



XML Publisher for PeopleSoft Enterprise

By

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About ERP Analysts

- ERP Analysts is a specialized application service provider headquartered in Dublin, Ohio
- Privately held since 1999, consistent and financially stable
- Over 200 W2 Employees dedicated to PeopleSoft, Oracle, SAP and other technologies
- 60% of Staff are Oracle Certified in PeopleSoft
- 90% of the revenues are generated by our own W2 staff
- ERP Analysts provides onsite and remote services at competitive rate



ERPA Services

- Project Management
- Solutions Implementations
- Application Major and Minor Upgrades in PeopleSoft
- Upgrade and Implementation Assessment
- Database Management and Administration
- Performance Tuning, Data Archiving and Purging
- Oracle License Reseller
- Staff Augmentation



ERPA Methodology

- **On-Site Methodology**
 - We bring expertise directly to you
 - Our staff visit your company in person
- **Remote Methodology**
 - On Time, On Budget deliveries with low cost
 - You can employ skilled consultants in larger numbers at lower costs and reach deliverables in less time
- **Hybrid Methodology**
 - Will have direct interaction between client and remote development team
 - Save on high consulting costs, travel expenditure



Remote Enterprise Support Team (R.E.S.T)

- Our managed solutions are delivered by dedicated staff with over 8 years of consultative experience and 10 or more engagements
- Provides access to a blend of resources
 - PM; Functional; Technical; DBA; System Admins
- Have a ability to use necessary skills as you need and when you want at a flat rate
- Maximize your billable hours with senior resources considered experts in their area
- On average our remote bill rates are 20 to 25% lower than our competitors



ERPA Awards and Certifications

- Oracle Platinum Partner
- Platinum Sponsor for HEUG
- Apprised at CMMI Maturity Level 3
- ISO 9001 & 27001 certified Corporate
- SBA 8(a) Certified Company
- GSA Schedule 70 holder (GS-35F-0474U)
- Minority Business Enterprise (MBE)
- Inc 500 Fastest growing privately held company
- Deloitte Fast 500 Company



Our Clientele . . .

Federal	State & County	Universities	Commercial & Internationals	
				
Department of Energy	County of Placer	University of North Carolina	Papa John's	Piggy Wiggly
				
Federal Aviation Administration	State of North Carolina	University of Southern Mississippi	CarMax	Fletcher Allen
				
B & W PANTEX	State of Florida	The University of Iowa	TSTT	Amazon
				
United Space Alliance	City of Seattle	North Dakota University	Google	Oracle
				
Battelle	Lower Colorado River Authority	Montclair State University	Alliant Energy	Gillard Sciences
				
WAPA	State of South Carolina	Chicago Public Schools	Microsoft	PCAOB
				
		TCNJ	Wendy's	Great Western Malting



Agenda

- XML Publisher overview
 - What is it and Where is it?
 - Benefits of XML Publisher?
 - How does it compare with SQR, Crystal?
 - How is it structured?
 - What is new in PeopleTools 8.50/8.51?
- Administration
 - Global settings
 - Security
- Reporting
 - XMLP Report using RTF Template?
 - XMLP Report using PDF Template?

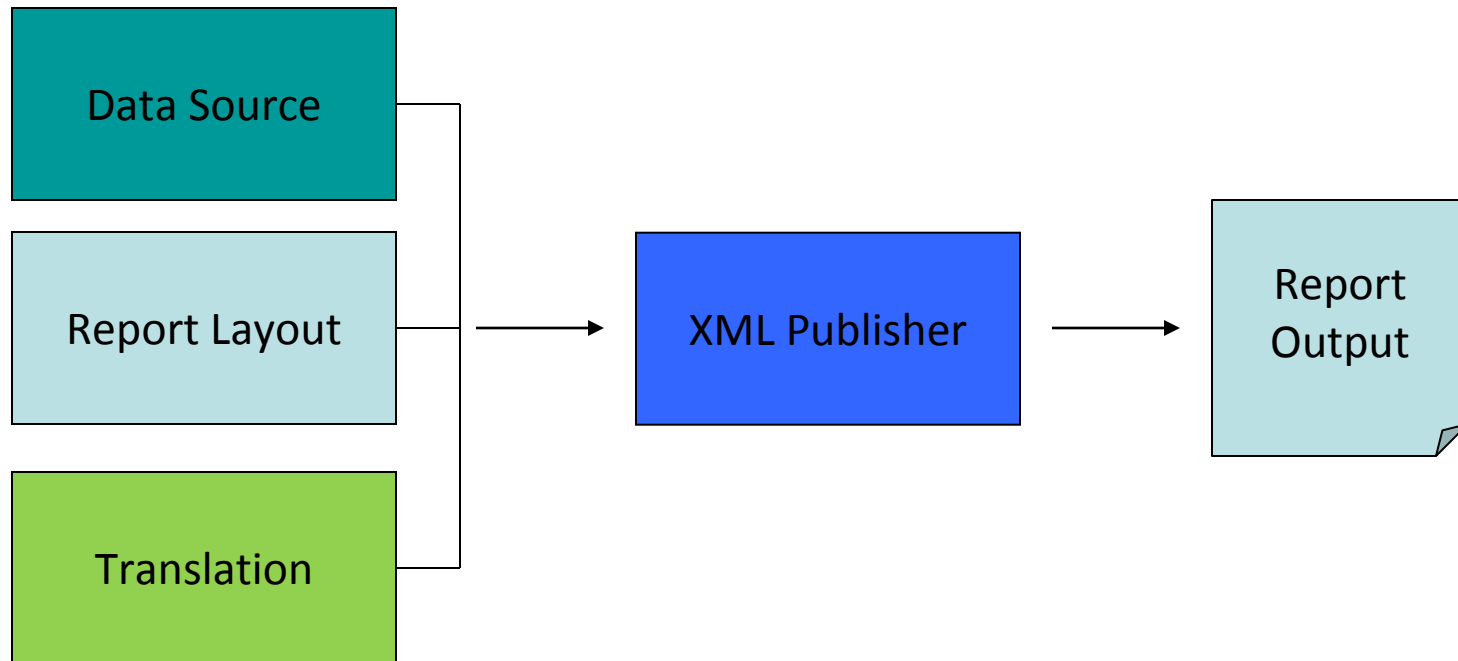
XML Publisher in PeopleSoft

- Oracle BI Publisher with select features.
- Released in PeopleTools 8.48.
- Standalone Java based technology that streamlines report generation.
- Template based reporting tool.
- Can create report templates using Windows applications like Microsoft Word, Adobe Acrobat.
- Generate multiple reports in many formats like PDF, RTF, HTML and EXCEL etc.



Benefits of XML Publisher

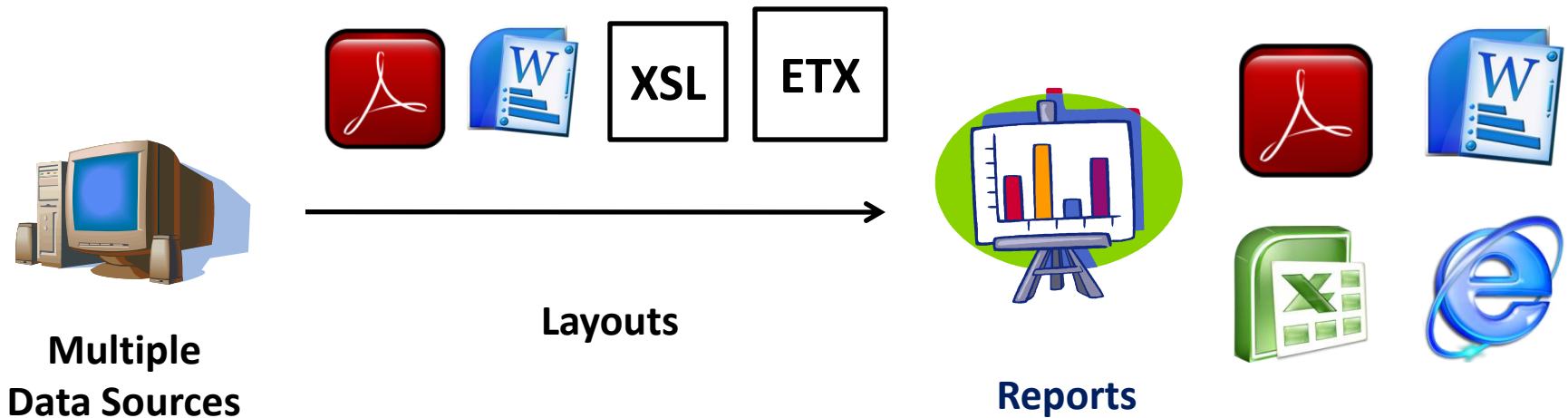
- Data source or data extraction, Report layout and translation are separate.



Benefits of XML Publisher

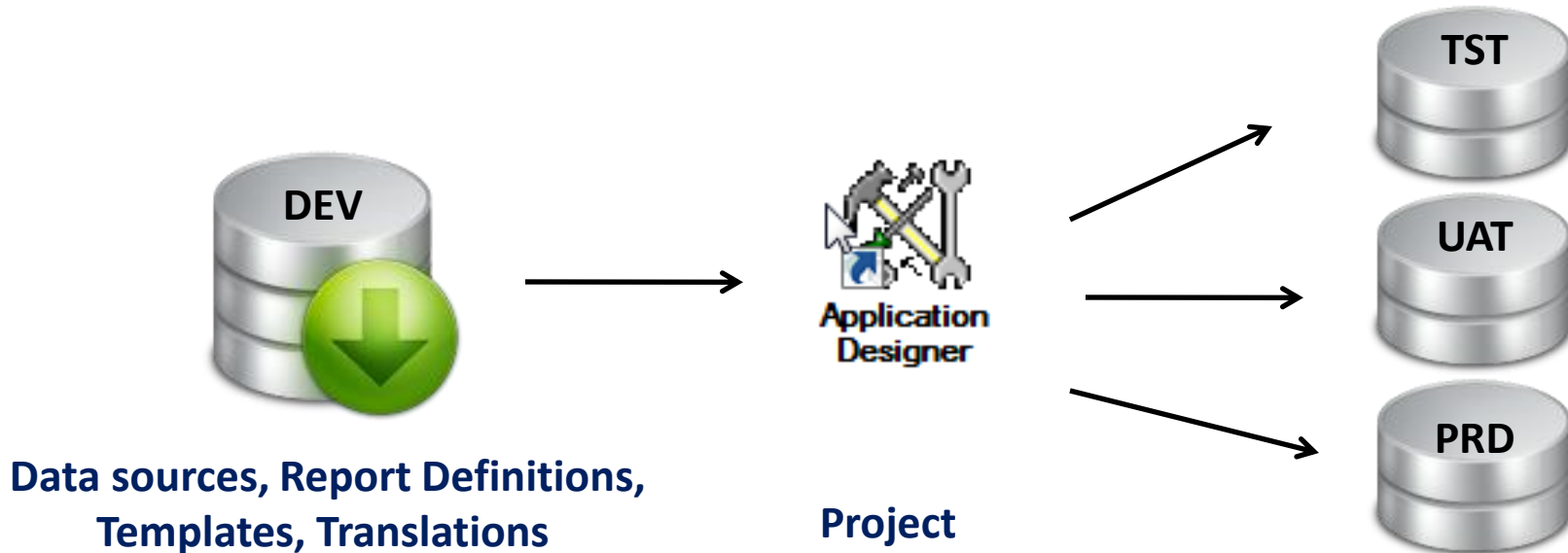
- Faster Development

- Business users can develop the layouts for the reports using windows tools like Word, Adobe etc.
- Developers create data sources.



