Community Health						
BACH 5000 MPH Comprehensive Exam						
(6740)	001	0.00				Cannell M
CONTACT DEPARTMENT FOR PERMISSION NUMBER						
BACH 5300 Theor Found of Ind & Comm Hlth						
(6688)	001	3.00	M	6:00 - 9:00PM	EAD 703	Cannell M
BACH 5310 Community Assessment						
(6689)	001	3.00	T	9:00 - 12:00PM	EAD 719	Paul M
BACH 5312 Community Program Planning						
(6690)	001	3.00	M	3:00 - 6:00PM	EAD 719	Moayad N
BACH 5314 Soc Behav Res Methods						
(6691)	001	3.00	W	9:00 - 12:00PM		Ramisetty-Mikler S
BACH 5316 Comm Prog Evaluation Interven						
(6692)	001	3.00	Th	6:00 - 9:00PM	EAD 524	Staff
BACH 5335 Mental Illness						
(6693)	001	3.00	Th	6:00 - 9:00PM	EAD 703	Thomas D

UNT HEALTH SCIENCE CENTER
 Last Updated on: 6/25/2014
Spring 2014 Schedule of Classes

Note: When registering for classes, use the four-digit class number in parentheses.

(1) Regular Academic Session
 1/6/2014 - 5/2/2014
 Payment Due Date: 1/5/2014

[Click here to use the myHSC Class Search to view class details, including textbook information](#)

Class #	Section	Cr Hrs	Days	Time	Location	Instructor
BACH/Behavioral and Community Hlth						
BACH 5001 MPH Comprehensive Exam						
(2198)	001	0.00				Cannell M
CONTACT DEPARTMENT FOR PERMISSION NUMBER						
BACH 5297 Practice Exp in Public Health						
(2207)	001	1.50				Adrignola M
CONTACT DEPARTMENT FOR PERMISSION NUMBER						
This is only for students who entered Fall 2013 and after.						
BACH 5310 Part Approach to Imp Comm Hlth						
(2200)	001	3.00	M	12:00pm-03:00pm	EAD 703	Paul M
This is cross-listed with BACH 5345						
BACH 5312 Comm Assessmnt & Prog Planning						
(2201)	001	3.00	W	12:00pm-03:00pm	EAD 703	Moayad N
This course is cross-listed with BACH 5340.						
BACH 5313 Intro to Data Mgmt & Stat Comp						
(3339)	001	3.00	Th	03:00pm-06:00pm		Cannell M
This course is cross-listed with EPID 5313 & BIOS 5314 and meets in LUR						

Purpose and Aim

We will create a rich text format (RTF) file in Microsoft Word using an 'Add-In' that will integrate data from an PeopleSoft query (downloaded as an XML file) to produce a report that has a formatting that is completely customizable.

In other words:
Let's make our data pretty!

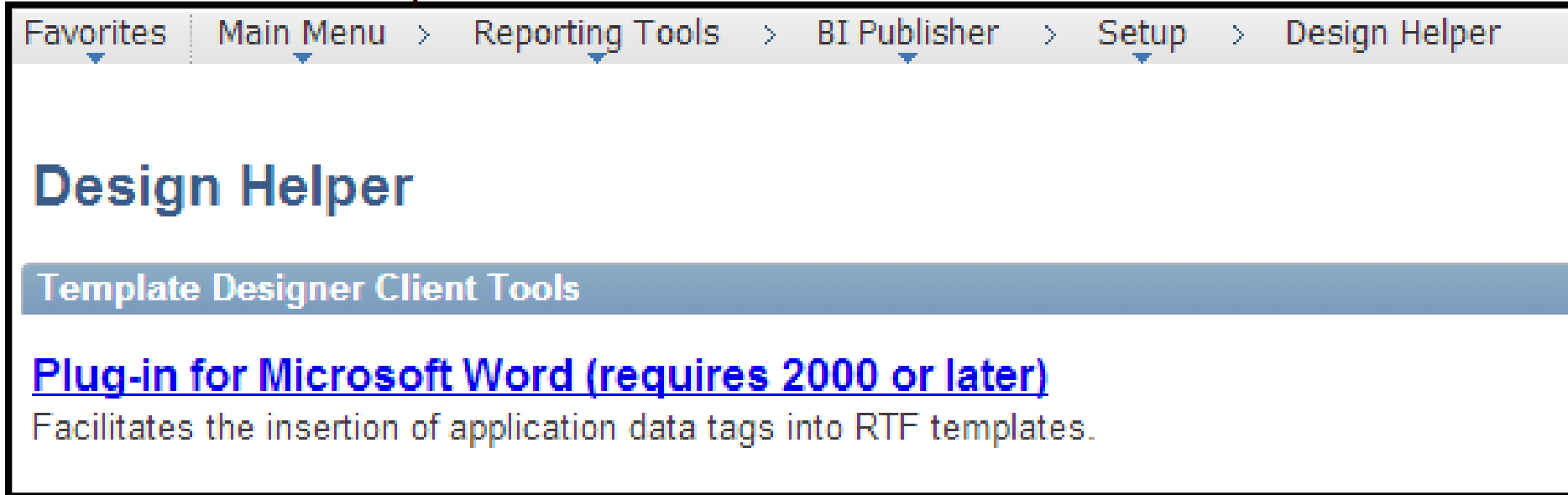
Getting Started

What you need:

- Microsoft Word (2013 version works fine, screenshots are from 2010)
- Oracle BI Publisher Word **Add-In**
- Data from a query in PeopleSoft, saved as an **XML file**


Downloading the BI Publisher Add-In

Location in PeopleSoft and Link for download:



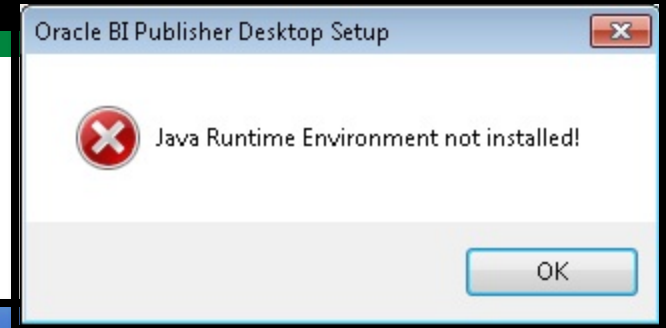
The screenshot shows a navigation menu with the following items: Favorites, Main Menu, Reporting Tools, BI Publisher, Setup, and Design Helper. Below the menu, the text "Design Helper" is displayed in a large blue font. Underneath, there is a blue bar with the text "Template Designer Client Tools". Below this bar, the text "Plug-in for Microsoft Word (requires 2000 or later)" is displayed in a blue font, followed by the description "Facilitates the insertion of application data tags into RTF templates."

Downloaded File – Click for installation process:

Name	Type	Size
 BIPublisherDesktop	Application	127,039 KB

No Java?

If you don't have Java installed, you won't be able to run the program to get BI Publisher Desktop installed. Install if needed.



Download Free Java Software

Oracle Corporation [US] <https://www.java.com/en/download/>

Java™

Download Help

All Java Downloads

If you want to download Java for another computer or Operating System, click the link below.

[All Java Downloads](#)

Report an issue

Why am I always redirected to this page when visiting a page with a Java app?

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» [Report an issue](#)

Free Java Download

Download Java for your desktop computer now!

Version 7 Update 60

[Free Java Download](#)

» [What is Java?](#) » [Do I have Java?](#) » [Need Help?](#)

Why download Java?

Java technology allows you to work and play in a secure computing environment. Upgrading to the latest

Microsoft Word Add-In

You should now see the Add-Ins tab in Word.



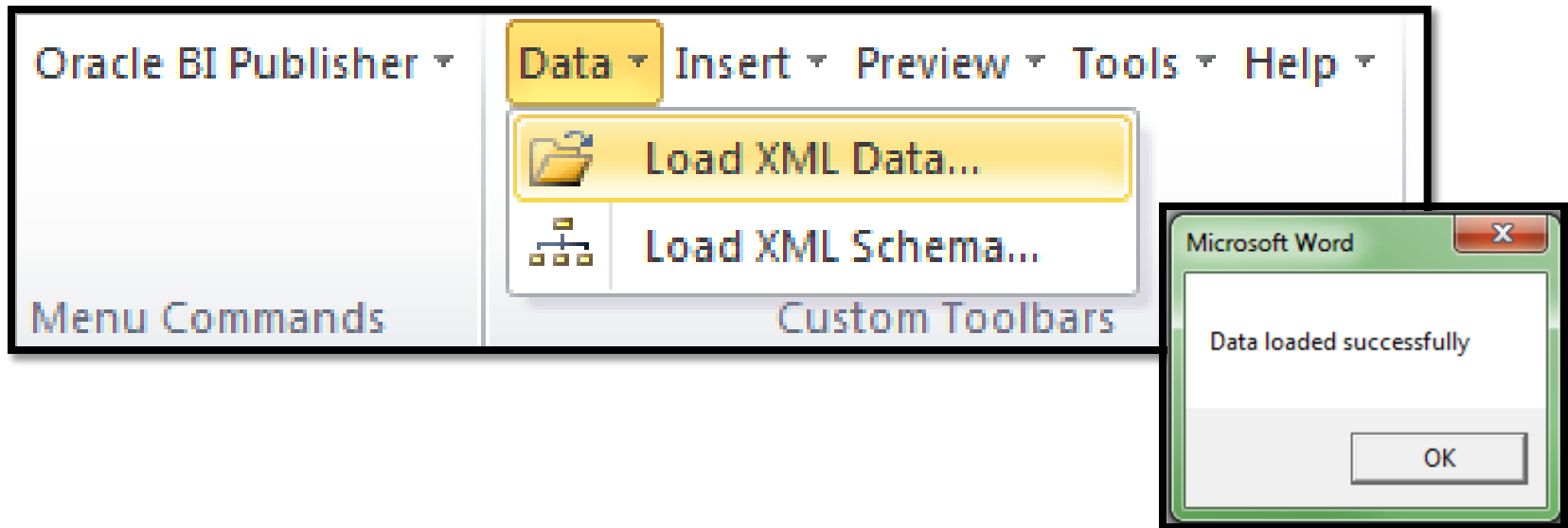
Getting the Data

Download your data as an XML file. Our example template will be our schedule of classes (SOC).

Query									
Select	Query Name	Descr	Owner	Folder	Edit	Run to HTML	Run to Excel	Run to XML	Schedule
<input type="checkbox"/>	HSSR_SOC_FOR_PUBLISH	Schedule of Classes	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	HSSR_SOC_FOR_PUBLISH_BY_SUBJ	Schedule of Classes by Subject	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	HSSR_SOC_FOR_PUBLISH_BY_TERM	Schedule of Classes by Term	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	HSSR_SOC_FOR_PUBLISH_MEDS	MEDS Schedule of Classes	Public		Edit	HTML	Excel	XML	Schedule
<input type="checkbox"/>	HSSR_SOC_FOR_PUBLISH_W_BOOKS	Schedule of Classes w Textbook	Public		Edit	HTML	Excel	XML	Schedule

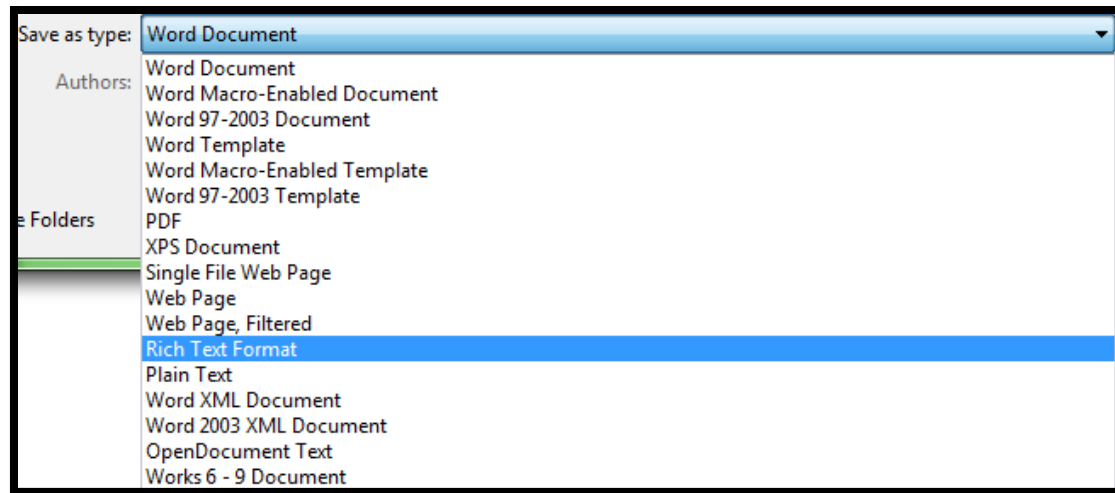
Upload XML file to Add-In

- Add-Ins > Data > Load XML Data...
- Select the XML file downloaded from PeopleSoft



Don't forget to save!

- Save the Word file as a .RTF (rich text format)



- Every time you re-open the file, you will need to load the data source.

Basics about the Add-In

Parts of the RTF file:

- **Permanent** – text, graphics, etc.
- **Variable** – data from the query (XML download)
- **Grouping Codes** – indicate how data is grouped

Examples:

- **Permanent** - UNTHSC logo and the words "Schedule of Classes"
- **Variable** – List of available courses

Basics about the Add-In

Blue – Permanent parts of an RTF.

Red – Variable portions of RTF. Usually has a grey background.

Yellow – Information that indicates how the information will be grouped (more on this later).

The image shows a document header and a table structure. The header includes the UNT Health Science Center logo and the text "Last Updated on: 6/25/2014". Below the header is the title "G.DESCR Schedule of Classes". A note below the title reads: "Note: When registering for classes, use the four-digit class number in parentheses." Below the note is a table with a green background. The table has two columns: "A.SESSION_CODE" and "K.SESSION_DESCR". The text "group row by A.SESSION_CODE" is written in blue above the first column. The entire document content is enclosed in a black border.

UNT HEALTH SCIENCE CENTER

Last Updated on: 6/25/2014

G.DESCR Schedule of Classes

Note: When registering for classes, use the four-digit class number in parentheses.

