XML Publisher for PeopleSoft Enterprise

By
Dick Kelley, VP & Director of Sales
Kiran Reddy, PeopleSoft Tech Lead
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
<table>
<thead>
<tr>
<th>Federal</th>
<th>State &amp; County</th>
<th>Universities</th>
<th>Commercial &amp; Internationals</th>
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</tbody>
</table>
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.

Data sources, Report Definitions, Templates, Translations

Application Designer

Project

TST
UAT
PRD

HEUG
ORACLE Platinum Partner
CMMI LEVEL 3
GSA
SBA
Inc. 500
Benefits of XML Publisher

• Single data source for generating multiple reports.
Benefits of XML Publisher

PeopleSoft Database

XML Publisher

Report Layouts

Output Formats

PDF
RTF
HTML
XLS

Output Destinations

Email
Printer
Web
File
Window
Benefits of XML Publisher

- Multi language support.
- One template for multiple languages.
## XML Publisher - Comparison

<table>
<thead>
<tr>
<th>Criteria</th>
<th>XMLLP</th>
<th>SQR</th>
<th>Crystal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compatibility</td>
<td>Unix, NT</td>
<td>Unix, NT</td>
<td>NT</td>
</tr>
<tr>
<td>Data Source</td>
<td>Query, Connected</td>
<td>Code</td>
<td>Query</td>
</tr>
<tr>
<td></td>
<td>Query, XML file, Rowset*, XML doc*</td>
<td>Code</td>
<td></td>
</tr>
<tr>
<td>Report Design</td>
<td>Word, PDF, XSL</td>
<td>Code</td>
<td>Crystal file</td>
</tr>
<tr>
<td>Report Definition</td>
<td>Database</td>
<td>SQR File</td>
<td>Crystal file</td>
</tr>
<tr>
<td>Report Formatting</td>
<td>Simple</td>
<td>Complex</td>
<td>Medium</td>
</tr>
<tr>
<td>Report Output</td>
<td>Pdf, Rtf, Html, XLS</td>
<td>Pdf, Html, Lis, Spf, CSV</td>
<td>Pdf, Rtf, Html, XLS</td>
</tr>
</tbody>
</table>

* - 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.
• 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.

![XML Publisher Configuration](image)
XML Publisher in 8.50/8.51

- Descriptive file names for the report outputs.
XML Publisher in 8.50/8.51

- Alternate XML for template preview.
• Full path mapping to handle repeating fields in PDF templates.
Agenda

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- Administration
  - Global settings
  - Security

- Reporting
  - XMLP Report using RTF Template?
  - XMLP Report using PDF Template?
Administration – XML Publisher Properties

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

<table>
<thead>
<tr>
<th>Level</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>System Properties and fonts</td>
<td>xdo.cfg file (PS_HOME\appserv)</td>
</tr>
<tr>
<td>Global Properties</td>
<td>Reporting Tools, XML Publisher, Setup, Global Properties</td>
</tr>
<tr>
<td>Report Properties</td>
<td>Reporting Tools, XML Publisher, Report Definition, Properties</td>
</tr>
<tr>
<td>Runtime Properties</td>
<td>PeopleCode API (ReportDefn.SetRuntimeProperties)</td>
</tr>
</tbody>
</table>
• 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.

```xml
<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-cache-page-size">50</property>
    <property name="system-temp-dir"></property>
  </properties>

  <!--<fonts>-->
  <!--<font family="3 of 9 Barcode" style="normal" weight="normal">-->-->
  <!--<truetype path="C:\WINNT\Fonts\3of9.ttf" /-->-->
  <!--</font>-->
  <!--</fonts>-->
</config>
```
• Shared by all reports and overrides the properties on xdo engine.
• Properties for a single report and override global properties.
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.
Report category is required attribute on all report definitions and it applies row level security to the data on those components.
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- Administration
  - Global settings
  - Security
- Reporting
  - XMLP Report using RTF Template?
  - XMLP Report using PDF Template?
Creating an 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.
Creating an XMLP Report – Connected Query

• Save the XML file for report template design.
Creating an XMLP Report – Connected Query