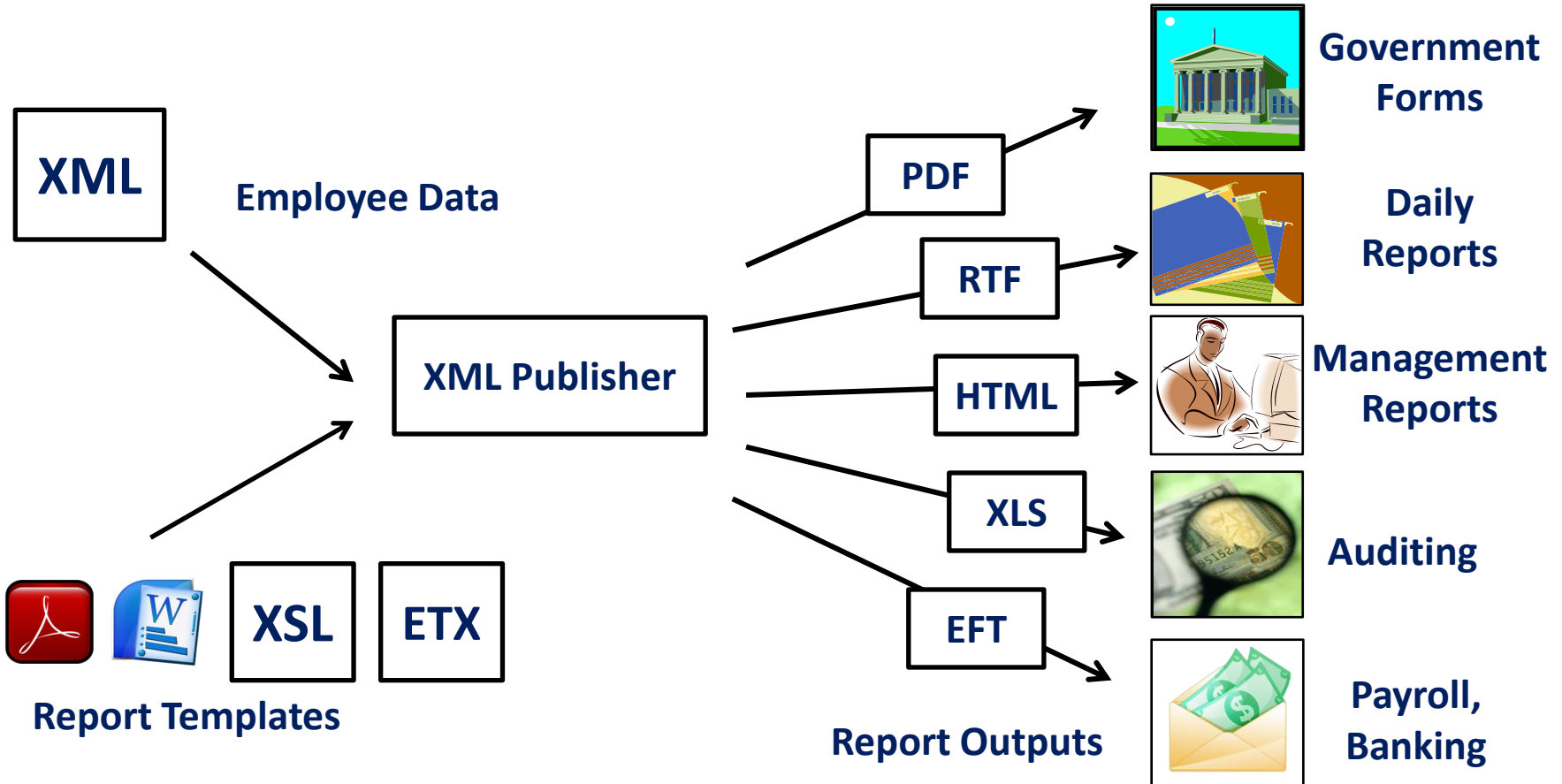
Benefits of XML Publisher

- Definitions within PeopleSoft environment.
 - XML Publisher definitions are stored within PeopleSoft database as PeopleTools objects.
 - Reduces additional file server maintenance.

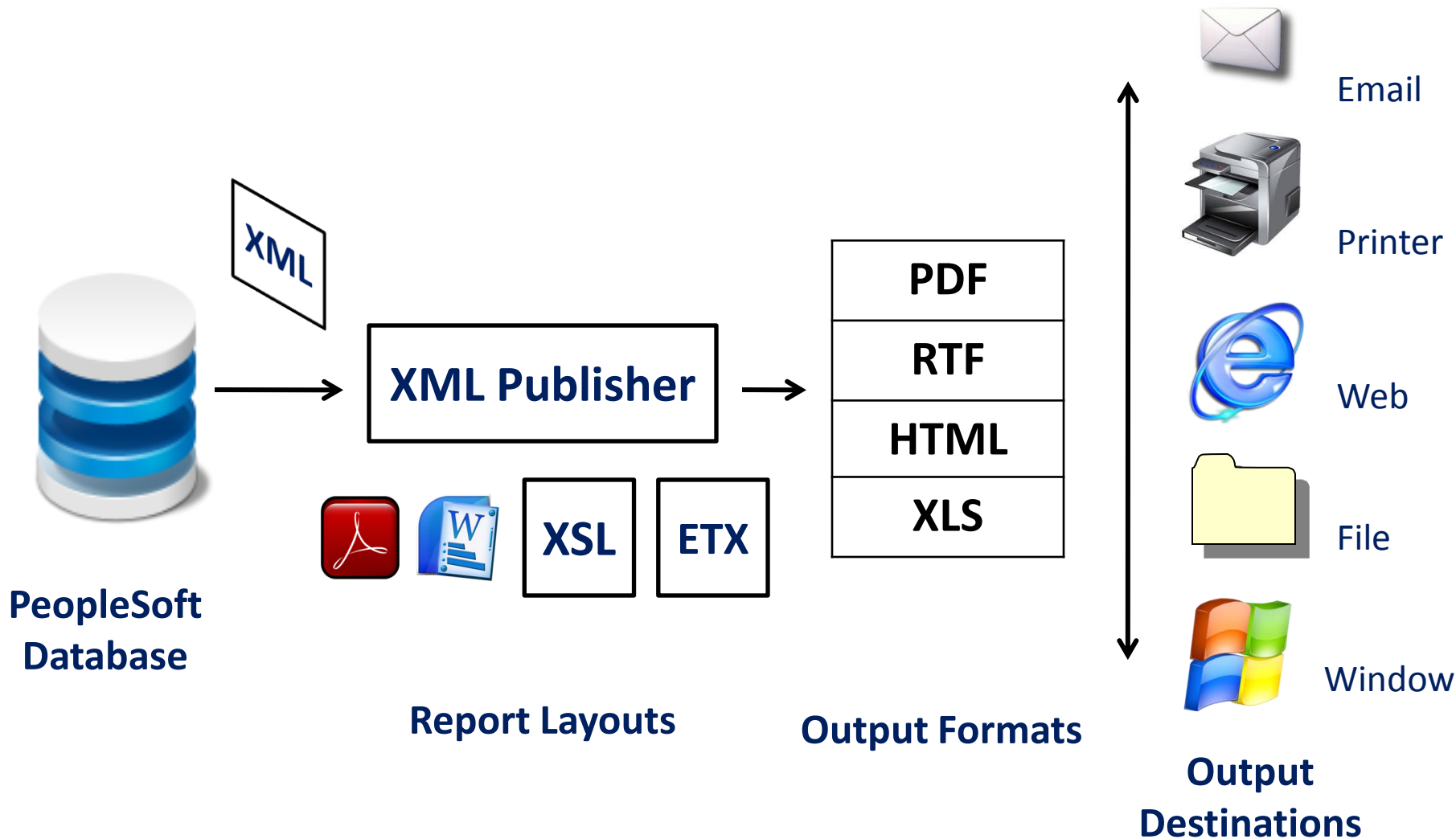


Benefits of XML Publisher

- Single data source for generating multiple reports.



Benefits of XML Publisher



Benefits of XML Publisher

- Multi language support.
- One template for multiple languages.

Favorites Main Menu > Reporting Tools > XML Publisher > Translations ←

Template Translations

Template ID: XRFWIN_1 **Effective Date:** 01/01/1900

Report Properties

Data Source Type: PS Query **Data Source ID:** XRFWIN
Report Name: XRFWIN **Description:** Cross Reference Window Listing

Template Properties

Description:

Base Language: English **Channel:**
Template File: xrfwin.rtf

Status: Active [Download](#) [Preview](#) [Generate Translatable File](#)

Translation Files

Active	XLIFF File	Language	Preview	Upload		
<input checked="" type="checkbox"/>	XRFWIN_FR.xlf	French	Preview	Upload	+	-

XML Publisher - Comparison

Criteria	XMLP	SQR	Crystal
Compatibility	Unix, NT	Unix, NT	NT
Data Source	Query, Connected Query, XML file, Rowset*, XML doc*.	Code	Query
Report Design	Word, PDF, XSL	Code	Crystal file
Report Definition	Database	SQR File	Crystal file
Report Formatting	Simple	Complex	Medium
Report Output	Pdf, Rtf, Html, XLS	Pdf, Html, Lis, Spf, CSV	Pdf, Rtf, Html, XLS

* - Deprecated data sources but backward compatibility is provided.