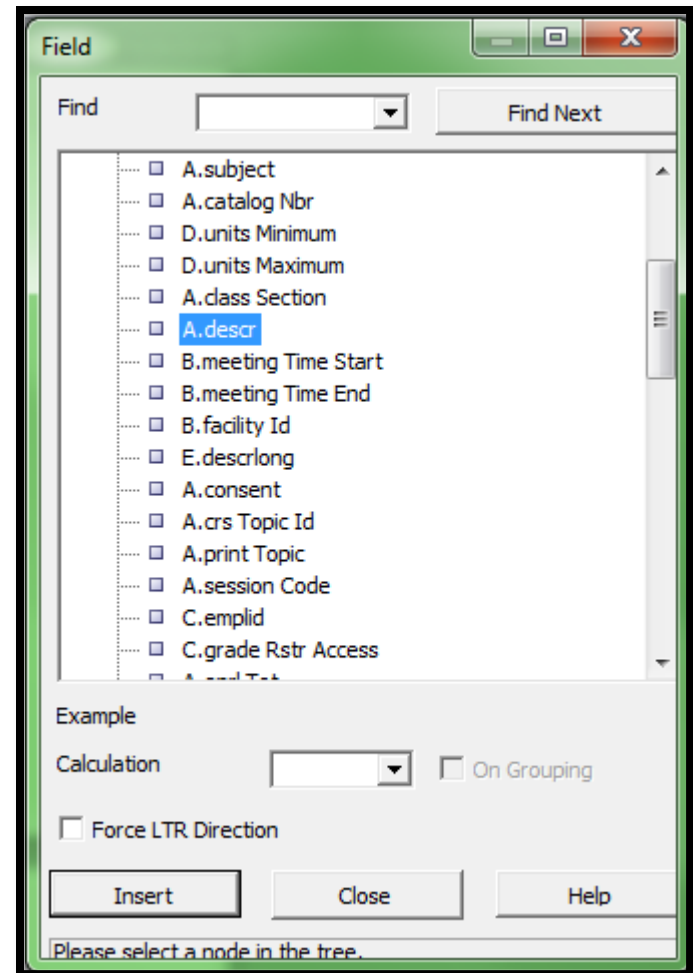
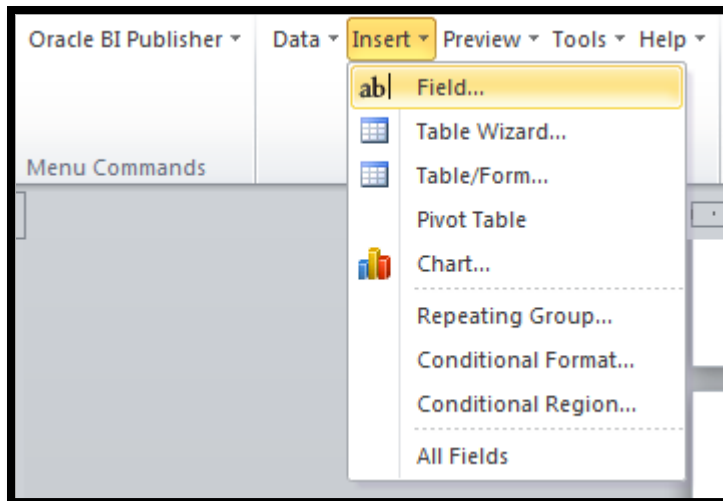
group row by A.SESSION_CODE

A.SESSION_CODE	K.SESSION_DESCR
----------------	-----------------

Basics about the Add-In: Variable Data

You can insert a variable piece of data from the XML report into the RTF file.

Insert > Field > select field >
Click Insert



Basics about the Add-In: Variable Data

This is the variable piece of data that we just inserted into the Word document.*

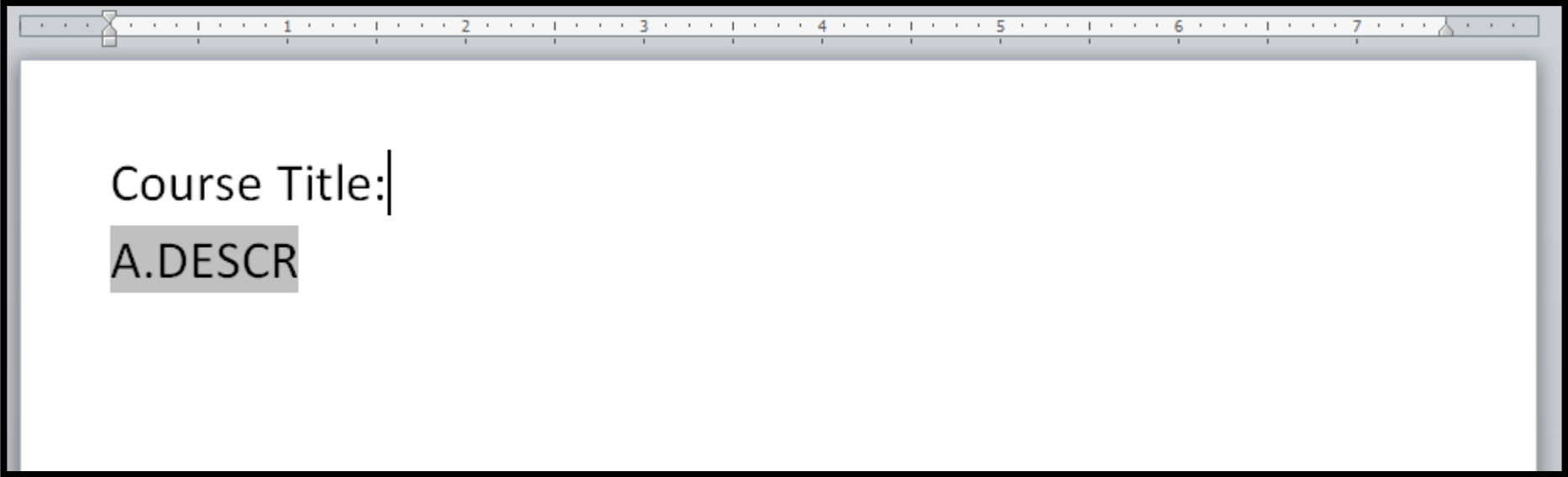
A screenshot of a Microsoft Word document window. The window has a title bar at the top with a ruler showing numbers 1 through 7. The main content area is white and contains a single line of text, "A.DESCR", which is highlighted with a gray background. A vertical cursor line is positioned to the right of the text.

A.DESCR |

*Even though it has a grayed out background, we can still change the size, color, etc. As is, it is unformatted.

Basics about the Add-In: Variable Data

Let's add some regular text in with this variable data.

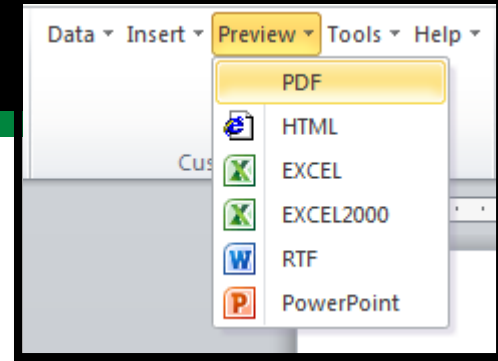


Course Title:|

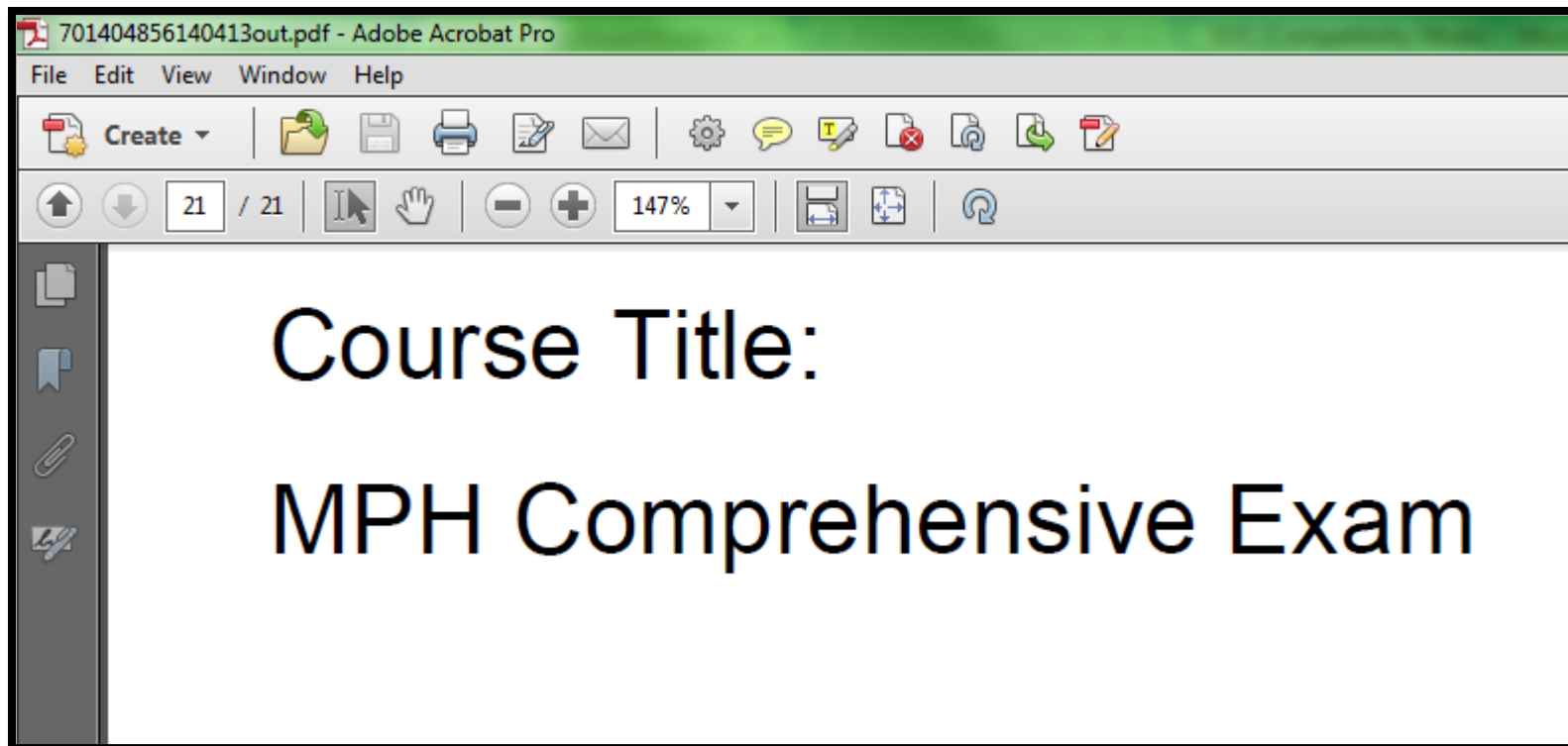
A.DESCR

Basics about the Add-In: Preview the Data

To preview the data, click Preview > PDF.



Preview: A.DESCR = 'MPH Comprehensive Exam'



Basics about the Add-In: Know your query and data!

QUESTION: The query we have has multiple rows of data. Why did it only **list the one course** (MPH Comprehensive Exam)?

Basics about the Add-In: Know your query and data!

ANSWER: When you insert a single field, it looks at the top row of data only. If you want to list all rows, use the Table Wizard (we'll discuss this later).

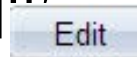
D	E	F	G	H	I	J
Nbr	Min Units	Max Units	Sect	Course Title	Start Time	End Time
1	0.00	0.00	001	MPH Comprehensive Exam		
7	1.50	1.50	001	Practice Exp in Public Health		
0	3.00	3.00	DL01	Theor Found of Ind & Comm Hlth		
0	3.00	3.00	DL01	Theor Found of Ind & Comm Hlth		
0	3.00	3.00	001	Pract Approach to Imp Comm Hlth	12:00:00 PM	3:00:00 PM
2	3.00	3.00	001	Comm Assessmnt & Prog Planning	12:00:00 PM	3:00:00 PM
3	3.00	3.00	001	Intro to Data Mgmt & Eval Comm	3:00:00 PM	6:00:00 PM
6	3.00	3.00	001	Comm Prog Evaluation Interact	9:00:00 AM	12:00:00 PM
1	3.00	3.00	DL01	Injury Violence Prevention		

Basics about the Add-In: Know your query and data!

QUESTION: The Excel version of the query has a column name of 'Course Title'. But in the Add-in, we used **A.DESCR**. Why are these different?

Basics about the Add-In: Know your query and data!

ANSWER: In Query Manger in PeopleSoft, go to the Fields tab. From here you can click on one of the 'Edit' buttons.



Heading Text: Course Title
Unique Field Name: A.DESCR

You can edit the Unique Field Name to be more clear if needed (do this BEFORE creating the RTF!)

The image shows a screenshot of the "Edit Field Properties" dialog box in PeopleSoft. The dialog has a title bar "Edit Field Properties" and a subtitle "Field Name: A.DESCR - Description". It is divided into two main sections: "Heading" and "Aggregate".

Heading Section:

- Four radio buttons: "No Heading", "Text" (selected), "RFT Short", and "RFT Long".
- A text input field for "Heading Text:" containing "Course Title".
- A text input field for "*Unique Field Name:" containing "A.DESCR".

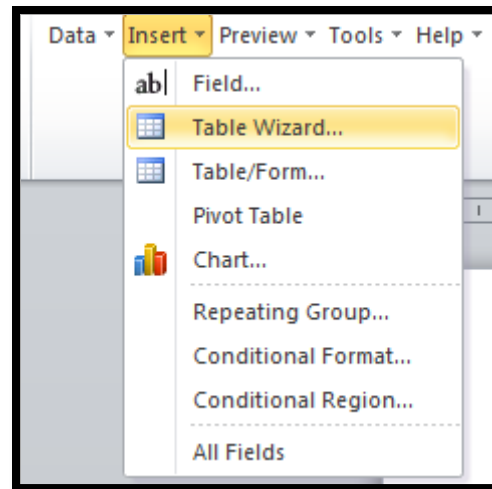
Aggregate Section:

- Five radio buttons: "None" (selected), "Sum", "Count", "Min", "Max", and "Average".

At the bottom of the dialog are "OK" and "Cancel" buttons.