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

Design Helper

Template Designer Client Tools

Plug-in for Microsoft Word (requires 2000 or later)
Facilitates the insertion of application data tags into RTF templates.
Creating an XMLP Report – Connected Query

Employee Salary Table

<table>
<thead>
<tr>
<th>NAME</th>
<th>EMLID</th>
<th>ADDRESS</th>
<th>JOBCODE</th>
<th>JOB</th>
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</table>
Creating an XMLP Report – Connected Query

<table>
<thead>
<tr>
<th>Report Name:</th>
<th>ERP_SAL_RPT</th>
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<tbody>
<tr>
<td>Data Source Type:</td>
<td>Connected Query</td>
</tr>
<tr>
<td>Data Source ID:</td>
<td>ERP_COMP_DATA</td>
</tr>
<tr>
<td>Data Source Description:</td>
<td>Employee Salary Data</td>
</tr>
<tr>
<td>Report Properties</td>
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<td>Report Description:</td>
<td>Employee Salary Report</td>
</tr>
<tr>
<td>Report Status:</td>
<td>Active</td>
</tr>
<tr>
<td>Report Category ID:</td>
<td>ALLUSER</td>
</tr>
<tr>
<td>Object Owner ID:</td>
<td>PeopleTools</td>
</tr>
<tr>
<td>*Template Type:</td>
<td>RTF</td>
</tr>
<tr>
<td>Retention Days:</td>
<td>45</td>
</tr>
<tr>
<td>Registered Date/Time:</td>
<td>02/22/2011 3:41:21PM</td>
</tr>
<tr>
<td>Updated Date/Time:</td>
<td>02/23/2011 9:58:43AM</td>
</tr>
</tbody>
</table>
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.
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.
• Properties page is used to define report level settings for different property groups.

• Properties set here will override the global properties.
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.
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.

``` PeopleCode
import PSXP_RPTDEFNMGR::RPTDEFNMGR;
import PT_CONQRS::*;

Local PT_CONQRS::CONQRSMGR &conqrsmgr;
Local string &sCONQRSNAME;
Local Rowset &rsObjectRowset;
Local PSXP_RPTDEFNMGR::ReportDefn &oRptDefn;

&sCONQRSNAME = "ERP_COMP_DATA";
/*Report Information*/
&oRptDefn = "ERP_SAL_RPT";
&sTplDefn = "ERP_SAL_RPT_1";
&LangCode = "";
&dtAsOfDate = %Date;
&sOutputFmt = "RTF";

try
    /* Open the connected query*/
    &sCONQRSNAME = "ERP_COMP_DATA";
```
• Create a XML Publisher process type for the report.

![XML Publisher process type configuration](image-url)
Creating an XMLP Report – Connected Query

• Report is run from System Process Request page.
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.
Creating an XMLP Report – Connected Query

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

![Image of Report Manager interface]
### Employee Salary Report

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

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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 9:00 a.m. and 4:00 p.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.

**1. Employee Information**

<table>
<thead>
<tr>
<th>Name:</th>
<th>Employee ID:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Last, First, Middle Initial)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Home Mailing Address:</th>
<th>Telephone:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Street)</td>
<td>(Between 9:00a.m</td>
</tr>
<tr>
<td></td>
<td>E-mail address:</td>
</tr>
<tr>
<td>(City, State, Zip Code)</td>
<td></td>
</tr>
</tbody>
</table>

Please type or print in ball point pen. Refer to instructions on reverse side of this form.
Creating an XMLP Report – PDF Template

- Create a report definition with PS Query as the data source.
- Template type is 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.
Click “Generate” to generate a file suitable for mapping the data elements.
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”.

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

1. Employee Information

Name: ____________________________

(Last, First, Middle Initial)

Home Mailing Address: ____________________________

(Street)

(City, State, Zip Code)
Creating an XMLP Report – PDF Template

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

![Query Report Viewer](image.png)
Creating an XMLP Report – PDF Template

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)
Home Mailing Address: 3890 N. Haskell Dr.
(Street)
Encino, CA 91436
(City, State, Zip Code)

Employee ID: ADCRM1001

Telephone: 818/555-9231
(Between 9:00 a.m. and 4:00 p.m)
E-mail address: HCMGENUser1@ap6023fems.us
Questions?

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Dublin OH 43017  
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