Structure of XML Publisher

- Phases in developing a XML Publisher report:
 - Setting Up XML Publisher.
 - Creating and registering data sources.
 - Creating Report templates.
 - Defining Report definitions.
 - Running the XML Publisher reports.



XML Publisher in 8.50/8.51

- Rowset and XML doc data sources deprecated.
- Connected query as a new data source.
- XML generated in C++ for query data source.
- Schema files no longer required for bursting.
- Email as an output option.
- “File name” field on the output page in Report Definition.
- Use “Alt XML” for previewing the templates.
- Full path mapping for use of repeating fields.

XML Publisher in 8.50/8.51

- New “Properties” tab to control report attributes for specific PeopleSoft Implementation.
- Enforce Unique burst value feature for bursting.
- Global properties page to define global properties.
- App engine PSXPCLEAN to clean XMLP metadata.



XML Publisher in 8.50/8.51

- Email as an output option for report outputs.

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

Report Name: XRFWIN

General

Runtime Output Format Options

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

Output Location

*Location: ←

File Name

XML Publisher in 8.50/8.51

- Descriptive file names for the report outputs.

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

Report Name: XRFWIN

General

Runtime Output Format Options

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

Output Location

*Location: Any

File Name: %ASD% %RID% ←

List | Explorer | **Administration** | Archives

View Reports For

User ID: PS Type: [Dropdown] Last

Status: [Dropdown] Folder: [Dropdown] Instance: [Text]

Report List Customize | Find | View All

Select	Report ID	Prcs Instance	Description	Request Date/Time
<input type="checkbox"/>	738	905	XRFWIN - 2011-02-22 XRFWIN.htm	02/22/2011 10:58:24AM



XML Publisher in 8.50/8.51

- Alternate XML for template preview.

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

Report Name: XRFWIN

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

Template ID: XRFWIN_1 Default Template + -

Description:

*Language Code: English Channel:

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

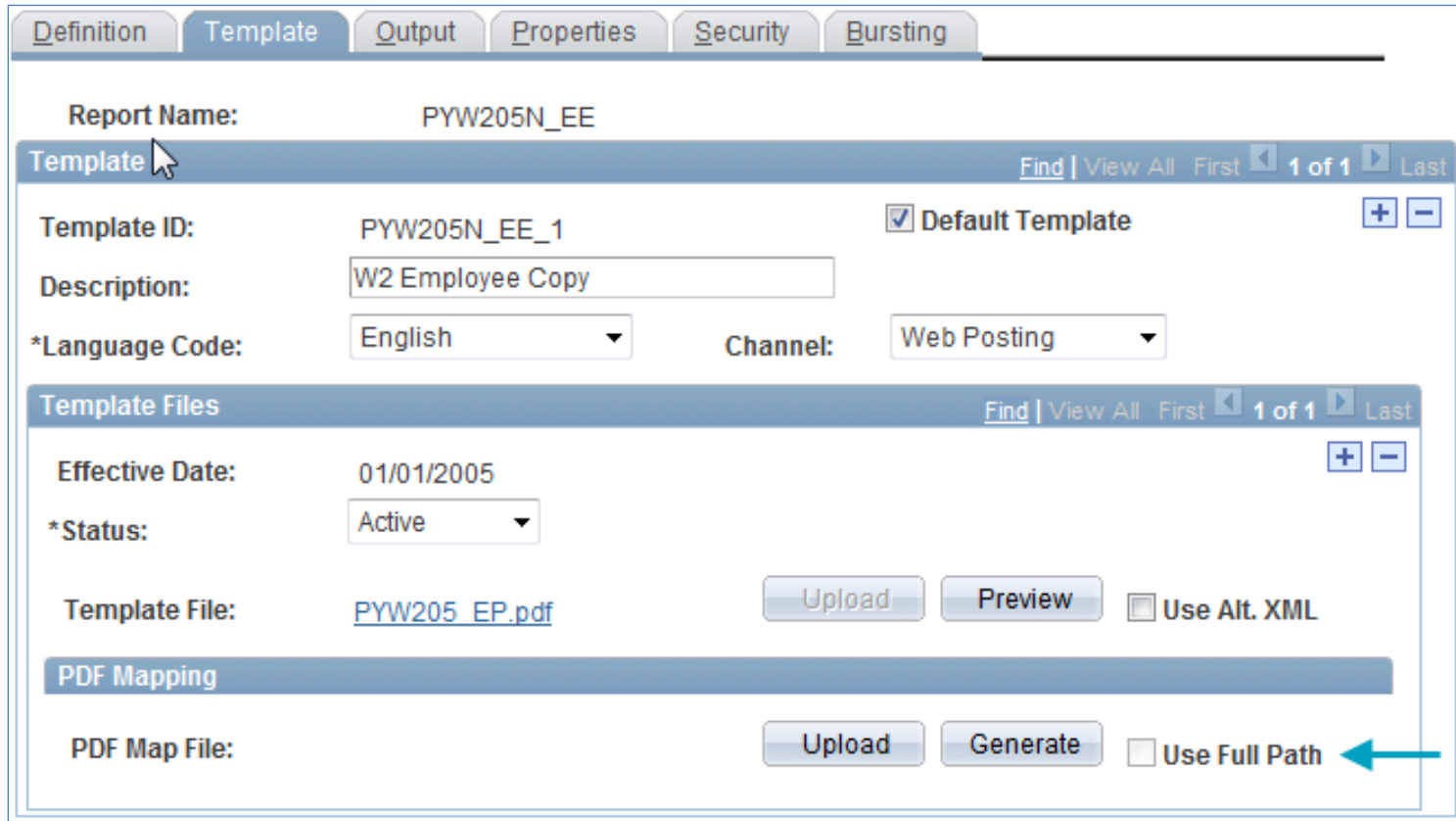
Effective Date: 01/01/1900 + -

*Status: Active

Template File: [xrfwin.rtf](#) Use Alt. XML ←

XML Publisher in 8.50/8.51

- Full path mapping to handle repeating fields in PDF templates.



The screenshot displays the XML Publisher configuration interface. The 'Template' tab is selected, showing the following details:

- Report Name:** PYW205N_EE
- Template ID:** PYW205N_EE_1 (marked as **Default Template**)
- Description:** W2 Employee Copy
- *Language Code:** English
- Channel:** Web Posting

The 'Template Files' section shows:

- Effective Date:** 01/01/2005
- *Status:** Active
- Template File:** PYW205_EP.pdf (with **Upload** and **Preview** buttons)
- Use Alt. XML

The 'PDF Mapping' section shows:

- PDF Map File:** (with **Upload** and **Generate** buttons)
- Use Full Path (indicated by a blue arrow)

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 - XMLP Report using PDF Template?

- Two types of properties.
 - System properties (xdo.cfg).
 - Non-system properties (PIA).

Level	Location
System Properties and fonts	xdo.cfg file (PS_HOME\appserv)
Global Properties	Reporting Tools, XML Publisher, Setup, Global Properties
Report Properties	Reporting Tools, XML Publisher, Report Definition, Properties
Runtime Properties	PeopleCode API (ReportDefn.SetRuntimeProperties)

Administration – XML Publisher Settings

- System properties and fonts are defined on the xdo.cfg file.
- Set the “system-temp-dir” based on the size of the reports generated for optimum performance.

```
<config version="1.0.0" xmlns="http://xmlns.oracle.com/oxp/config/">
  <properties>
    <!-- System level properties -->
    <property name="xslt-xdoparser">true</property>
    <property name="xslt-scalable">true</property>
    <property name="system-cachepage-size">50</property>
    <property name="system-temp-dir"></property>
  </properties>

  <!--<font>-->
  <!--<font family="3 of 9 Barcode" style="normal" weight="normal">-->
    <!--<truetype path="C:\WINNT\Fonts\3of9.ttf" />-->
    <!--</font>-->
  <!--</font>-->
</config>
```

Administration – Global Properties

- Shared by all reports and overrides the properties on xdo engine.

Favorites | Main Menu > Reporting Tools > XML Publisher > Setup > Global Properties ←

Global Properties



Global Properties

Property Group: PDF Output ▼

Property	Prompt	Default
pdf-compression	True ▼	True
pdf-hide-menubar	False ▼	False
pdf-hide-toolbar	False ▼	False
pdf-replace-smartquotes	True ▼	True

Administration – Report Properties

- Properties for a single report and override global properties.

Favorites | Main Menu > Reporting Tools > XML Publisher > Report Definition  

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

Report Name: XRFWIN

Report Properties

Property Group: PDF Output ▼

Property Settings	Property	Value	Default
	pdf-compression	▼	True
	pdf-hide-menubar	▼	False
	pdf-hide-toolbar	▼	False
	pdf-replace-smartquotes	▼	True

FO Processing
HTML Output
PDF Output
PDF Security
PDF Template
PeopleTools Settings
RTF Output
RTF Template

XML Publisher - Security


- XML Publisher Security involves three categories:
 - Defining Reports: Query security determines which queries the users have access to use and create reports. Report category defines who can view and edit XML Publisher report definitions.
 - Running Reports: Application security and Process Scheduler security determine who can run reports. XML Publisher does not provide additional security beyond what PeopleSoft currently provides.
 - Viewing Reports: Security for viewing the reports is controlled by both the Distribution ID field on the Report Definition, Security page. Additional viewing security can also be defined for bursted reports on the Report Definition, Bursting page using views.

XML Publisher - Security


- XML Publisher access is controlled by permission lists and role assignment.
- XMLP Report Developer role (PTPT 2600) is for report developers. Users assigned to this role have access to all XML Publisher components including the bursting setup in Report definition.
- XMLP Power User role (PTPT 2500) is for power users and gives access to query data sources and ad hoc reporting capabilities.

XML Publisher - Security

Report category is required attribute on all report definitions and it applies row level security to the data on those components.

Favorites | Main Menu > Reporting Tools > XML Publisher > Setup > Report Category 

Report Category




Report Category ID: ALLUSER 

Properties

Description:

*Object Owner ID:

Report Definition Editors and Viewers View All | First 1-3 of 3 Last

*ID Type	*Security ID	Description	Read Only		
Role ▼	<input type="text" value="OD PeopleSoft User"/> 	On Demand PeopleSoft User	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Role ▼	<input type="text" value="OD PeopleSoft User No Passwd"/> 	OD PeopleSoft User No Password	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
Role ▼	<input type="text" value="PeopleSoft User"/> 	PeopleSoft User	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>

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 - XMLP Report using PDF Template?