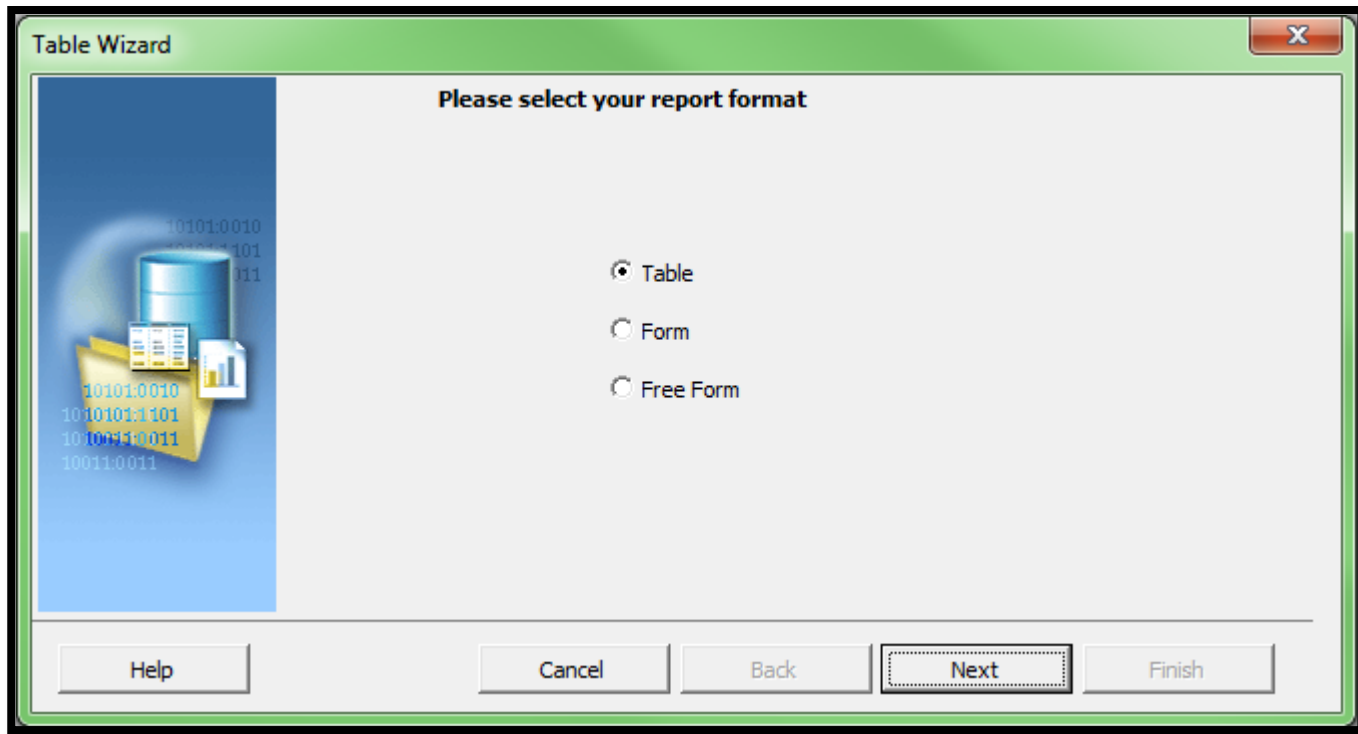
Creating Tables and Sorting: Table Wizard

The easiest way to display all rows of data is to use the 'Table Wizard'.



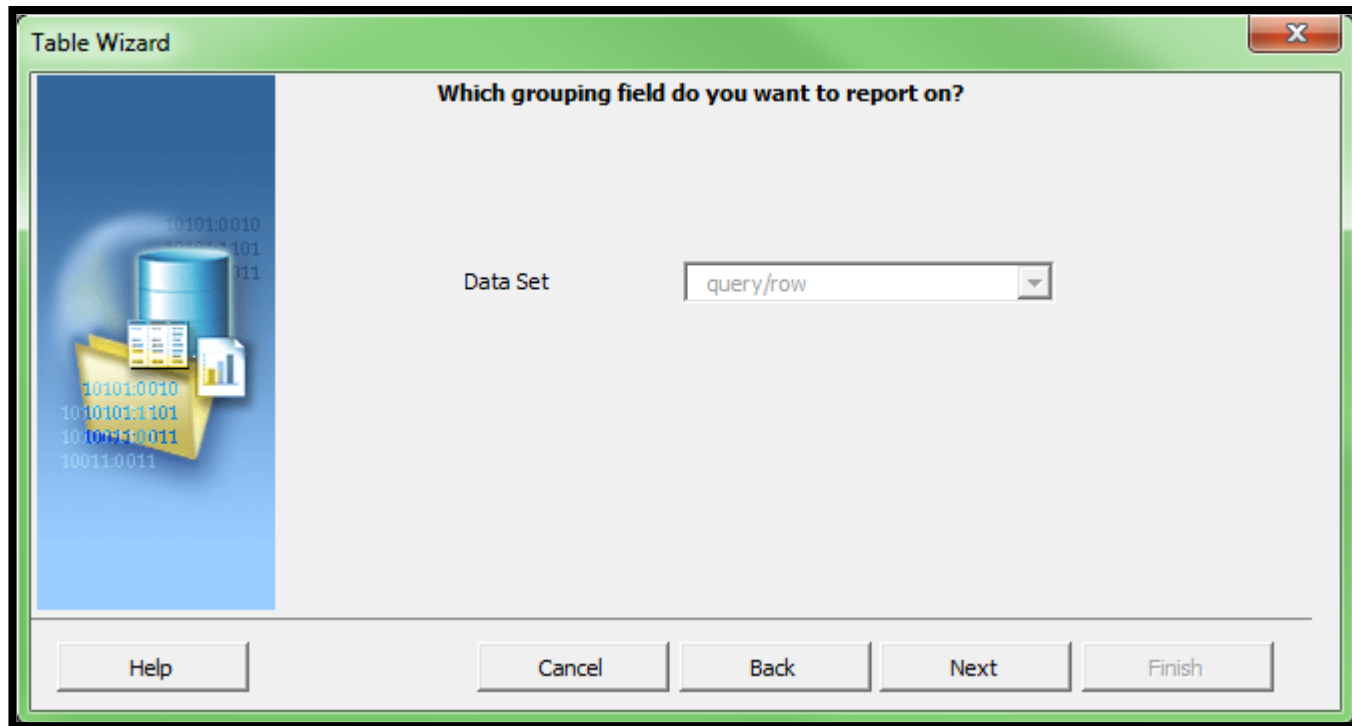
Insert > Table Wizard...

Creating Tables and Sorting: Table Wizard



Click Next.

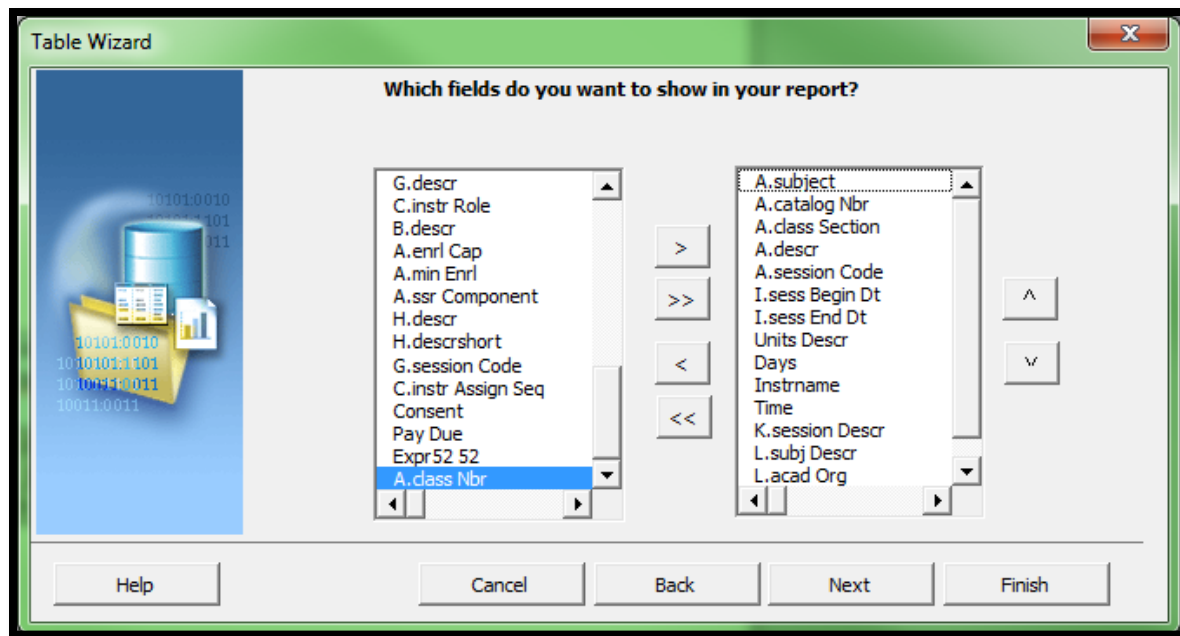
Creating Tables and Sorting: Table Wizard



Click Next.

Creating Tables and Sorting: Table Wizard

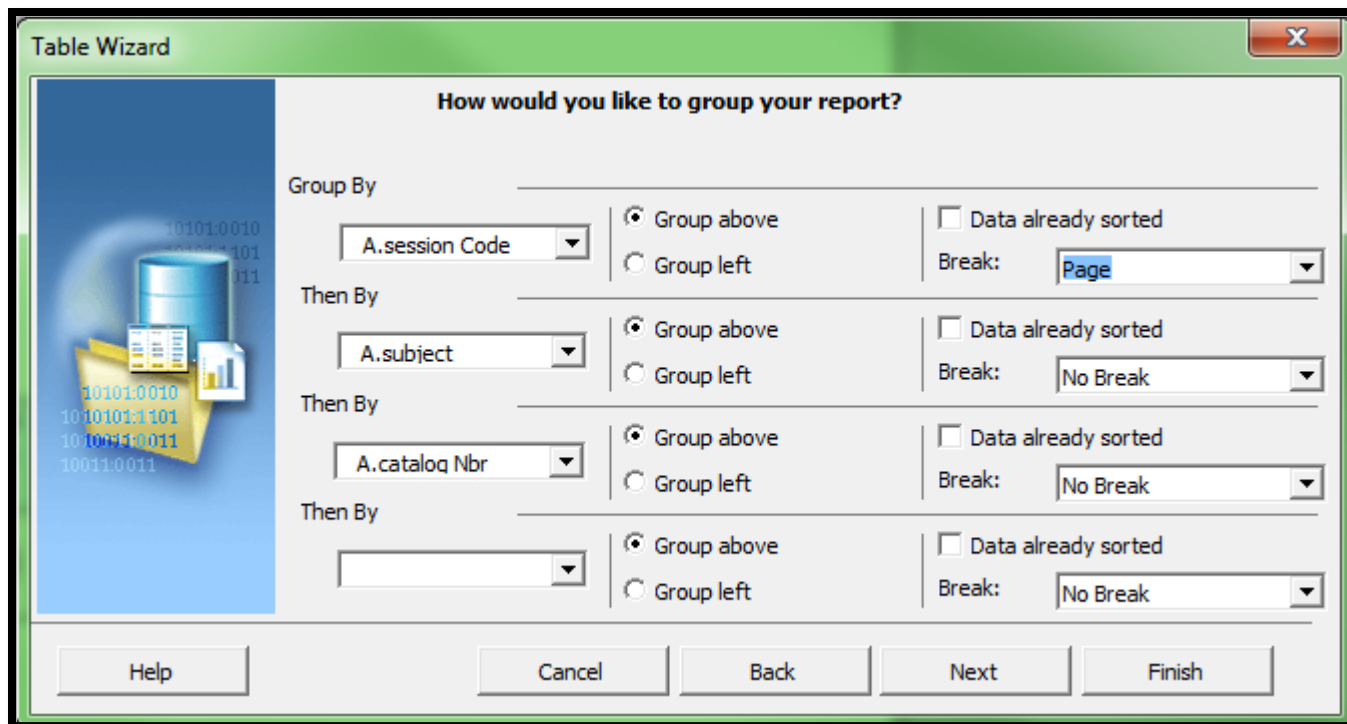
Select which fields you want to be in your document.



Click Next.

Creating Tables and Sorting: Table Wizard

We are now going to group our information. Let's talk about what this means.



The screenshot shows the 'Table Wizard' dialog box with the title 'How would you like to group your report?'. The dialog is divided into four sections, each for a different level of grouping. Each section includes a 'Group By' dropdown, a 'Group above' radio button (selected), a 'Group left' radio button, a 'Data already sorted' checkbox, and a 'Break' dropdown menu.

Grouping Level	Group By	Group above	Group left	Data already sorted	Break
Group By	A.session Code	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	Page
Then By	A.subject	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	No Break
Then By	A.catalog Nbr	<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	No Break
Then By		<input checked="" type="radio"/>	<input type="radio"/>	<input type="checkbox"/>	No Break

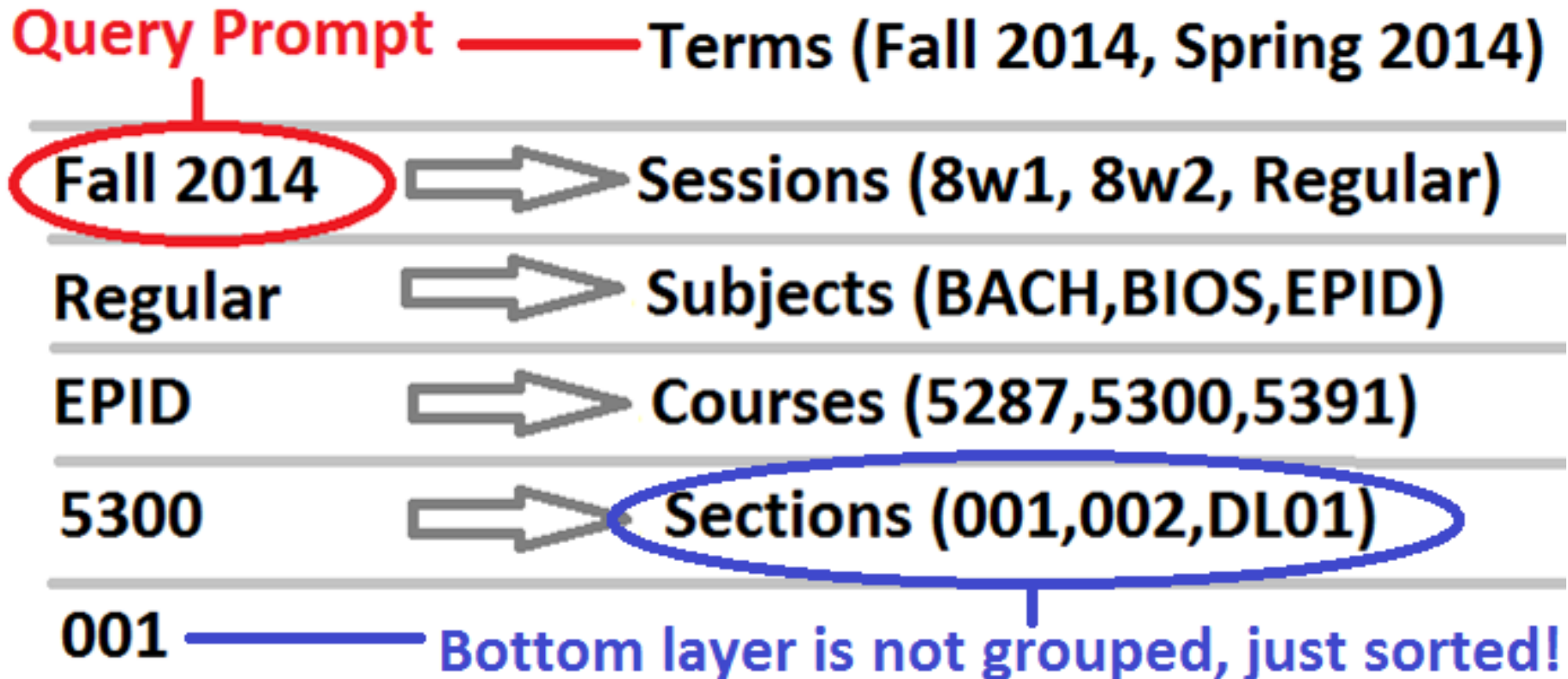
At the bottom of the dialog are five buttons: Help, Cancel, Back, Next, and Finish.