- Steps involved in creating a XML Publisher report using Connected Query :
 - Create a connected query.
 - Create a data source.
 - Create a RTF report template.
 - Create a report definition.
 - Running, viewing and testing the report.

- Can also use Connected Query Quick Start to create a connected query.

Favorites | Main Menu > Reporting Tools > Connected Query > Connected Query Manager

Connected Query Manager

Connected Query: ERP_COMP_DATA

Public *Status: Active Properties

Description

Description: Employee Salary Data



Comments: Employee Salary Data

Parent Query Selection

Parent Query: ERP_PERS_DATA View Query

Connected Query Structure		Field1
ERP_PERS_DATA		A.EMPLID
ERP_JOB_DATA		A.EMPLID


- Save the XML file for report template design.

Favorites Main Menu > Reporting Tools > XML Publisher > Data Source  

Data Source

Data Source Type: Connected Query
Data Source ID: ERP_COMP_DATA

Data Source Properties

Description:  Active

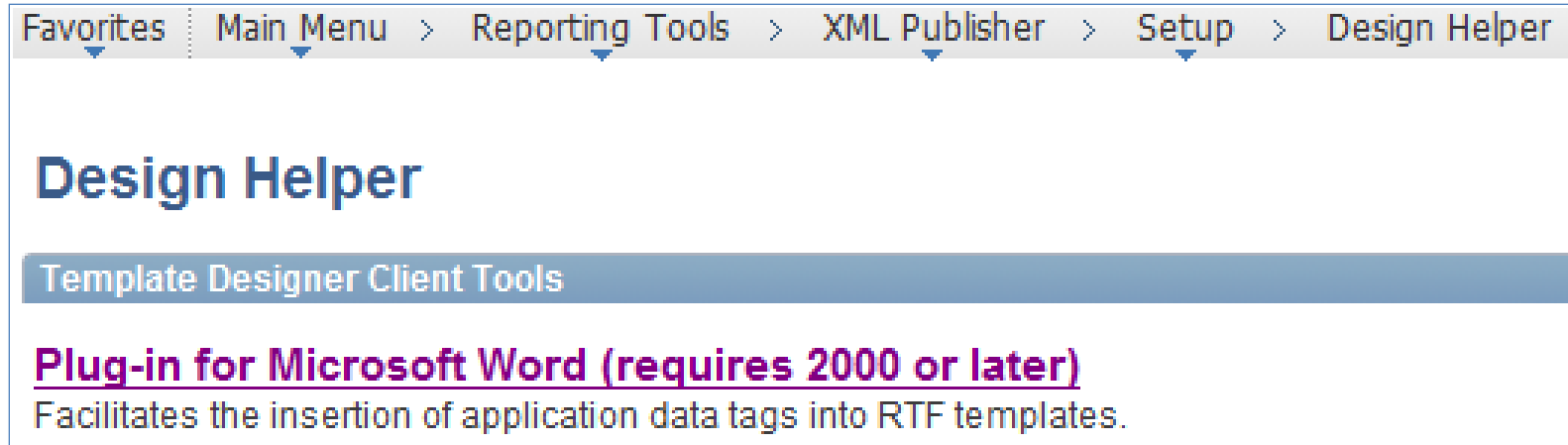
Object Owner ID:

Registered Date/Time: 02/22/11 3:15:16PM **Registered By:** PS
Last Update Date/Time: 02/23/11 11:20:09AM **Updated By:** PS

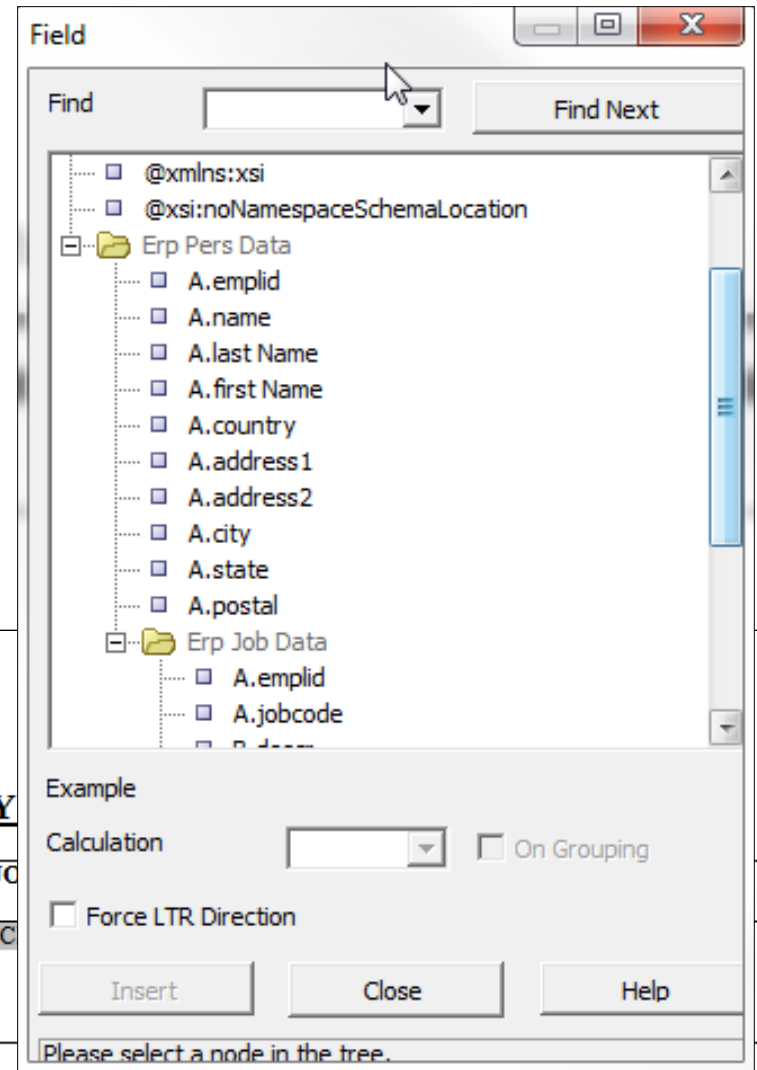
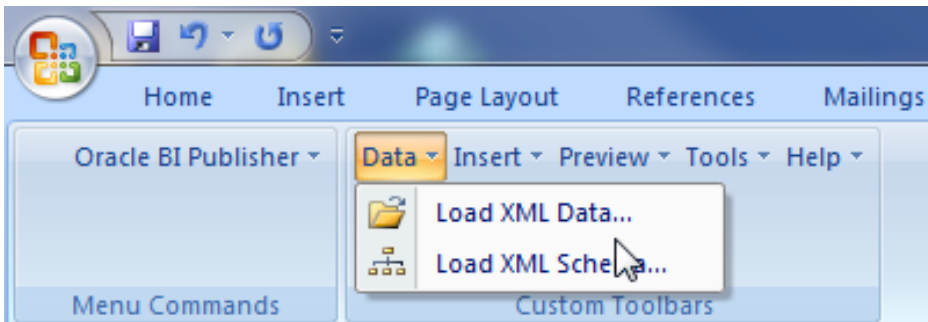
Related Files

File Type	File	Generate File	Or	Upload File
Sample Data File	ERP_COMP_DATA.XML	Regenerate	Or	Upload

- Install the “Design Helper” for word to create RTF templates.





Creating an XMLP Report – Connected Query



EMPLOYEE SALARY

NAME	EMLID	ADDRESS	JOBCODE	JOB
A.NAME	A.EMPLID	A.ADDRESS1, A.ADDRESS2, A.CITY, A.STATE, A.POSTAL, A.COUNTRY	A.JOBCODE	B.DESCR

Creating an XMLP Report – Connected Query

Favorites Main Menu > Reporting Tools > XML Publisher > Report Definition  

Definition Template Output Properties Security Bursting

Report Name: ERP_SAL_RPT

Data Source


Data Source Type: Connected Query


Data Source ID: ERP_COMP_DATA

Data Source Description: Employee Salary Data


Report Properties

Report Description:

***Report Status:** 

***Report Category ID:**  All PeopleSoft User

Object Owner ID:

***Template Type:** 

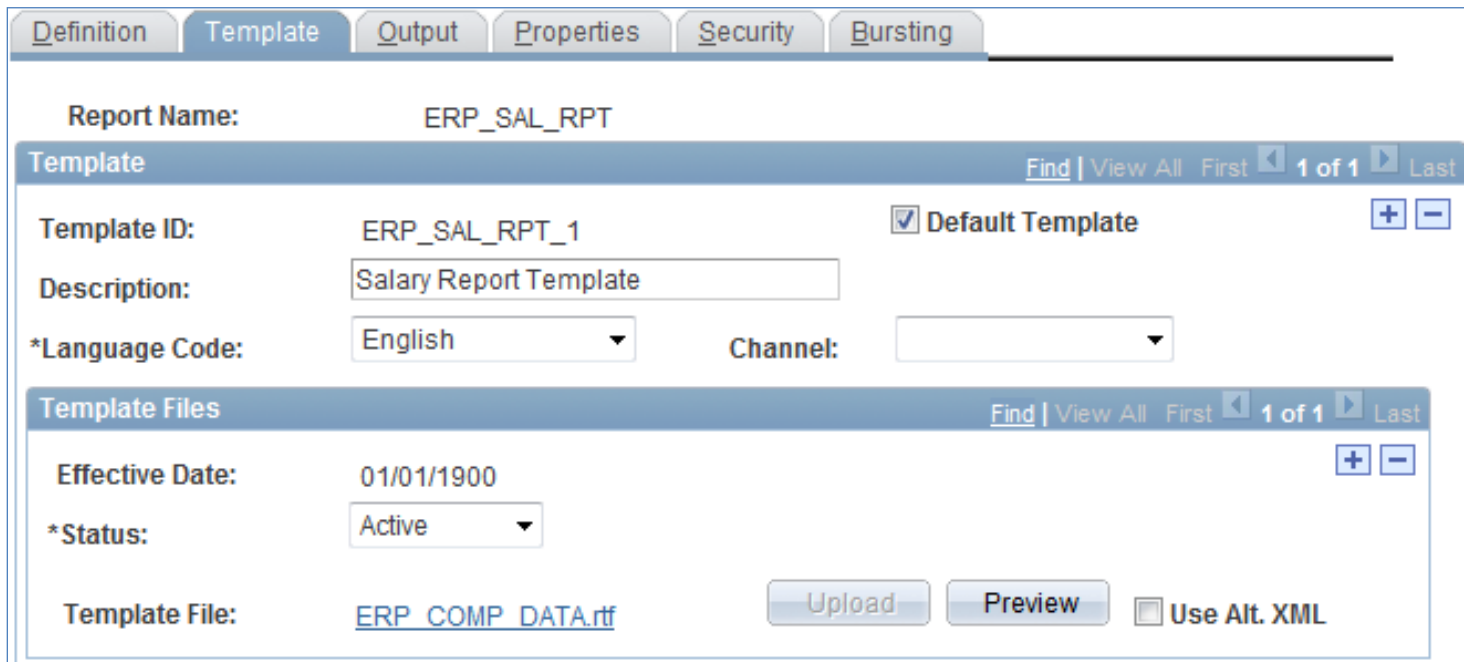
Retention Days:

Registered Date/Time: 02/22/2011 3:41:21PM **Registered By:** PS

Updated Date/Time: 02/23/2011 9:58:43AM **Updated By:** PS

Creating an XMLP Report – Connected Query

- Use Alt XML option for more realistic preview of the report with original data.
- At least one default template needs to be associated with the definition to save it.