Creating Tables and Sorting: Table Wizard

We want to group together the 'layers':

- 1 term with different lengths of **sessions** (8 week 1, 8 week 2, regular)
- **Subjects** of courses (BACH, BIOS, EOHS, EPID, HMAP)
- Subjects have different **courses** (5300,6303)
- Different classes have different **sections** (.001,.002), but the bottom layer doesn't need to be grouped.

Creating Tables and Sorting: Table Wizard



Creating Tables and Sorting: Table Wizard

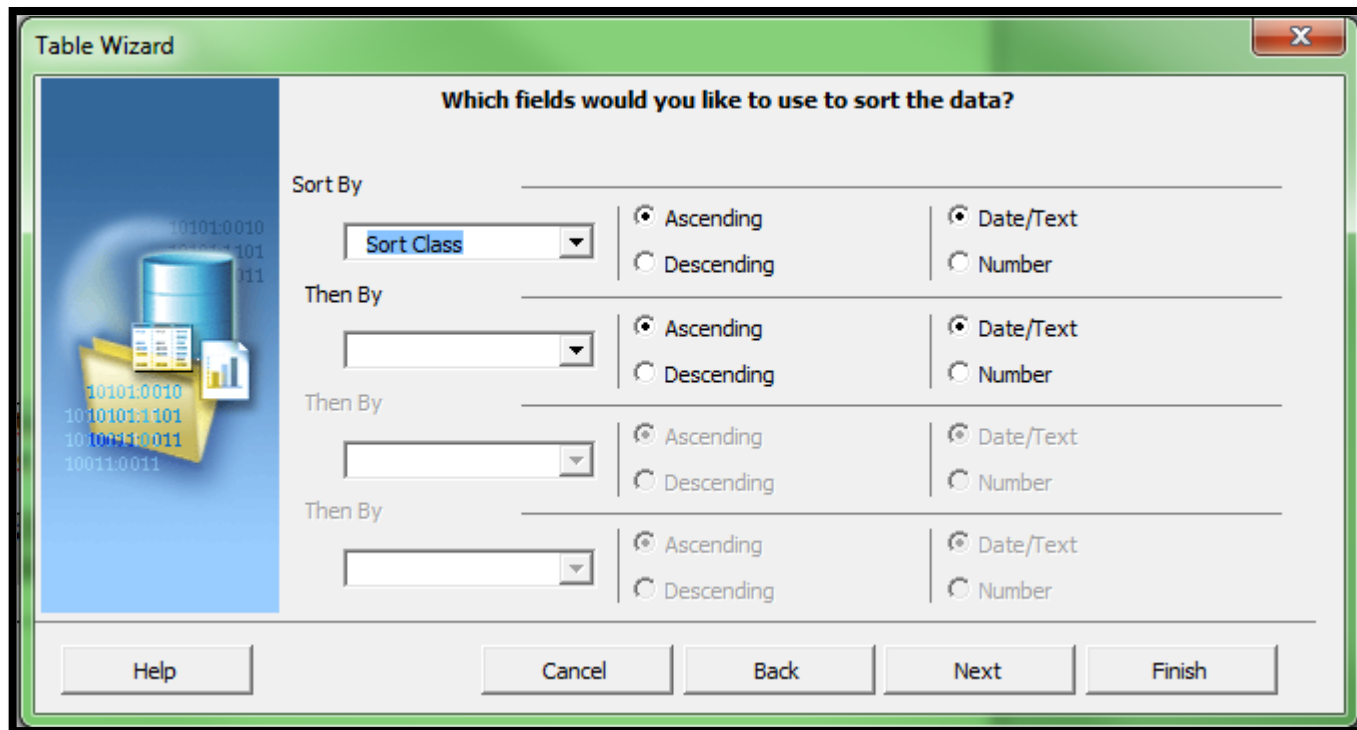
In this section, we also need to decide:

- Do we want a **page break** after this group?
 - In our example, we want a page break after the session (8w1, 8w2, etc.) This makes it so we can easily separate each session and have the nice heading for each one.
- Is our **data pre-sorted** from the query?
 - I don't assume my query is pre-sorted. If your query is specifically sorted, you can select the option that allows you to keep your data pre-sorted

After we decide, select the corresponding options and click Next.

Creating Tables and Sorting: Table Wizard

Decide how you want to sort your data.*



* You cannot sort fields you used for grouping.

Creating Tables and Sorting: Table Wizard

TIP: We really had **problems** having our sections **sort** the way we wanted them.

- If the class had sections .001, .002, .003, etc., we wanted it to sort **numerically**.
- If the class had sections that were instructor based and used numbers such as .194, .187, .241, etc., then we wanted it to sort by instructor **last name** (these are used for Thesis type classes).

Creating Tables and Sorting: Table Wizard

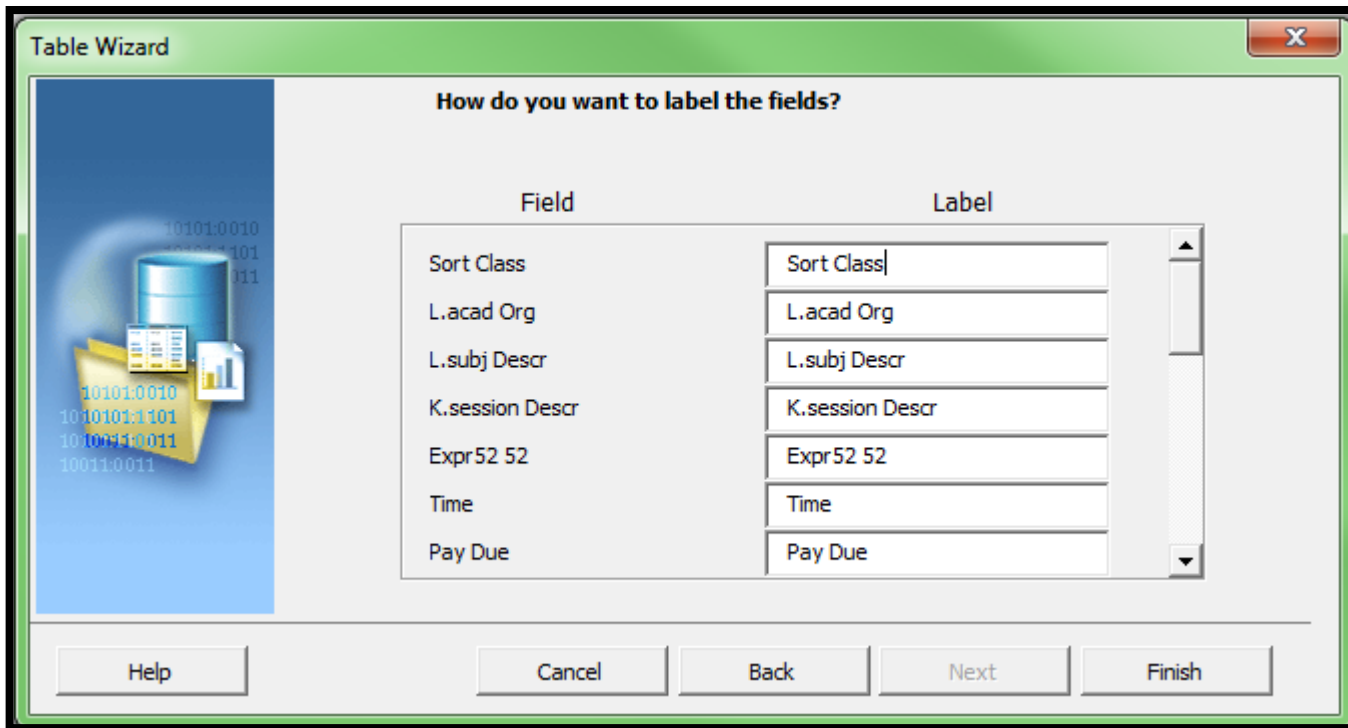
TIP (Continued): To resolve the issue, we created a field in our query that had information we could sort. It included section numbers and last names all in one field. The field was called 'Sort Class'. Here's the what we did for this field:

```
CASE WHEN A.CLASS_SECTION = '001' THEN '001'  
WHEN A.CLASS_SECTION = '002' THEN '002'  
WHEN A.CLASS_SECTION = '003' THEN '003'  
... [continued on till 009]  
ELSE F.LAST_NAME END
```

Use the versatility of PeopleSoft Query to your advantage!
It can help you solve a lot of issues.

Creating Tables and Sorting: Table Wizard

Label your Fields if you want, then click Finish.

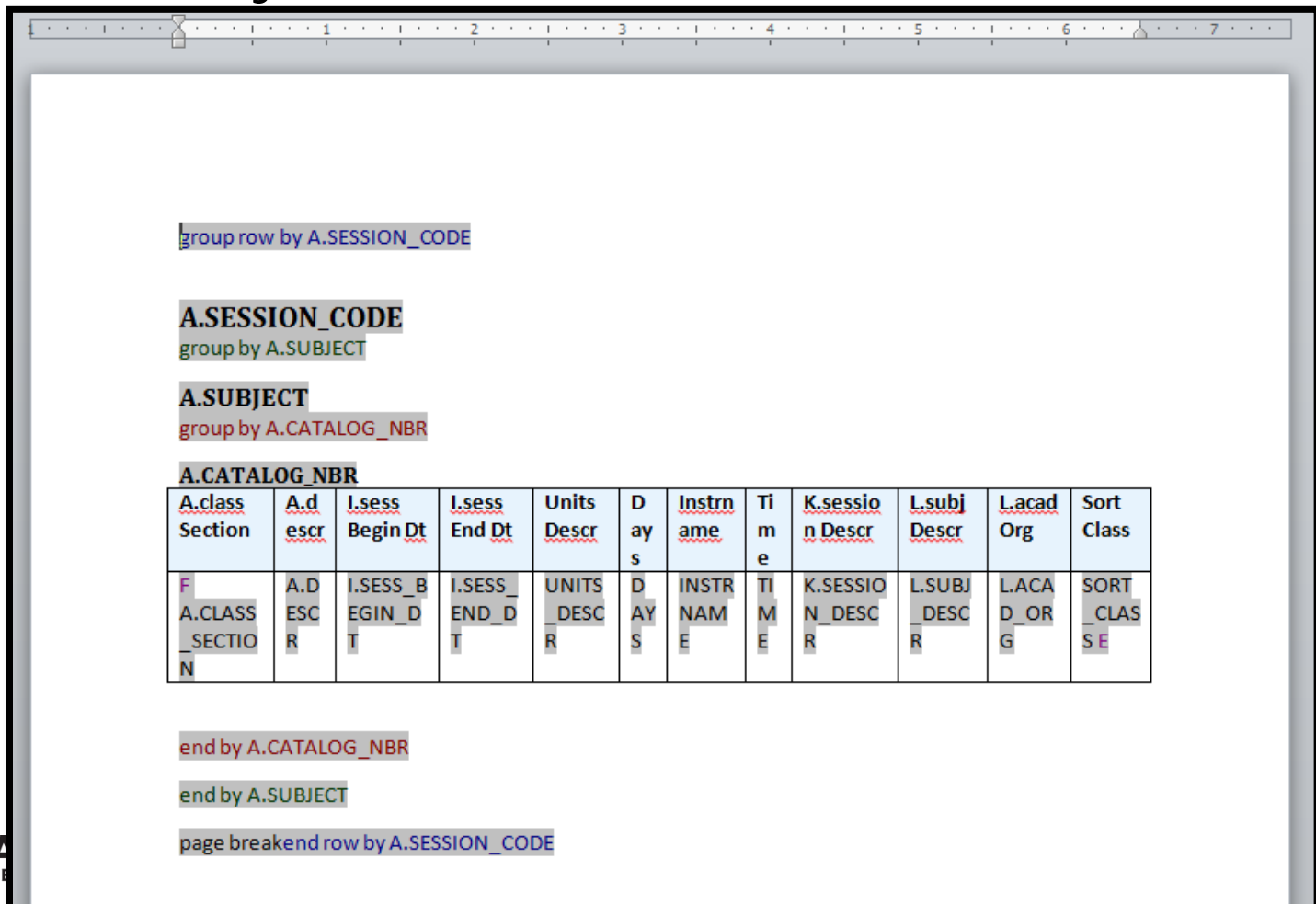


The screenshot shows a 'Table Wizard' dialog box with a green title bar and a close button (X) in the top right corner. The main area is titled 'How do you want to label the fields?'. On the left, there is a blue background with a database icon and binary code. The main content is a table with two columns: 'Field' and 'Label'. The 'Field' column lists: Sort Class, L.acad Org, L.subj Descr, K.session Descr, Expr52 52, Time, and Pay Due. The 'Label' column shows corresponding text boxes, each containing the same text as the field name. At the bottom, there are five buttons: Help, Cancel, Back, Next, and Finish.