The screenshot shows a software interface for configuring an XMLP report. It features several tabs: Definition, Template, Output, Properties, Security, and Bursting. The 'Template' tab is active, showing the following details:

- Report Name:** ERP_SAL_RPT
- Template ID:** ERP_SAL_RPT_1 (with a checked 'Default Template' checkbox)
- Description:** Salary Report Template
- *Language Code:** English (dropdown menu)
- Channel:** (empty dropdown menu)
- Template Files:** A sub-section with:
 - Effective Date:** 01/01/1900
 - *Status:** Active (dropdown menu)
 - Template File:** ERP_COMP_DATA.rtf

At the bottom of the configuration area, there are buttons for 'Upload' and 'Preview', and a checkbox labeled 'Use Alt. XML'.

Creating an XMLP Report – Connected Query

- Output options will determine what output type and output format prompts will be available on Process Scheduler Request page and Query Report Viewer for query based reports.
- Descriptive output file name feature and email as an output location.

Definition
Template
Output
Properties
Security
Bursting

Report Name: ERP_SAL_RPT

General

Runtime Output Format Options

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

Output Location

*Location: Any ←


File Name

- Properties page is used to define report level settings for different property groups.
- Properties set here will override the global properties.

Definition
Template
Output
Properties
Security
Bursting

Report Name: ERP_SAL_RPT

Report Properties

Property Group: PDF Output ▼ 

Property Settings

Property	Prompt	Default
pdf-compression	▼	True
pdf-hide-menubar	▼	False
pdf-hide-toolbar	▼	False
pdf-replace-smartquotes	▼	True

Creating an XMLP Report – Connected Query

- Security page is used to set up who can view web-posted output in the Report Manager repository and through the XML Publisher Report Repository Search page.

Definition
Template
Output
Properties
Security
Bursting

Report Name: ERP_SAL_RPT

Report Viewers

Allow viewer ID assignment at report runtime

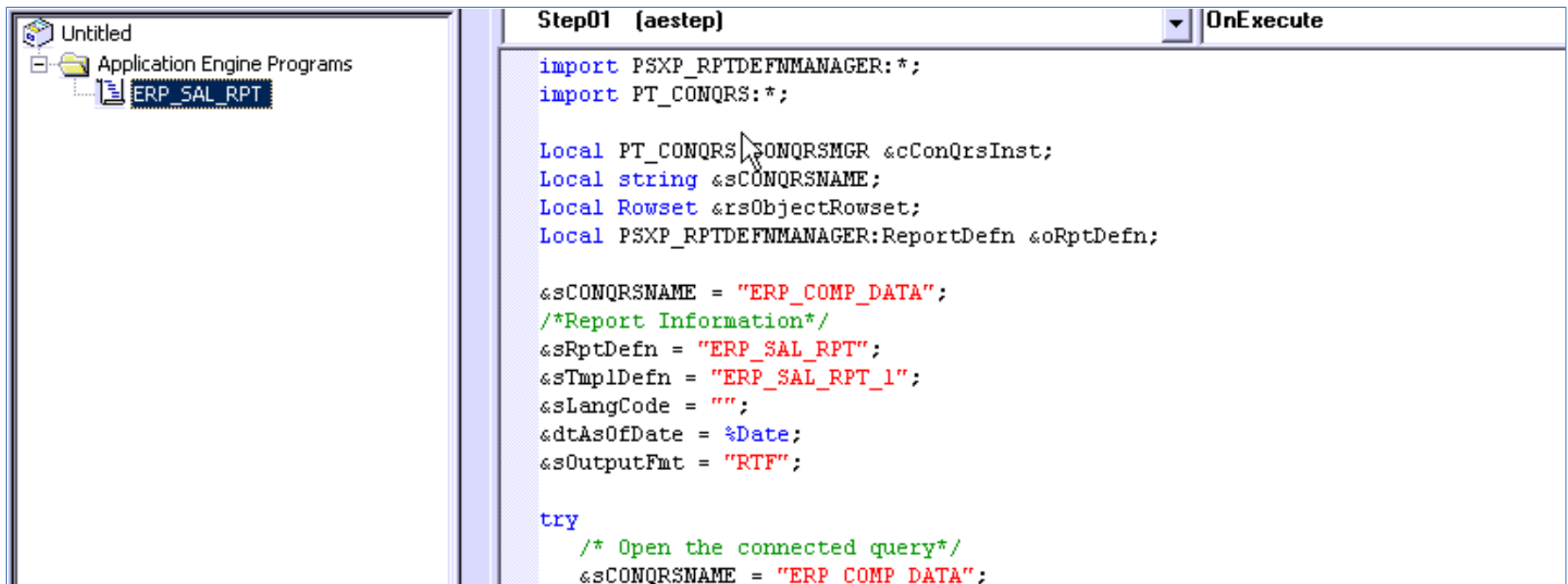
Report Viewers View All | First 1 of 1 Last

ID Type	Distribution ID	Description		
User ▼	PS <input type="text"/>	[PS] Peoplesoft Superuser	+	-



Creating an XMLP Report – Connected Query

- Create an Application Engine with same name as the report name.
- Use Connected query PeopleCode API's to use it as a data source.






The screenshot shows the PeopleSoft Application Engine editor. On the left, a tree view shows 'Application Engine Programs' with 'ERP_SAL_RPT' selected. The main editor area shows the following code for 'Step01 (aestep)' in 'OnExecute' mode:


```
import PSXP_RPTDEFNMANAGER:*;  
import PT_CONQRS:*;  
  
Local PT_CONQRS|SONQRSMGR &cConQrsInst;  
Local string &sCONQRSNAME;  
Local Rowset &rsObjectRowset;  
Local PSXP_RPTDEFNMANAGER:ReportDefn &oRptDefn;  
  
&sCONQRSNAME = "ERP_COMP_DATA";  
/*Report Information*/  
&sRptDefn = "ERP_SAL_RPT";  
&sTplDefn = "ERP_SAL_RPT_1";  
&sLangCode = "";  
&dtAsOfDate = %Date;  
&sOutputFmt = "RTF";  
  
try  
    /* Open the connected query*/  
    &sCONQRSNAME = "ERP COMP DATA";
```

Creating an XMLP Report – Connected Query

- Create a XML Publisher process type for the report.

Favorites | Main Menu > PeopleTools > Process Scheduler > Processes  

Process Definition | Process Definition Options | Override Options | Destination 

Process Type: XML Publisher 


Name: ERP_SAL_RPT

*Description: API Aware

Long Description: Restart Enabled?


Read Only

*Priority: Retention Days: Retry Count:

*Process Category:  Default Category


Creating an XMLP Report – Connected Query

- Report is run from System Process Request page.


Favorites Main Menu > PeopleTools > Process Scheduler > System Process Requests 

Process Scheduler Request

User ID: PS Run Control ID: SEC

Server Name: Run Date: 02/23/2011 

Recurrence: Run Time: 10:52:41AM

Time Zone: 

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input type="checkbox"/>	Cross Reference Window Listing	XRFWIN	XML Publisher	Web	HTM	Distribution
<input checked="" type="checkbox"/>	Employee Salary Report	ERP_SAL_RPT	XML Publisher	Web	RTF	Distribution



Creating an XMLP Report – Connected Query

- Check for the status of the report on Process Monitor.
- XML Publisher report output is generated on Report Manager.

Favorites | Main Menu > PeopleTools > Process Scheduler > Process Monitor ←

Process List | Server List

View Process Request For

User ID: Type: Last Days

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Process List Customize | Find | View All | First 1-7 of 7 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	926		XML Publisher →	ERP_SAL_RPT	PS	02/23/2011 10:09:51AM PST	Success	Posted	Details
<input type="checkbox"/>	919		Application Engine	PSXP_DIRCLN	PS	02/23/2011 1:00:58AM PST	Success	Posted	Details



Creating an XMLP Report – Connected Query

- Security defined on “Security” tab of the Report definition determines who can view the reports.

Favorites | Main Menu > Reporting Tools > Report Manager ←

List | Explorer | Administration | Archives

View Reports For

User ID: Type: Last Days

Status: Folder: Instance: to:

Report List [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-7 of 7 | [Last](#)

Select	Report ID	Prcs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	765	926	ERP_SAL_RPT - ERP_SAL_RPT.rtf	02/23/2011 10:10:46AM	Rich Text File (*.rtf)	Posted	Details

EMPLOYEE SALARY REPORT



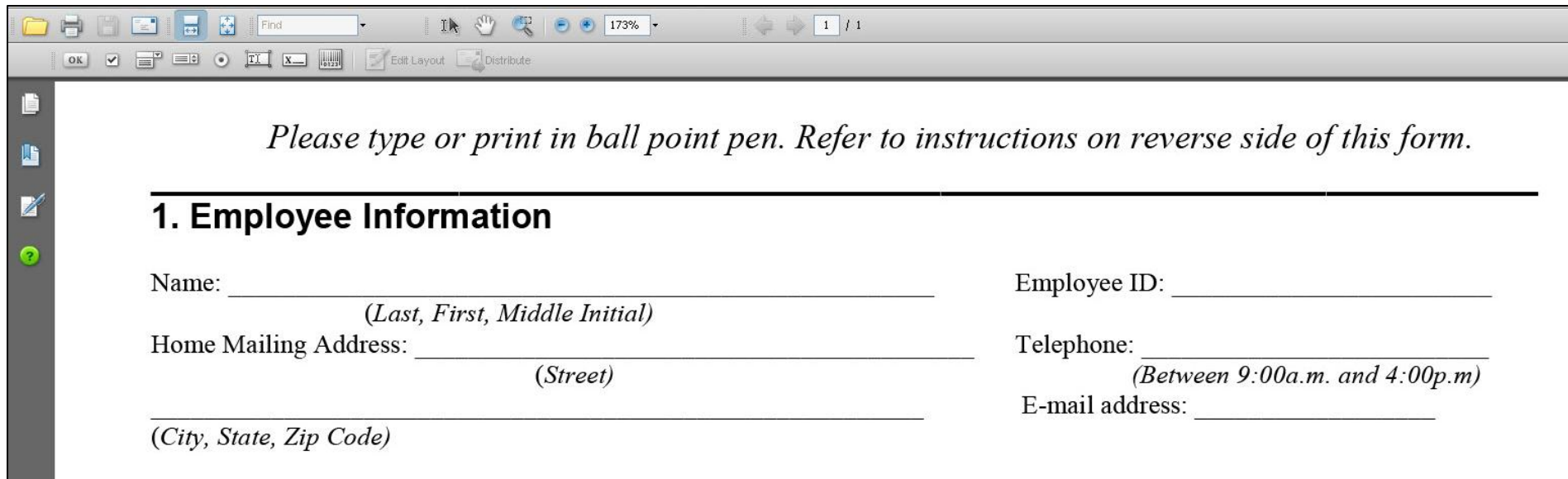
NAME	EMLID	ADDRESS	JOBCODE	JOBTITLE	HR STATUS	EMP TYPE	GRADE	SALARY(\$)
Johnson,Mark	KUC001	Lane 1, Main 1, Los Angeles, CA, 88888, USA	110000	Accountant	A	F	005	150000
Salinger,Claudia	KUD001	2456 Fillmore St, #130,, San Francisco, CA, 94121, USA	130020	Agent-HR Help Desk L1	A	F		35000
MacPhee,Todd	KUD002	2783 Shannon, , Dublin, CA, 94585, USA	130020	Agent-HR Help Desk L1	A	F	003	34000
DeAngelis,George	KUD003	2134 Lamar Loop,, Castro Valley, CA, 94552, USA	130025	Agent-HR Help Desk L2	A	F	004	41000
Rosenberg,Melissa	KUD004	17 Wood Street, #302,, San Francisco, CA, 94118, USA	130025	Agent-HR Help Desk L2	A	F	004	42500
Jackson,Carmella	KUD005	1871 Arbor Ave, , Belmont, CA, 94002, USA	130030	Agent-HR Help Desk L3	A	F	005	48000

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Creating an XMLP Report – PDF Template

- XML Publisher supports Adobe Acrobat 5.0 (PDF specification version 1.4) only.
- Make sure you save your file as Adobe Acrobat 5.0 compatible and **DO NOT** use software other than Adobe for creating PDF report templates.
- If you are using Adobe Acrobat Professional 6.0 (or later), use the **Reduce File Size Option** (from the **Document** menu) to save your file as Adobe Acrobat 5.0 compatible.



The screenshot shows a PDF form titled "Please type or print in ball point pen. Refer to instructions on reverse side of this form." The form is displayed in Adobe Acrobat Professional 6.0. The form content is as follows:

Please type or print in ball point pen. Refer to instructions on reverse side of this form.

1. Employee Information

Name: _____
(Last, First, Middle Initial)

Home Mailing Address: _____
(Street)

(City, State, Zip Code)

Employee ID: _____

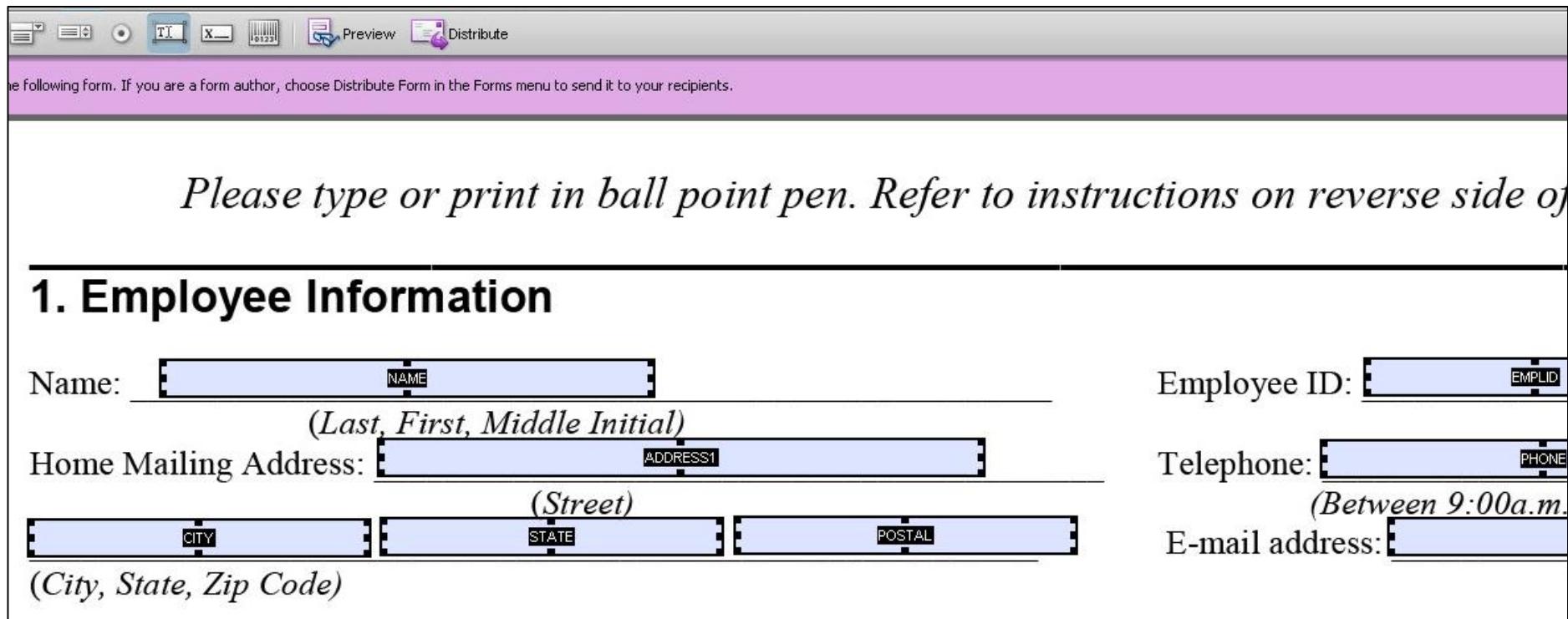
Telephone: _____
(Between 9:00a.m. and 4:00p.m)

E-mail address: _____



Creating an XMLP Report – PDF Template

- Create placeholders for all the fields and name them accordingly.
- Save the file which will be used as a template in creating the report definition.



Preview Distribute

the following form. If you are a form author, choose Distribute Form in the Forms menu to send it to your recipients.

Please type or print in ball point pen. Refer to instructions on reverse side of

1. Employee Information

Name: Employee ID:

(Last, First, Middle Initial)

Home Mailing Address: Telephone:

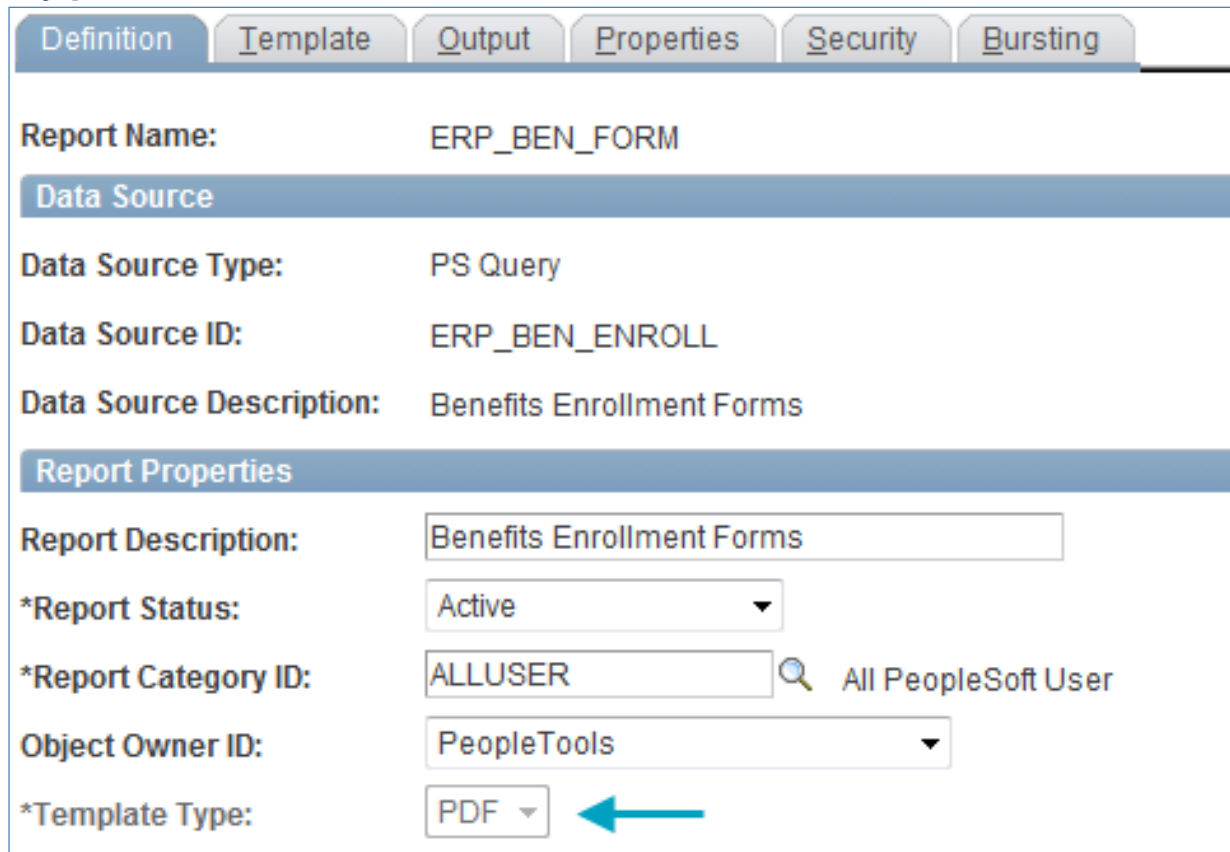
(Street) *(Between 9:00a.m.*

E-mail address:

(City, State, Zip Code)

Creating an XMLP Report – PDF Template

- Create a report definition with PS Query as the data source.
- Template type is PDF.