Field	Label
Sort Class	Sort Class
L.acad Org	L.acad Org
L.subj Descr	L.subj Descr
K.session Descr	K.session Descr
Expr52 52	Expr52 52
Time	Time
Pay Due	Pay Due

Creating Tables and Sorting: Table Wizard

Your RTF file may look like this:



The screenshot shows a software interface for creating a table. It includes a ruler at the top and several text boxes for defining the table structure. The main part of the interface is a table with 12 columns. The columns are labeled with field names and their corresponding data types. Below the table, there are text boxes for defining the sorting and grouping criteria.

group row by A.SESSION_CODE

A.SESSION_CODE
group by A.SUBJECT

A.SUBJECT
group by A.CATALOG_NBR

A.CATALOG_NBR

<u>A.class</u> Section	<u>A.d</u> escr	<u>I.sess</u> Begin Dt	<u>I.sess</u> End Dt	<u>Units</u> Descr	<u>D</u> ay s	<u>Instr</u> ame	<u>Ti</u> m e	<u>K.sessio</u> n Descr	<u>L.subj</u> Descr	<u>L.acad</u> Org	<u>Sort</u> Class
F A.CLASS _SECTIO N	A.D ESC R	I.SESS_B EGIN_D T	I.SESS_ END_D T	UNITS _DESC R	D AY S	INSTR NAM E	TI M E	K.SESSION_DESCR	L.SUBJ_DESCR	L.ACAD_ORG	SORT_CLAS SE

end by A.CATALOG_NBR

end by A.SUBJECT

page breakend row by A.SESSION_CODE

Creating Tables and Sorting: Table Wizard

1
BACH
5001

A.class Section	A.d esc r	I.sess Begin Dt	I.sess End Dt	Units Descr	D a y s	Instr nam e	Ti m e	K.sessi on Descr	L.sub j Descr	L.aca d Org	Sort Clas s
001	MP H Co mpr ehe nsi ve Exa m	2014-01-06	2014-05-02	0		Cann ell M		Regular Academ ic Session	Behav ioral and Com munit y Hlth	BEH &CO MHL T	001

5297

A.class Section	A.d esc r	I.sess Begin Dt	I.sess End Dt	Units Descr	D a y s	Instr nam e	Ti m e	K.sessi on Descr	L.sub j Descr	L.aca d Org	Sort Clas s
001	Prac tic e Exp in Pu blic He alth	2014-01-06	2014-05-02	1.5		Adrig nola M		Regular Academ ic Session	Behav ioral and Com munit y Hlth	BEH &CO MHL T	001

5310

A.class	A.d	I.sess	I.sess	Units	D	Instr	Ti	K.sessi	L.sub	L.aca	Sort
---------	-----	--------	--------	-------	---	-------	----	---------	-------	-------	------

Creating Tables and Sorting: Make it Pretty

At this point, let's re-organize the data we have:

1 - Regular Academic Session

2014-01-06 - 2014-05-02

BACH -Behavioral and Community Hlth

BACH 5001 MPH Comprehensive Exam

Section	Units	Day	Time	Instructor
001	0			Cannell M

BACH 5297 Practice Exp in Public Health

Section	Units	Day	Time	Instructor
001	1.5			Adrignola M

BACH 5310 Part Approach to Imp Comm Hlth

Section	Units	Day	Time	Instructor
001	3	M	12:00pm-03:00pm	Paul M

BACH 5312 Comm Assessmnt & Prog Planning

Section	Units	Day	Time	Instructor
001	3	W	12:00pm-03:00pm	Moayad N

Creating Tables and Sorting: Make it Pretty

And attempt to make it pretty:

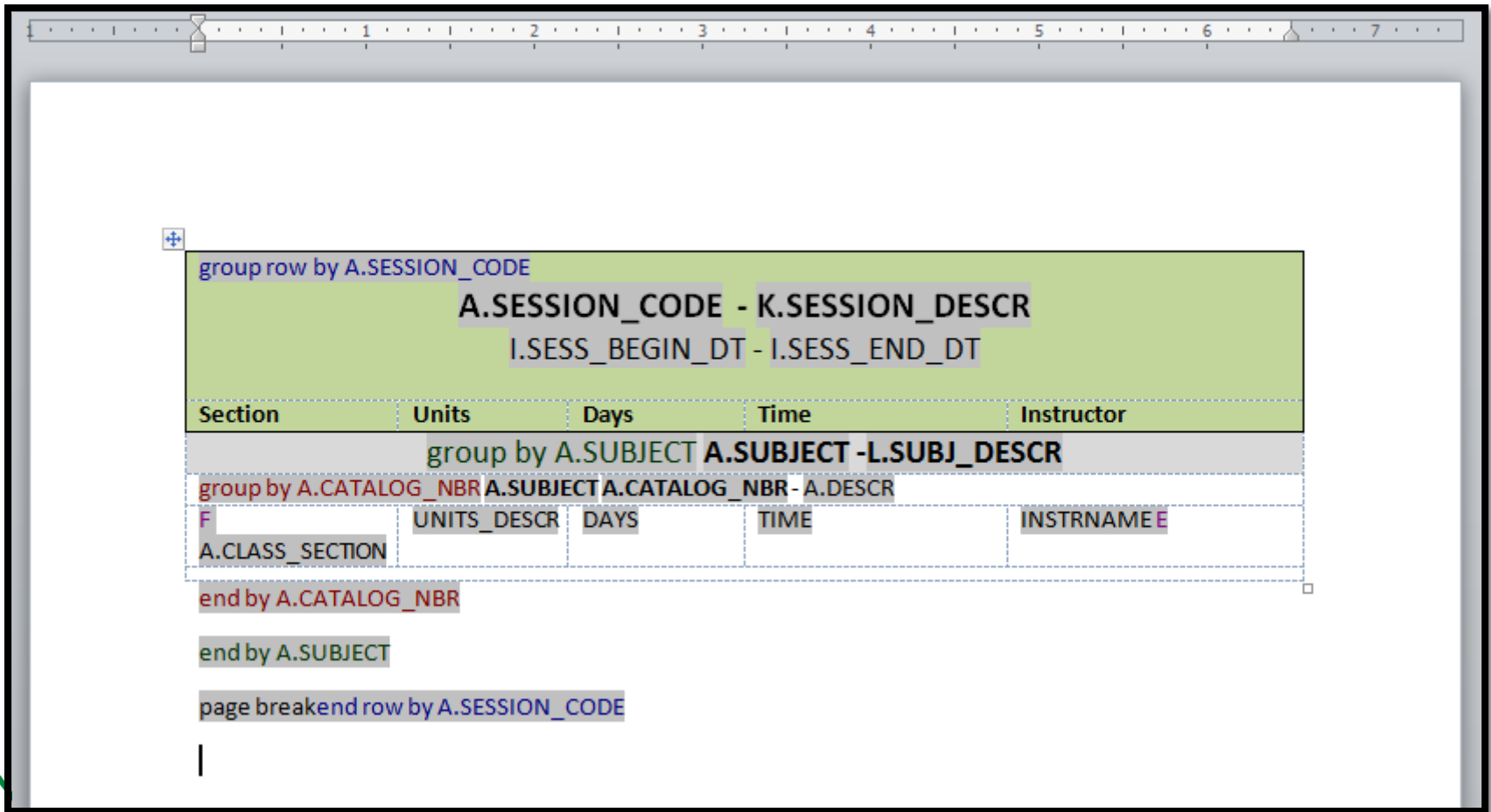
1 - Regular Academic Session

2014-01-06 - 2014-05-02

Section	Units	Days	Time	Instructor
BACH -Behavioral and Community Hlth				
BACH 5001 - MPH Comprehensive Exam 001	0			Cannell M
BACH 5297 - Practice Exp in Public Health 001	1.5			Adrignola M
BACH 5310 - Part Approach to Imp Comm Hlth 001	3	M	12:00pm-03:00pm	Paul M
BACH 5312 - Comm Assessmnt & Prog Planning 001	3	W	12:00pm-03:00pm	Moayad N
BACH 5313 - Intro to Data Mgmt & Stat Comp 001	3	Th	03:00pm-06:00pm	Cannell M
BACH 5316 - Comm Prog Evaluation Interven 001	3	T	09:00am-12:00pm	Spence-almaguer E
BACH 5324 - Intro to Health Disparities				

Creating Tables and Sorting: Make it Pretty

Here's the RTF file view of the previous slide:



```
group row by A.SESSION_CODE
A.SESSION_CODE - K.SESSION_DESCR
I.SESS_BEGIN_DT - I.SESS_END_DT
Section      Units      Days      Time      Instructor
group by A.SUBJECT A.SUBJECT -L.SUBJ_DESCR
group by A.CATALOG_NBR A.SUBJECT A.CATALOG_NBR - A.DESCR
F
A.CLASS_SECTION UNITS_DESCR DAYS TIME INSTRNAME E
end by A.CATALOG_NBR
end by A.SUBJECT
page breakend row by A.SESSION_CODE
|
```

Creating Tables and Sorting: Make it Pretty

TIP #1: Tables make formatting easier. I recommend creating a NEW table, THEN copying in your data.* Otherwise, you may run into issues (accidentally deleting the grouping coding, keeping weird formatting from previous text, etc.)

* You must keep the grouping coding in the correct position or you will have errors.

Creating Tables and Sorting: Make it Pretty

TIP #2: Use tables to help you create 'space'.

BEFORE:

BACH 6399 - Doc Ind Study in B	
189	Var Unit
202	Var Unit
195	Var Unit
212	Var Unit
205	Var Unit
194	Var Unit

Section	Units
group by	
group by A.CATALOG_NBR A.S	
F	UNITS_DE
A.CLASS_SECTION	
end by A.CATALOG_NBR	

Creating Tables and Sorting: Make it Pretty

TIP #2: Use tables to help you create 'space'*.

AFTER:

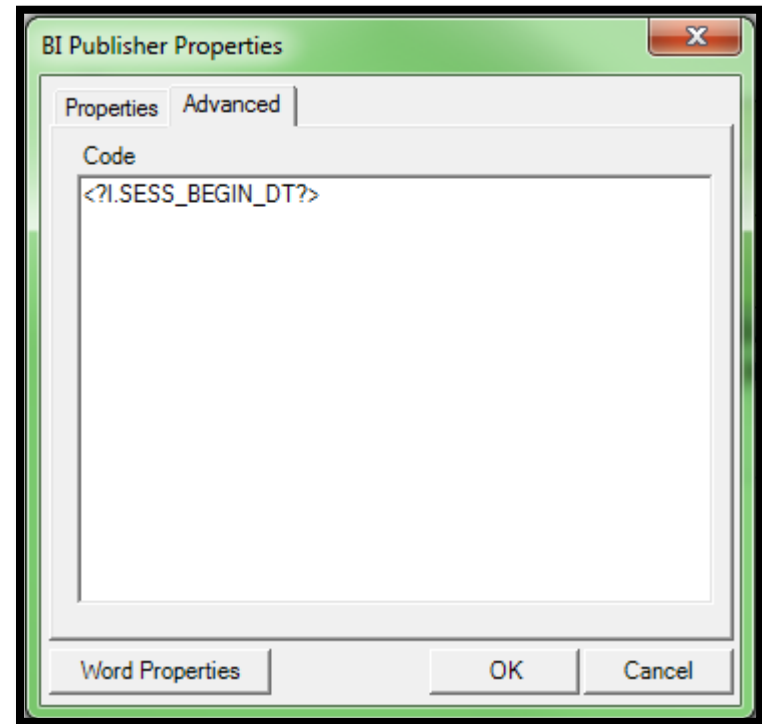
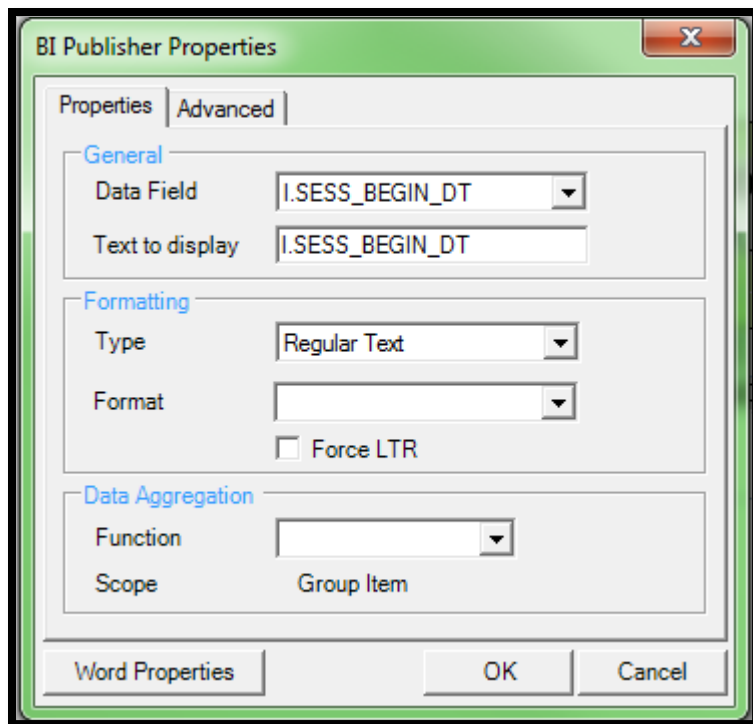
BACH 6399 - Doc Ind Study in B	
189	Var Unit
202	Var Unit
195	Var Unit
212	Var Unit

section	Units	Da
group by A.SU		
group by A.CATALOG_NBR A.SUBJECTA		
F	UNITS_DESCR	DA
A.CLASS_SECTION		
end by A.CATALOG_NBR		
end by A.SUBJECT		

*Size of the space can be adjusted by increasing or decreasing the text size of the extra line.

Advanced Techniques

You can double click a field to see some details about it.



Advanced Techniques: Date Formatting

Problem: The date that output was ugly from the query. We wanted it to look different.

BEFORE:

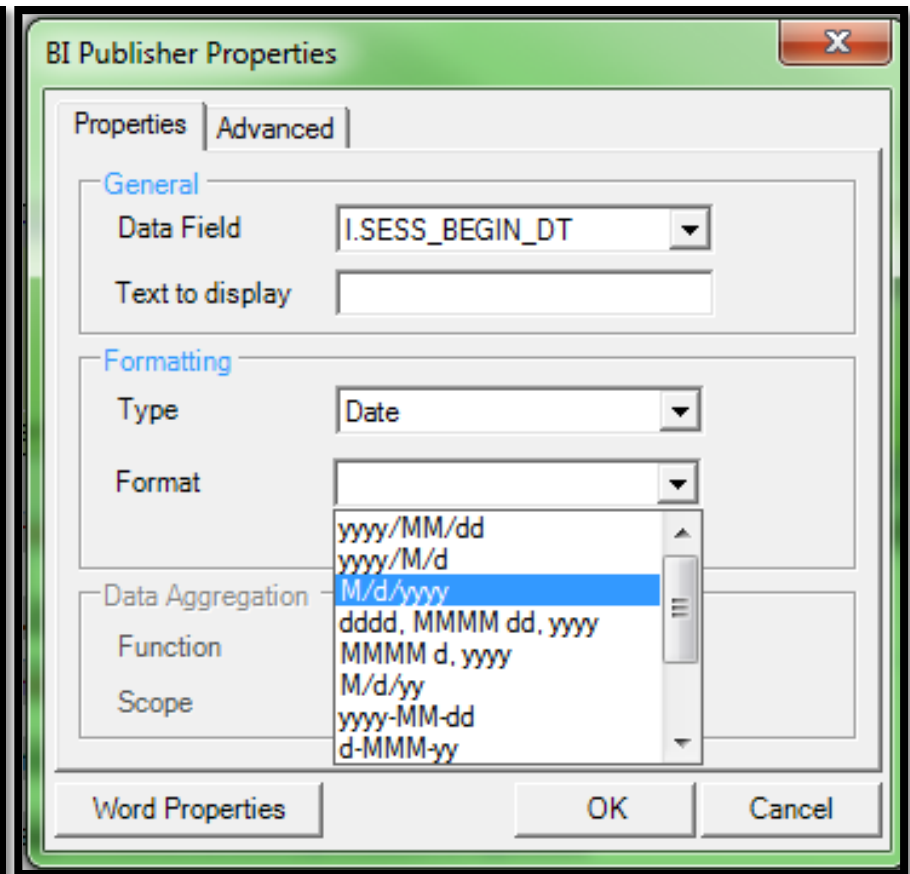
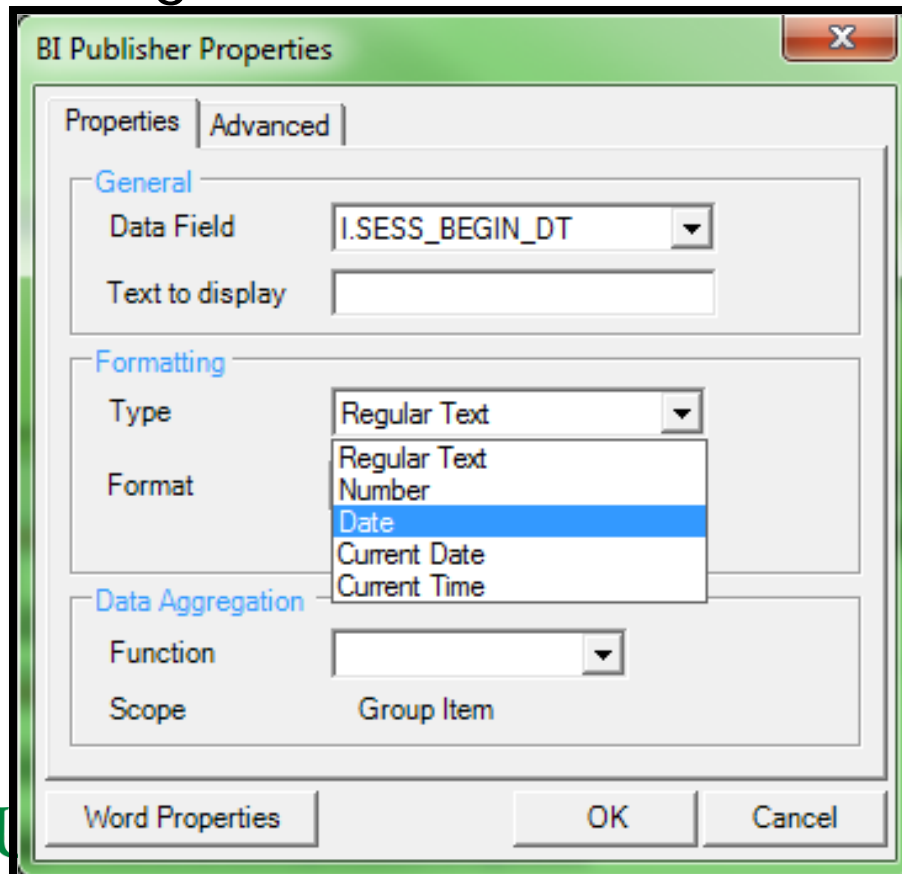
1 - Regular Academic Session
2014-01-06 - 2014-05-02