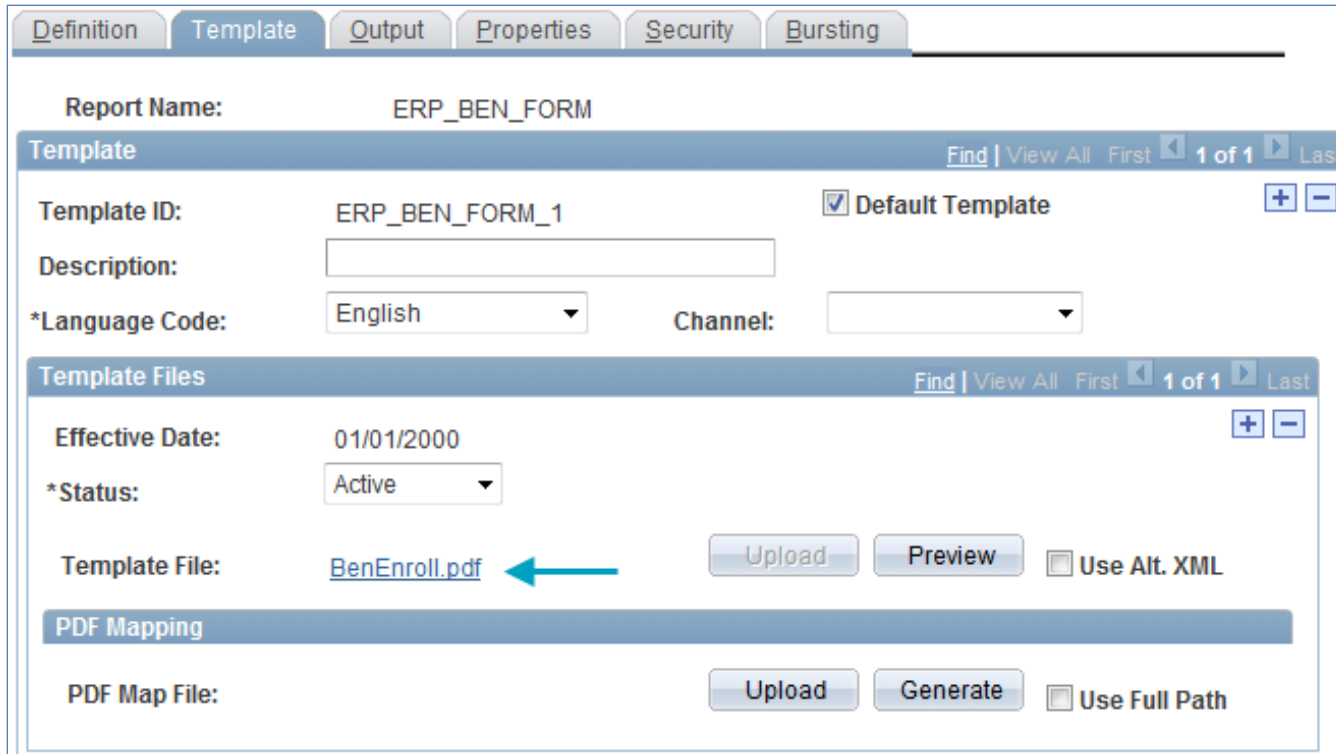


The screenshot shows the configuration interface for an XMLP Report. The interface has several tabs: Definition, Template, Output, Properties, Security, and Bursting. The 'Definition' tab is selected. The configuration is as follows:

Report Name:	ERP_BEN_FORM
Data Source	
Data Source Type:	PS Query
Data Source ID:	ERP_BEN_ENROLL
Data Source Description:	Benefits Enrollment Forms
Report Properties	
Report Description:	<input type="text" value="Benefits Enrollment Forms"/>
*Report Status:	<input type="text" value="Active"/>
*Report Category ID:	<input type="text" value="ALLUSER"/> All PeopleSoft User
Object Owner ID:	<input type="text" value="PeopleTools"/>
*Template Type:	<input type="text" value="PDF"/> ←

Creating an XMLP Report – PDF Template

- Two files that need to be uploaded in Template files section.
- Upload the PDF template file that was created by Clicking on “Upload” button.

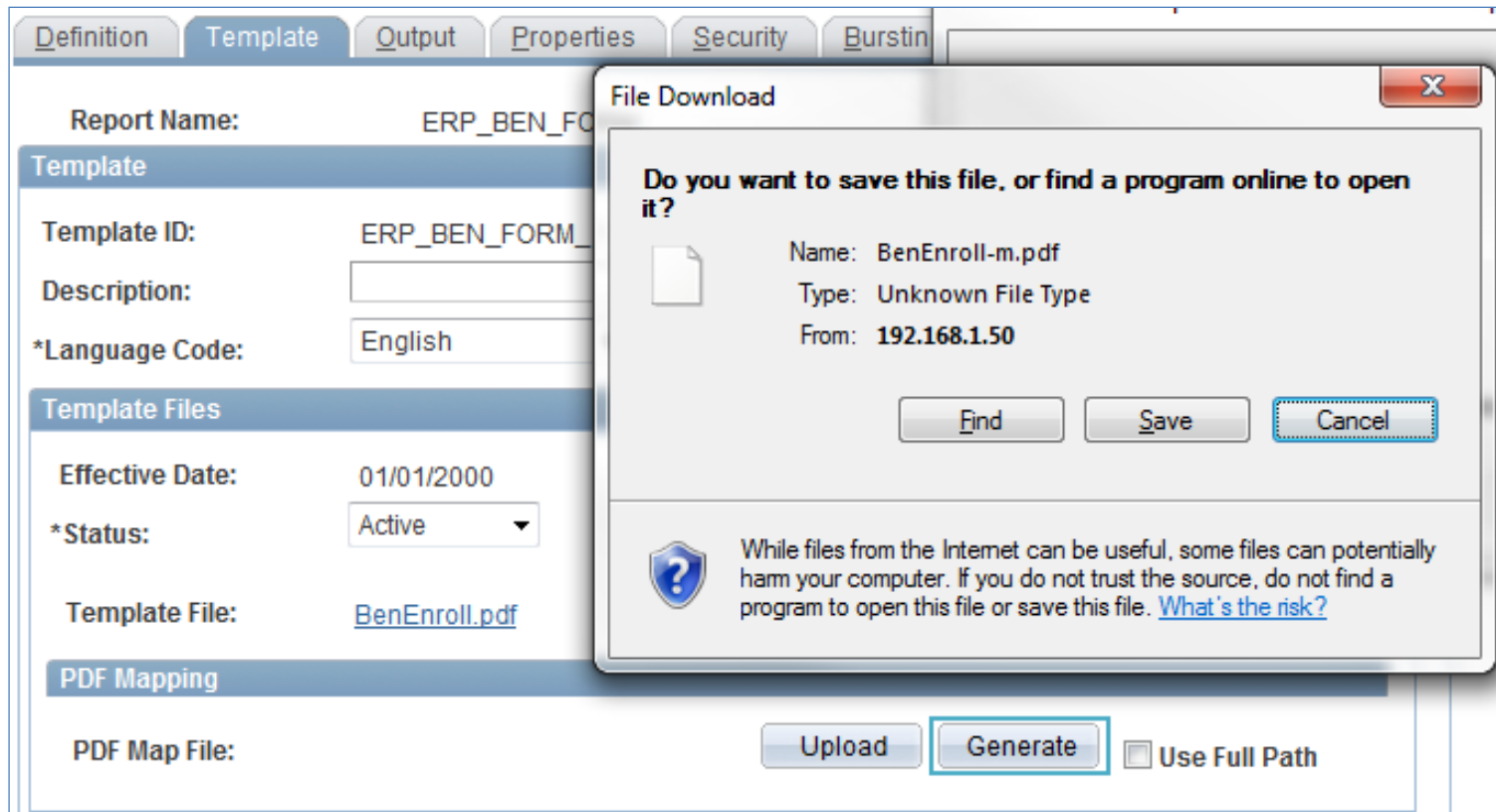


The screenshot shows a web-based configuration interface for an XMLP Report. The interface is divided into several sections:

- Definition** (selected tab):
 - Report Name: ERP_BEN_FORM
- Template** section:
 - Template ID: ERP_BEN_FORM_1
 - Description: (empty text box)
 - *Language Code: English (dropdown menu)
 - Channel: (empty dropdown menu)
 - Buttons: +, -
- Template Files** section:
 - Effective Date: 01/01/2000
 - *Status: Active (dropdown menu)
 - Template File: [BenEnroll.pdf](#) (with a blue arrow pointing to it)
 - Buttons: Upload, Preview
 - Checkbox: Use Alt. XML
- PDF Mapping** section:
 - PDF Map File: (empty text box)
 - Buttons: Upload, Generate
 - Checkbox: Use Full Path

Creating an XMLP Report – PDF Template

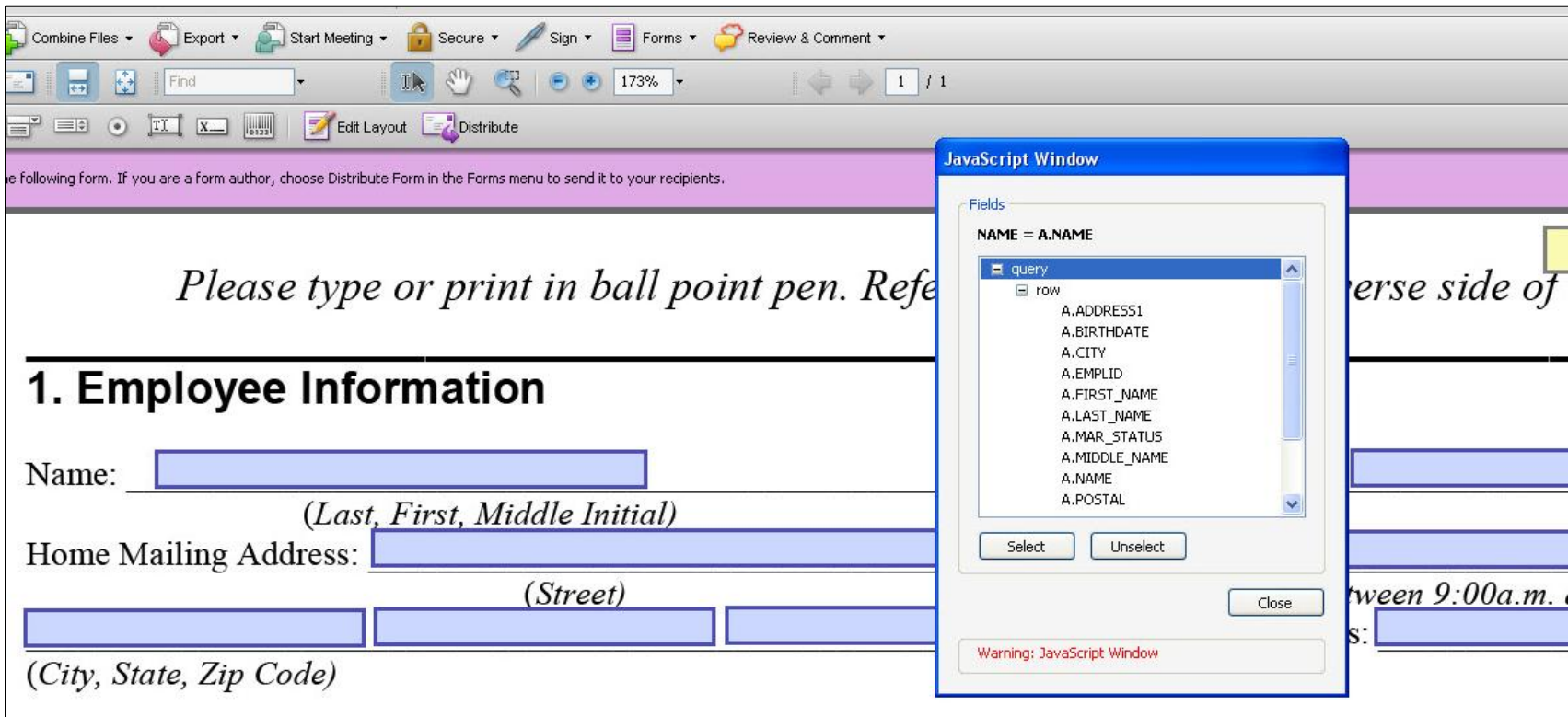
- Click “Generate” to generate a file suitable for mapping the data elements.



The screenshot displays the 'Template' tab of a software interface. The main window shows fields for 'Report Name' (ERP_BEN_FO), 'Template ID' (ERP_BEN_FORM), 'Description', '*Language Code' (English), 'Effective Date' (01/01/2000), '*Status' (Active), and 'Template File' (BenEnroll.pdf). A 'PDF Mapping' section is partially visible at the bottom. A 'File Download' dialog box is overlaid on the main window, asking 'Do you want to save this file, or find a program online to open it?'. The dialog provides details for a file named 'BenEnroll-m.pdf' with an 'Unknown File Type' from IP address '192.168.1.50'. It includes 'Find', 'Save', and 'Cancel' buttons. A security warning at the bottom of the dialog states: 'While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not find a program to open this file or save this file. [What's the risk?](#)' The 'Generate' button in the main window is highlighted with a blue border.

Creating an XMLP Report – PDF Template

- A Java script window is embedded into template file.
- Click on the field and a pop-up appears with all fields in the data source.
- Map the field by selecting the field on the java script window and Click “Select”.



The screenshot shows a PDF form editor interface. The main form contains the following text and fields:

Please type or print in ball point pen. Refer to the reverse side of this form.

1. Employee Information

Name:
(Last, First, Middle Initial)

Home Mailing Address:
(Street)

(City, State, Zip Code)

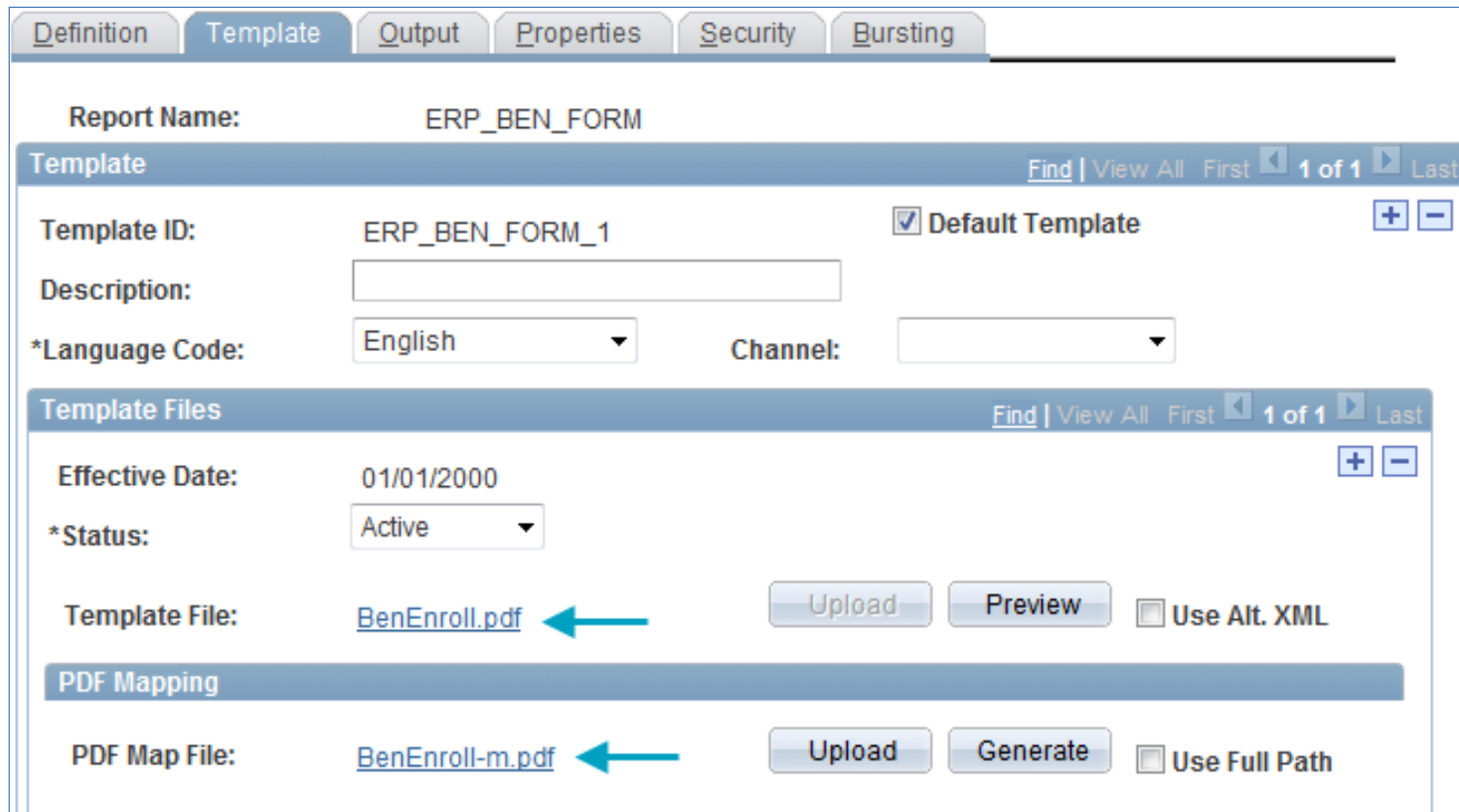
The JavaScript Window is open, displaying a list of fields from a data source named 'query':

- A.ADDRESS1
- A.BIRTHDATE
- A.CITY
- A.EMPLID
- A.FIRST_NAME
- A.LAST_NAME
- A.MAR_STATUS
- A.MIDDLE_NAME
- A.NAME
- A.POSTAL

Buttons for 'Select', 'Unselect', and 'Close' are visible. A warning message at the bottom of the window reads: 'Warning: JavaScript Window'.

Creating an XMLP Report – PDF Template

- Upload the mapped file and save the Report Definition.
- Report output for PDF templates is PDF only.



The screenshot shows a web-based configuration interface for an XMLP report. At the top, there are tabs for **Definition**, **Template**, **Output**, **Properties**, **Security**, and **Bursting**. The **Template** tab is active.

Report Name: ERP_BEN_FORM

Template section:

- Template ID:** ERP_BEN_FORM_1 **Default Template** (+) (-)
- Description:** [Empty text box]
- *Language Code:** English (dropdown) **Channel:** [Empty dropdown]

Template Files section:


- Effective Date:** 01/01/2000 (+) (-)
- *Status:** Active (dropdown)
- Template File:** [BenEnroll.pdf](#) (with a blue arrow pointing to it) **Use Alt. XML**

PDF Mapping section:

- PDF Map File:** [BenEnroll-m.pdf](#) (with a blue arrow pointing to it) **Use Full Path**

Creating an XMLP Report – PDF Template

- Use the Query report viewer to view the report.
- Click on the “View Report” link to view the report in PDF format.

Favorites Main Menu > Reporting Tools > XML Publisher > Query Report Viewer 

Query Report Viewer

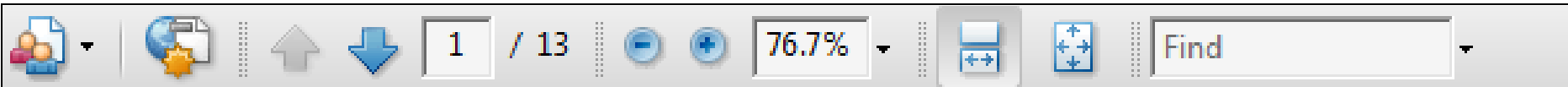
Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by: begins with

[Advanced Search](#)

Search Results [Show Template Prompts](#)

Report Definition					
Report Name	Description	Data Source ID	*Format	Burst	View Report
ERP_BEN_FORM	Benefits Enrollment Forms	ERP_BEN_ENROLL	PDF	N	View Report



Please type or print in ball point pen. Refer to instructions on reverse side of this form.

1. Employee Information

Name: Miller, Savana Jane

(Last, First, Middle Initial)

Employee ID: ADCRM1001

Home Mailing Address: 3890 N. Haskell Dr.

(Street)

Telephone: 818/555-9231

(Between 9:00a.m. and 4:00p.m)

Encino CA 91438

(City, State, Zip Code)

E-mail address: HCMGENUser1@ap8023fems.us





Questions ?

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