AFTER:

1 - Regular Academic Session
Jan 6, 2014 - May 2, 2014

Advanced Techniques: Date Formatting

Double click the date field and change the Formatting Settings:



Advanced Techniques: IF Statements

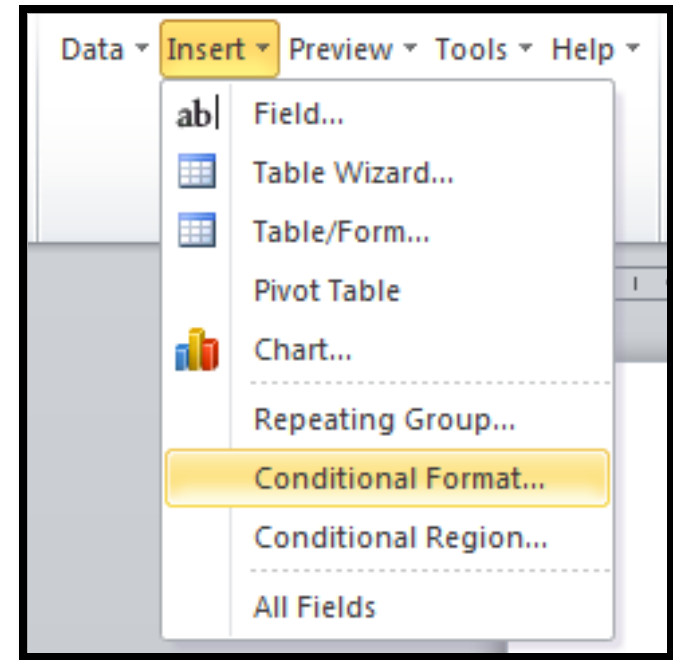
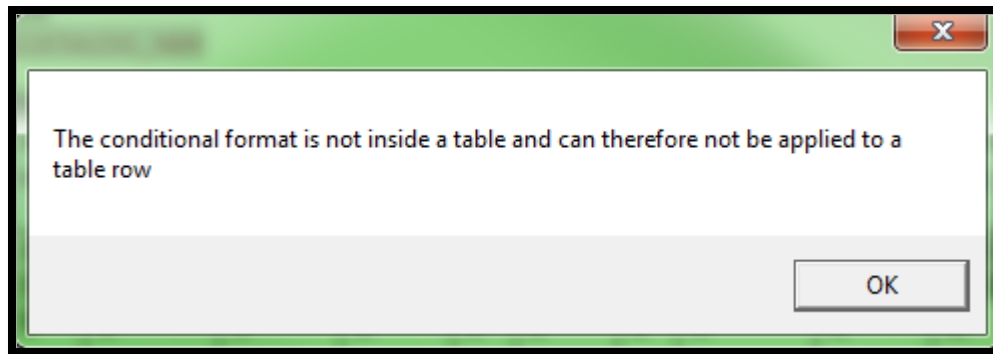
Problem: Sometimes you may want to use an 'IF' statement in your RTF file. You can use this to:

- Make certain texts formatted differently (i.e. – numbers less than 100 are formatted red)
- Replace one text with another text (i.e. – any time H is listed, show the words Half-time)

Advanced Techniques: IF Statements

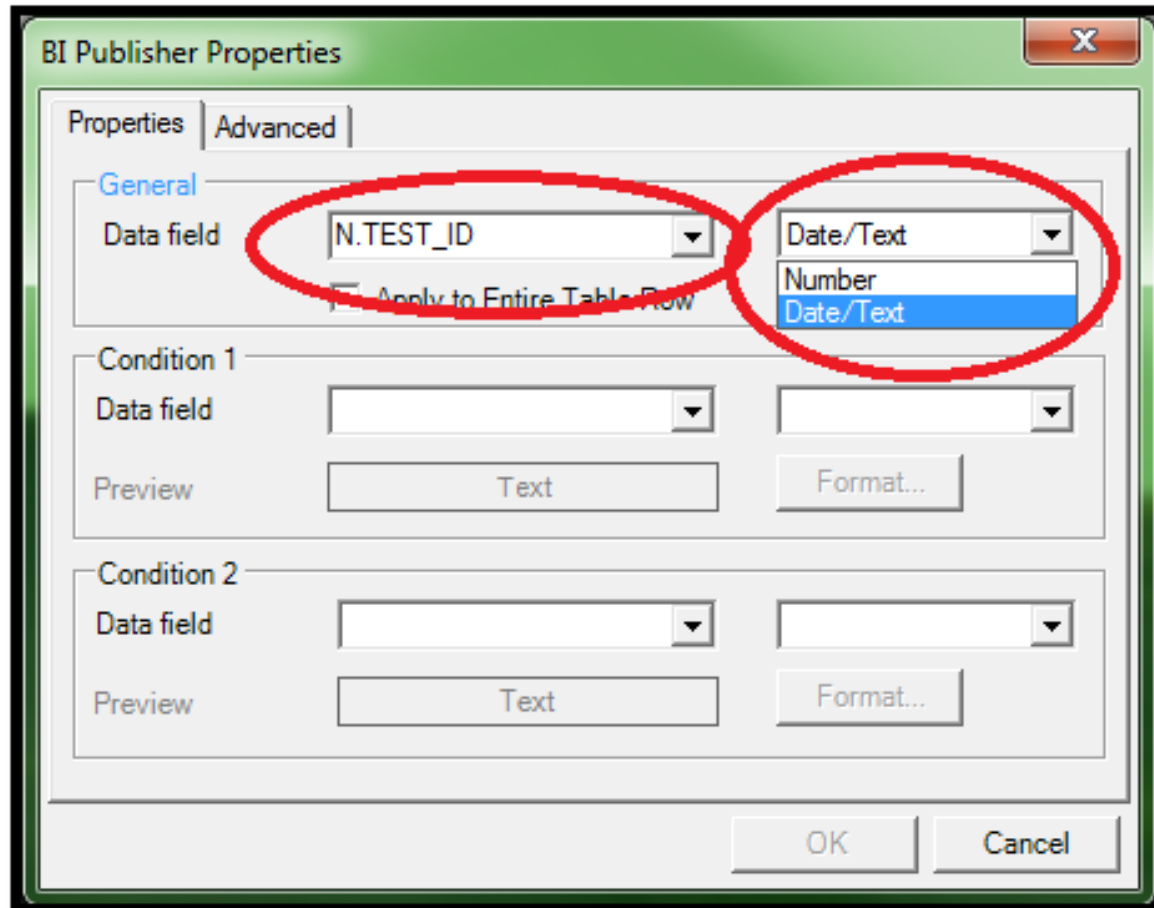
Click on Insert > Conditional Format...

If your cursor is not in a table, may give you an error:



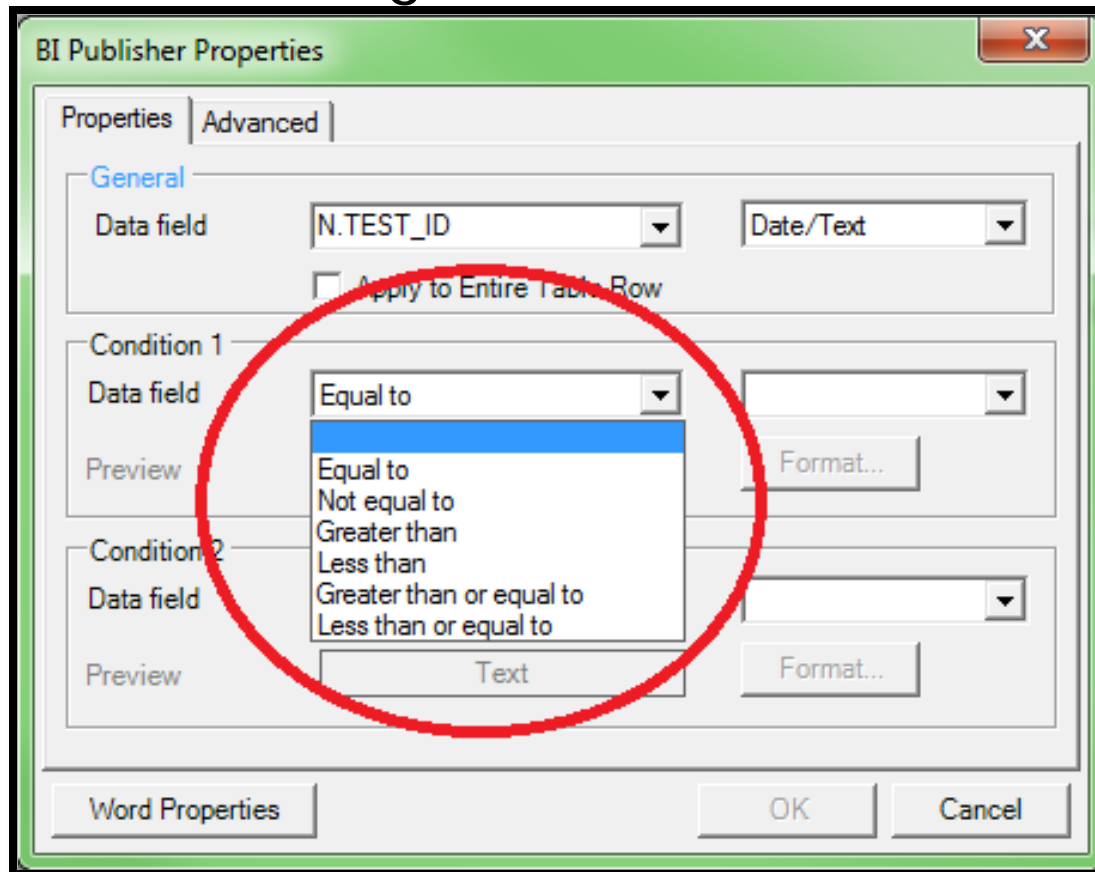
Advanced Techniques: IF Statements

- Select the field you wish to use, and the type of data.



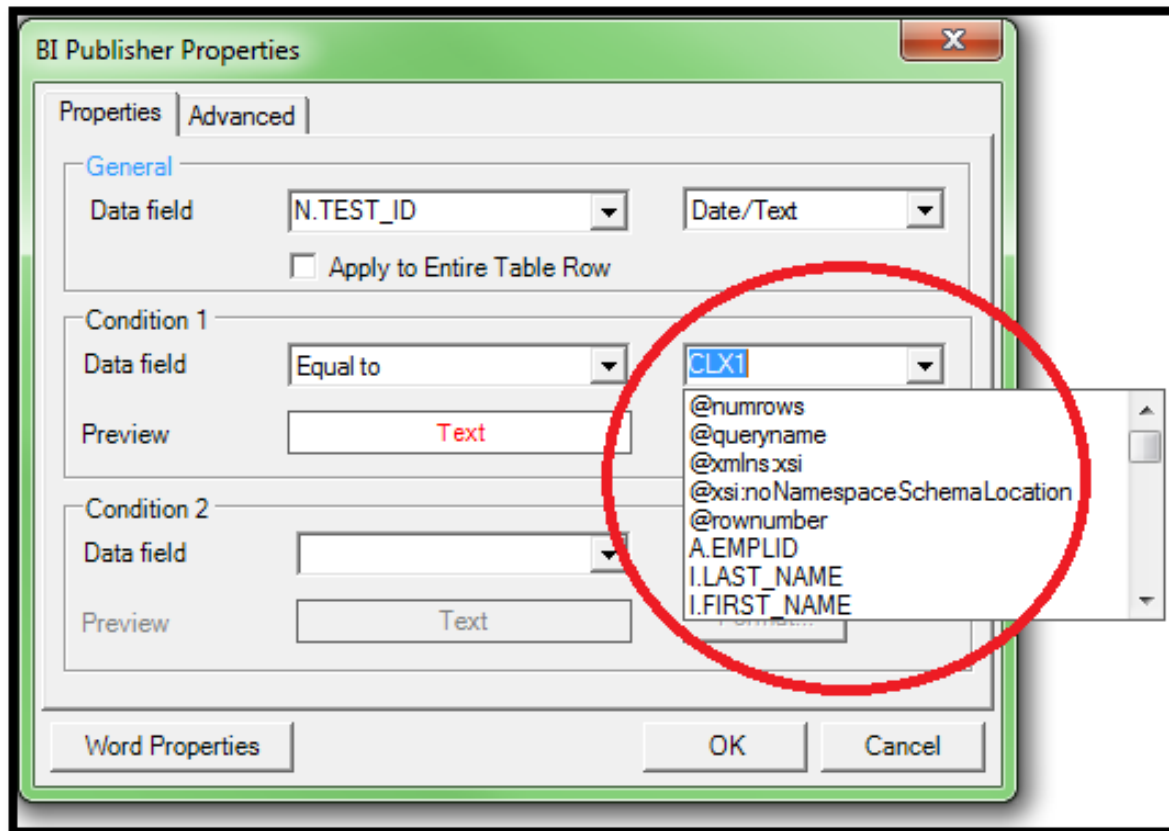
Advanced Techniques: IF Statements

- Under Condition 1, you can select the type of condition you are looking for:



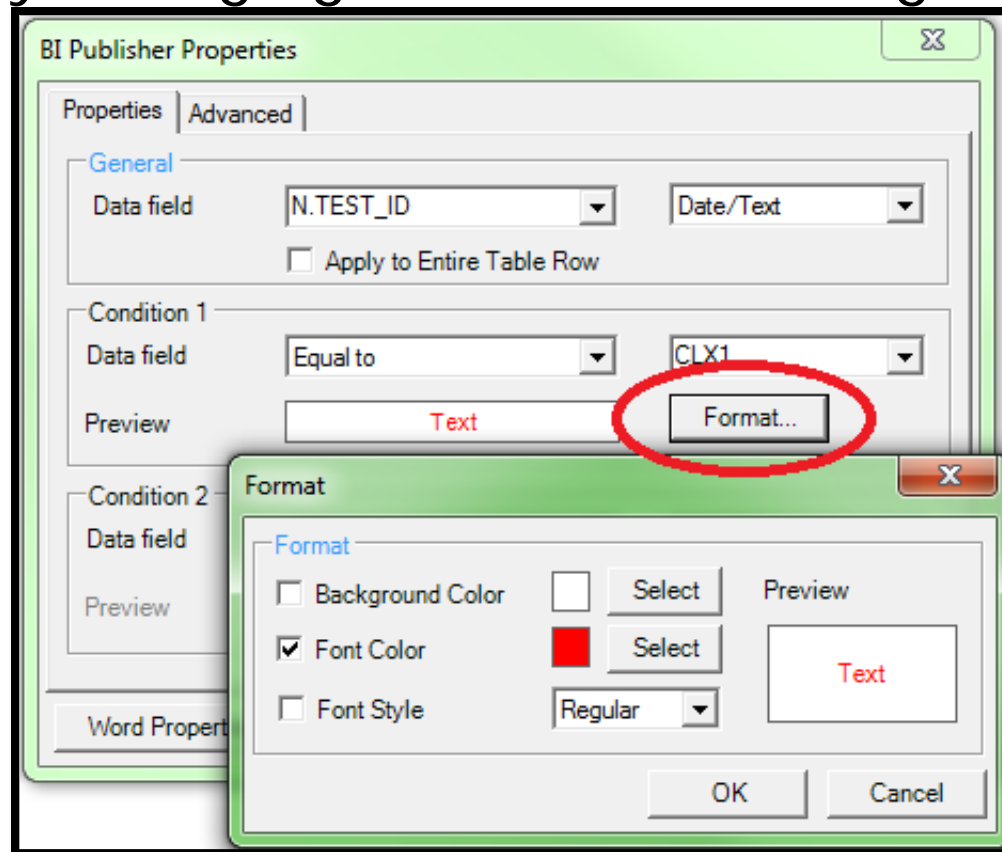
Advanced Techniques: IF Statements

- Then type in any text or select another field:



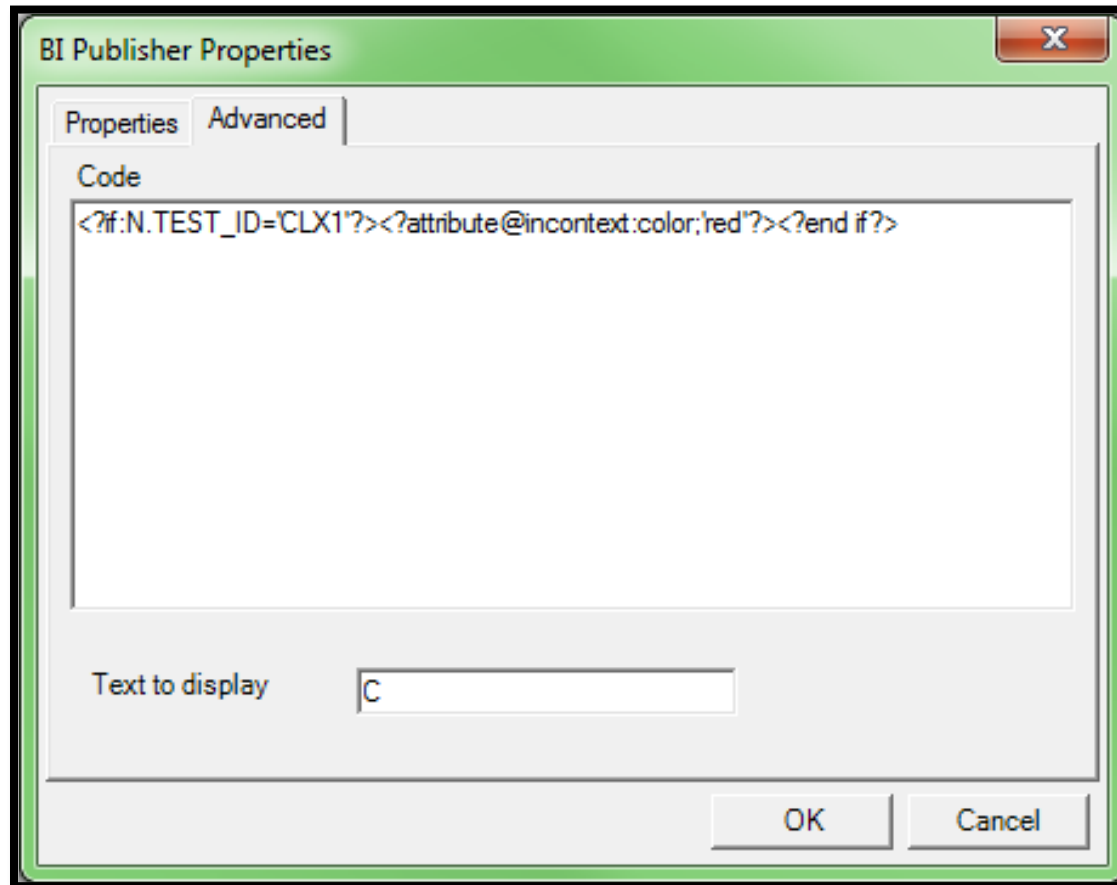
Advanced Techniques: IF Statements

- The text be formatted based on the supplied conditions by changing the Format settings:



Advanced Techniques: IF Statements

- In the Advanced tab, we can now see the coding for this IF statement:



Advanced Techniques: IF Statements

<?if:N.TEST_ID='CLX1'?> - Condition to look for

<?attribute@incontext:color;'red'?> - Result of met condition

<?end if?> - Ending the IF statement

N.TEST_ID = The field we selected

CLX1 = free form text (could be another field)

attribute@incontext:color;'red' = coding

Advanced Techniques: IF Statements

```
<?if:N.TEST_ID='CLX1'?>
```

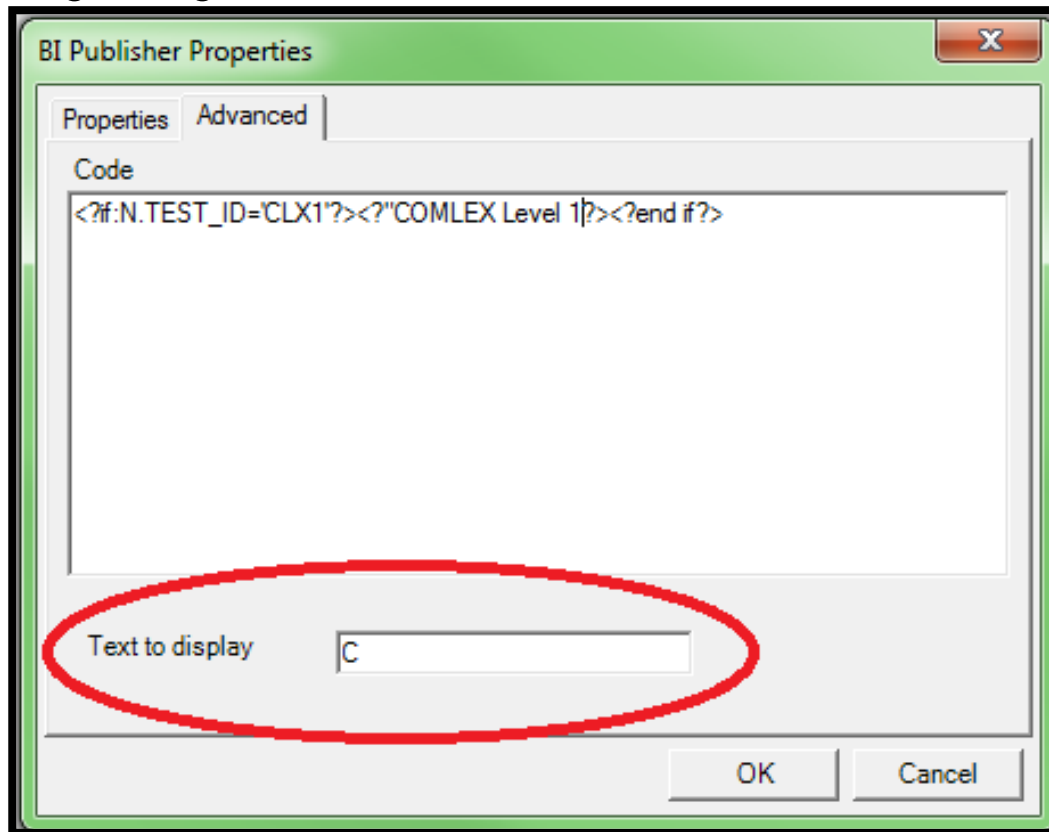
```
<?"COMLEX Level 1"?'>
```

```
<?end if?>
```

- The above code indicates that if N.TEST_ID is CLX1, display the text COMLEX Level 1.

Advanced Techniques: IF Statements

After you have written your code, indicate how you want it to display in your RTF:



Advanced Techniques: IF Statements

BEFORE:

Test	Te
CLX1	3D
CLX2	3D
CLX2PE	CL
STEP1	3D
STEP2CK	3D

AFTER:

Test
CLX1 COMPLEX Level 1
CLX2
CLX2PE
STEP1
STEP2CK

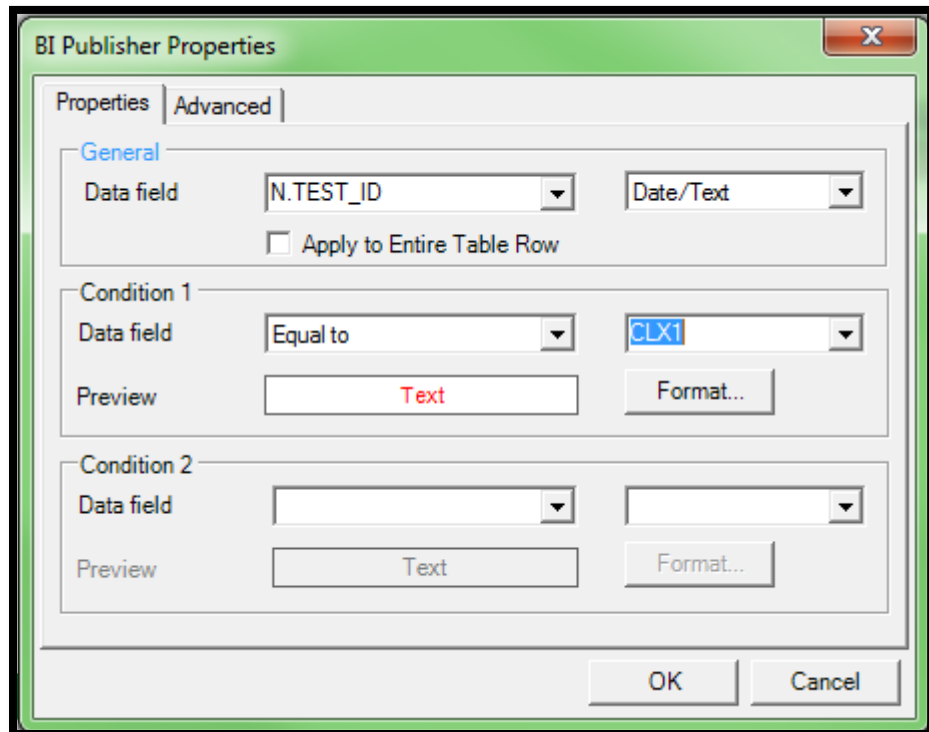
RTF View:

Test
N.TEST_IDC

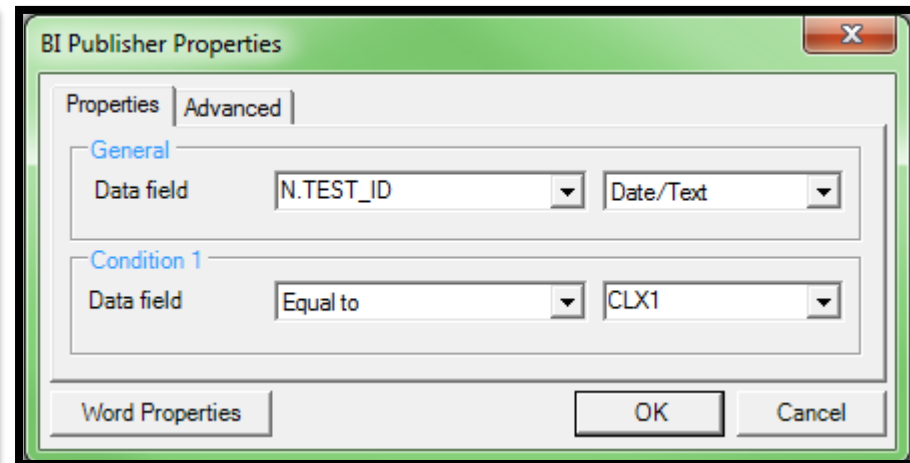
Advanced Techniques: IF Statements

After initially creating the 'Conditional Format', it may look a bit different:

Set up view:



After set up:



Advanced Techniques: IF Statements

We can also combine multiple 'IF' statements into one coding, like this:

```
<?if:N.TEST_ID='CLX1'?><?"COMLEX Level 1"?> <?end if?>  
<?if:N.TEST_ID='CLX2'?><?"COMLEX Level 2"?><?end if?>  
<?if:N.TEST_ID='CLX2PE'?><?"COMLEX Level 2 PE"?><?end if?>  
<?if:N.TEST_ID='STEP1'?><?"USMLE Step 1"?><?end if?>  
<?if:N.TEST_ID='STEP2CK'?><?"USMLE Step 2 CK"?><?end if?>
```

This can also be written into the query (unless you don't have access!)

Advanced Techniques: IF Statements

Here's what that looks like:

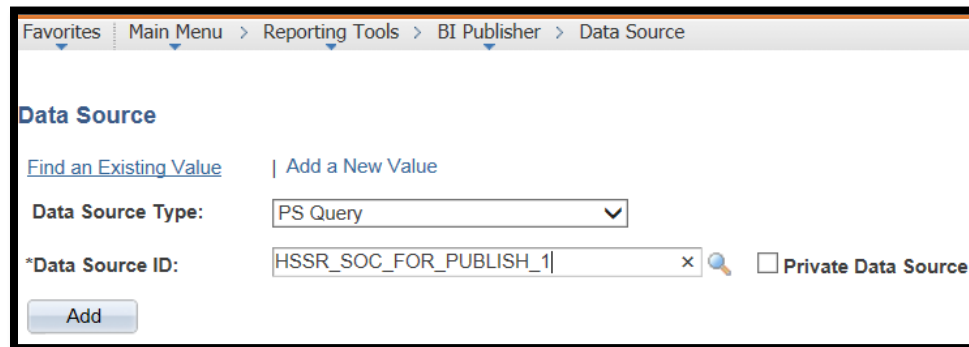
Test
N.TEST_ID C

Test
CLX1 COMLEX Level 1
CLX2 COMLEX Level 2
CLX2PE COMLEX Level 2 PE
STEP 1 USMLE Step 1
STEP2CK USMLE Step 2 CK

How to implement the RTF into PeopleSoft

Once you have the RTF template the way you want it, you must load it into PeopleSoft.

1. Add a New Data Source (Reporting Tools > BI Publisher > Data Source > Add a New Value)
2. Choose 'PS Query' as Data Source Type
3. Search for the query you wish to use and Add



The screenshot shows the 'Data Source' configuration page in PeopleSoft. The breadcrumb navigation at the top reads: Favorites | Main Menu > Reporting Tools > BI Publisher > Data Source. The page title is 'Data Source'. There are two links: 'Find an Existing Value' and 'Add a New Value'. The 'Data Source Type' is set to 'PS Query' in a dropdown menu. The '*Data Source ID' field contains the text 'HSSR_SOC_FOR_PUBLISH_1|'. There is a search icon to the right of the ID field and a checkbox for 'Private Data Source' which is currently unchecked. An 'Add' button is located at the bottom left of the form.

Adding Data Source Continued

- Add a Description and Set the Owner ID (values should be setup by developers)
- Generate the Sample Data File and Schema File > Save

Data Source

Data Source Type PS Query
Data Source ID HSSR_SOC_FOR_PUBLISH_1

Data Source Properties

Description Active
Owner ID

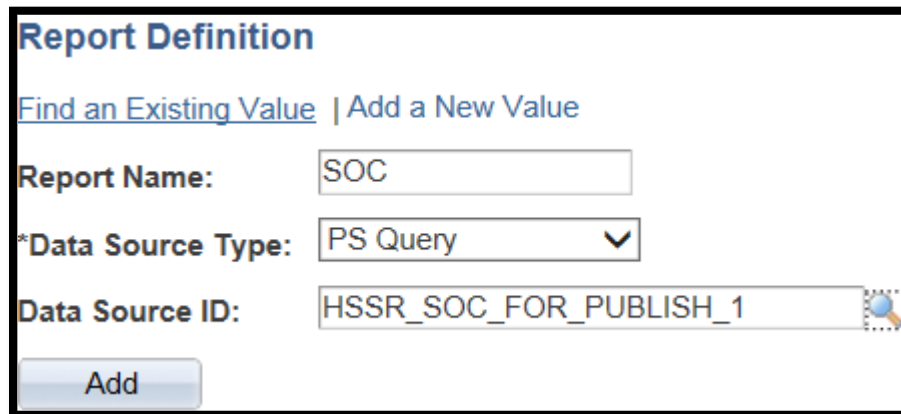
Registered Date/Time 07/17/14 9:52:08AM
Registered By ajr0096
Last Update Date/Time
Updated By

Related Files

File Type	File	Generate File	Or	Upload File
Sample Data File	HSSR_SOC_FOR_PUBLISH_1.XML	Regenerate	Or	Upload
Schema File	HSSR_SOC_FOR_PUBLISH_1.XSD	Regenerate		

Adding the Report Definition

- Reporting Tools > BI Publisher > Report Definition > Add a New Value
- Name your report > Add the Data Source (the one you just added) > Click Add



The screenshot shows a web form titled "Report Definition". At the top, there are two links: "Find an Existing Value" and "Add a New Value". Below the links, there are three input fields: "Report Name" with the value "SOC", "*Data Source Type" with a dropdown menu showing "PS Query", and "Data Source ID" with the value "HSSR_SOC_FOR_PUBLISH_1". A magnifying glass icon is visible to the right of the Data Source ID field. At the bottom left of the form is a button labeled "Add".

Adding the Report Definition Definition Tab

- Definition Tab
- Screen should look like this (with your own values of course)

Definition | Template | Output | Properties | Security | Bursting

Report Name: SOC

Data Source

Data Source Type: PS Query
Data Source ID: HSSR_SOC_FOR_PUBLISH_1
Data Source Description: Schedule of Classes Test

Report Properties

Report Description: Schedule of Classes Test

*Report Status: Active

*Report Category ID: HSSR HSC SR

Owner ID: HSC - Student Records

*Template Type: RTF

Retention Days:

Registered Date/Time: Registered By:

Updated Date/Time: Updated By:

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

Add Update/Display Include History Correct History

Adding the Report Definition Template Tab

- Name your Template and description
 - Channel can be left blank
- Upload your RTF file > Change Status to Active

The screenshot shows a web application interface with several tabs: Definition, Template, Output, Properties, Security, and Bursting. The 'Template' tab is active. The 'Report Name' is 'SOC'. The 'Template' section includes fields for 'Template ID' (SOC_1), 'Description' (SOC for AY14-15), '*Language Code' (English), and 'Channel'. There is a checked checkbox for 'Default Template'. The 'Template Files' section includes 'Effective Date' (07/17/2014), '*Status' (Active), and 'Template File' (SOC1.rtf). There are buttons for 'Upload', 'Preview', and 'Use Alt. XML'. At the bottom, there are buttons for 'Add', 'Update/Display', 'Include History', and 'Correct History', and a 'Save' button.

Definition | **Template** | Output | Properties | Security | Bursting

Report Name: SOC

Template Find | View All | First 1 of 1 Last

Template ID SOC_1 Default Template

Description SOC for AY14-15

*Language Code English Channel

Template Files Find | View All | First 1 of 1 Last

Effective Date 07/17/2014

*Status Active Use Data Transform

Template File SOC1.rtf Upload Preview Use Alt. XML

Add Update/Display Include History Correct History

Save

Adding the Report Definition Output Tab

- Choose the Format Type and Default

Definition | Template | **Output** | Properties | Security | Bursting

Report Name: SOC

General

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

File Name:

Add | Update/Display | Include History | Correct History

Save

Adding the Report Definition Security Tab

- Our office usually assigns a role assigned to staff in the Registrar's Office

The screenshot shows the 'Security' tab of a report definition interface. The report name is 'HSSR_SOC_ALL'. A checkbox labeled 'Allow viewer ID assignment at report runtime' is checked. Below this is a table with one entry: 'Role' (selected from a dropdown), 'HSSR_REG_SR_STAFF' (entered in the 'Distribution ID' field), and 'HSC Registrar Senior Staff' (entered in the 'Description' field). The table has columns for 'ID Type', 'Distribution ID', and 'Description'. Navigation buttons include 'Return to Search', 'Previous in List', 'Next in List', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A 'Save' button is at the bottom left.

ID Type	Distribution ID	Description
Role	HSSR_REG_SR_STAFF	HSC Registrar Senior Staff

- Save and you should be Set!

To Run a Report

- Reporting Tools > BI Publisher > Query Report Viewer
- Search for the Report Name
- Click 'View Report'

The screenshot shows the 'Query Report Viewer' interface. At the top, there is a breadcrumb trail: 'Favorites | Main Menu > Reporting Tools > BI Publisher > Query Report Viewer'. Below this, the title 'Query Report Viewer' is displayed. A search instruction reads: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' The search criteria are: '*Search by:' followed by a dropdown menu set to 'Report Name', the text 'begins with', and a text input field containing 'HSSR_SOC'. There are two buttons: 'Search' and 'Advanced Search'. Below the search area, the 'Search Results' section is shown with a link for 'Show Template Prompts'. The results are presented in a table with columns: 'Report Name', 'Description', 'Data Source ID', '*Format', 'Burst', and 'View Report'. The table contains two rows of results. At the bottom right of the table, there are navigation controls: 'Personalize | Find | View All | First | 1-2 of 2 | Last'.

Report Name	Description	Data Source ID	*Format	Burst	View Report
HSSR_SOC	HSC SOC FALL	HSSR_CLASS_LISTING_ALL_FALL	PDF	N	View Report
HSSR_SOC_ALL	HSC Schedule of Classes	HSSR_SOC_FOR_PUBLISH	PDF	N	View Report

BI Publisher in the Registrar: Enrollment Verifications

BEFORE:

University of North Texas Health Science Center
Registrar's Office
3500 Camp Bowie Boulevard
Fort Worth, TX 76107
United States

Page 1 of 1

-

Enrollment Verification as of 07/15/2014

Name: ██████████

ID Nbr: ██████████

SSN: ██████████

Current Program of Study

Career	Academic Program	Exp Comp Dt
Osteopathic Medical School	Doctor of Osteopathic Medicine	05/21/2016

Academic Plan	Degree	Declare Dt	Sub-Plan
Osteopathic Medicine	DO	08/02/2007	Rural Osteopathic Med Ed

Enrollment History

Term	Career	Begin Date	End Date	Units	Status
Fall 2014 Medical Term	MEDS	07/21/2014	12/19/2014	27.00	Full-Time
Fall 2014 Medical Te			Total	27.00	Full-Time

***** End of Certification *****

The enrollment for this student is certified for the selected term(s) as of the date printed.
Changes to this enrollment can occur at any time following this certification.

BI Publisher in the Registrar: Enrollment Verifications

AFTER:



University of North Texas Health Science Center
Office of the Registrar, EAD 244
3500 Camp Bowie Blvd.
Fort Worth, TX 76107-2699
(817) 735-2201 / Fax (817) 735-0448
registrar@unthsc.edu
OPE-ID 00976800

Enrollment Verification as of July 15, 2014

Name: [REDACTED]
Student ID: [REDACTED]
SSN: ***-**- [REDACTED]
Birthdate: [REDACTED]

Current Program of Study

Career	Degree	Matric.	Exp. Grad.
Osteopathic Medical School	Doctor of Osteopathic Medicine	Fall 2012	5/21/2016

Enrollment History

Osteopathic Medical School				
Term	Degree	Term Dates	Units	Status
Fall 2014 Medical Term	DO	7/7/2014 - 12/19/2014	27.000	Full-time

A.J. Randolph, Executive Director
of Enrollment Services & Registrar

BI Publisher in the Registrar: Board Score Verifications

BEFORE:



Division of Student Affairs

July 15, 2014

To Whom It May Concern:

This letter will serve to verify the National Board of Osteopathic Medical Examiners (NBOME) COMLEX scores and National Board of Medical Examiners (NBME) USMLE scores for Student Doctor [REDACTED]. Student Doctor [REDACTED] is a student at the University of North Texas Health Science Center / Texas College of Osteopathic Medicine for the 2012-2013 academic year and anticipates graduating on May 17, 2014.

Test	Exam Date	3-Digit Score	2-Digit Score	Status
COMLEX Level 1	06/15/2011	■	■	Passed
COMLEX Level 2PE	05/18/2012	-	-	Passed
COMLEX Level 2CE	07/19/2012	■	■	Passed
USMLE Step 1	06/11/2011	■	■	Passed
USMLE Step 2CK	07/17/2012	■	■	Passed

Please feel free to contact me at (817) 735-2483 should you have any questions.

Sincerely,

Emily Rhodes
Enrollment Services Assistant
Office of the Registrar

Office of the Registrar
3500 Camp Bowie Blvd., Fort Worth, TX 76107-2699
817 735-2201 PHONE 817 735-0448 FAX
registrar@unttsc.edu



BI Publisher in the Registrar: Board Score Verifications

AFTER:



Division of Student Affairs

Board Score Verification as of July 15, 2014

Name: [REDACTED]
Student ID: [REDACTED]
Birthdate: [REDACTED]
SSN: ***-**- [REDACTED]

Spring 2014 Medical Term

Term Dates	Degree	Matric.	Exp. Grad.
1/6/2014 - 5/16/2014	Doctor of Osteopathic Medicine	Fall 2010	5/16/2014

Test	Date of Exam	3 Digit Score
COMLEX Level 1	6/11/2012	[REDACTED] - Pass
COMLEX Level 2CE	7/19/2013	[REDACTED] - Pass
COMLEX Level 2PE	11/5/2013	Pass
USMLE Step 1	6/4/2012	[REDACTED] - Pass
USMLE Step 2CK	7/16/2013	[REDACTED] - Pass

A.J. Randolph, Executive Director
of Enrollment Services & Registrar

Office of the Registrar
3500 Camp Bowie Blvd., Fort Worth, TX 76107-2699
817 735-2201 PHONE 817 735-0448 FAX
registrar@unttsc.edu

BI Publisher in the Registrar: Permission Numbers

BEFORE:

10/5/2010

Enrollment Permission Numbers for: BIOS/Biostatistics

1

BIOS 5397 Practice Exp in Public Health

Coggin, Claudia K	Section No. = 001	Class Number: 8063	Enrollment Capacity = 20
			<u>Expiration Date</u>
449811			5/6/2011
758578			5/6/2011
571788			5/6/2011
101107			5/6/2011
490845			5/6/2011
123975			5/6/2011
315084			5/6/2011
508635			5/6/2011
239760			5/6/2011
453589			5/6/2011

If more enrollment permission numbers are needed, e-mail the course details and number of additional permission numbers to the Office of the Registrar at: Registrar@hsc.unt.edu

1

BI Publisher in the Registrar: Permission Numbers

AFTER:

Enrollment Permission Numbers		
BIOS 5397.001 (Class Number: 5041)		
Adrignola, Matt Nolan	Enrollment Capacity: 30	Expiration Date: 12/20/2012
Permission Number	Student Name	
683389	_____	
294120	_____	
494727	_____	
493987	_____	
306999	_____	
378000	_____	
594945	_____	
715144	_____	
632040	_____	
313470	_____	

40 | Enrollment Permission Numbers 7/15/2014
If more permission numbers are needed please email Registrar@unthsc.edu

Questions?

Contact Information:

Emily Rhodes, Enrollment Services Assistant

Emily.Rhodes@unthsc.edu

817-735-2483

UNT | **HEALTH**TM
SCIENCE CENTER