Everybody Get Together, Try to Report Together Right Now

Southeast Atlantic Regional User Group

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Your Presenters

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The VCCS is a system of 23 community colleges that have a combined headcount of over 150,000 and FTE around 101,000 for Spring term 2014 with an additional 100,000 annual non-credit enrollments.

We came live on PeopleSoft Campus Solutions between 2001 and 2004.

Our colleges have a great deal of independence

System Office maintains Enterprise System and works with Policy/Practice issues
Overview

VCCS has about 250 custom Crystals, most developed and maintained by college developers. We want to get these to BI Publisher. This is not a technical workshop on how to convert to BI publisher. It’s a discussion of how we’re directing the process.
Agenda/Contents

• Why is this really a problem?
• What’s the difference between a System Office and a College Programmer?
• Let’s talk about training
• How are we going to keep the process moving?
• Oracle has been a bit cagey on the subject of Crystal. We suspect that one day they will remove support for NT Schedulers.
• We’d love to dispose of our NT Schedulers anyway.
• Crystal is a product is awkward to deal with.
• Most of the reports are developed by colleges and it needs to stay that way!
What’s the difference between a System Office and a College Programmer?

• Other than the obvious good looks and intelligence of the System Office staff?
• College developers are much closer to college staff and much closer to day to day operations.
• College developers tend to be focused on the problems of their colleges.
• System Office tries to do development that works for lots of colleges. Requirements Analysis and Testing are not quick!
All Good Revolutions start with Training

- Actually started with Advising reports. During our advising project we sucked out the brains of some consultants.
- SO staff worked with colleges to update Transcripts and Advising Reports
- Put on a series of workshops for colleges – a general training session, a follow on Q&A session and currently doing regional workshops.
What do I think is good technical training?

- I think it's very tough for a training company to do.
  - Need to understand our queries, custom tables
  - Need to understand VCCS reporting requirements
- Good trainers are essential.
- Appropriate use of technology is also essential.
- Starts with a tool overview.
- Includes hands on with canned examples.
- Provides opportunities for follow up questions (encouraging follow up use as a side product).
- Provides opportunities to address actual problems faced by trainees.
- Finds ways to encourage trainees to help trainees.
• Data Source ID names created for use with Report Definitions should begin with the two character college code (e.g., BR for Blue Ridge, VW for Virginia Western, etc) followed by an underscore, then a descriptive name for the Data Source. The Data Source ID name has a 30 character limit. Data Sources developed for system wide common reporting should use the VX prefix.

• Report Definition names should also begin with the two character college code followed by an underscore and then a descriptive name for the Report Definition. The Report Definition name has a 12 character limit. Report Definitions developed for system wide common reporting should use the VX prefix.

• The Template ID should use the same name as the Report Definition followed by an underscore and sequential number starting with 1; e.g., _1. This permits multiple templates with a given Report Definition which allows colleges the flexibility to have multiple versions of a similar report / letter. The system will automatically follow this pattern when inserting rows in the Template ID area.
Training Topics – Part 1 – continued

• Template File .rtf documents should begin with the two character college code followed by an underscore and then a descriptive name for the Template File. The Template File name is not limited in character size by Campus Solutions since it is an .rtf document. Template Files developed for system wide common reporting should use the VX prefix.

• Only ITS will modify delivered XML Data Source / Report / Template / Template File Definitions; e.g., the delivered Advising PDF. In these cases VX_ will be used on the modified Template Files and only the original, and most recently modified, Template Files will be maintained. The modified Template Files will also use an effective dates as a suffix in SIS. ITS staff should place copies of the ‘current’ Template .rtf documents in the appropriate Database Modifications / RTF folders. Older versions should be placed in the Archive sub-folder.

• XML Data Source Definitions, Report Definitions, Template Definitions and Template File Definitions should be inserted into projects for migration between database instances. Please see XML Project Objects document found in the Procedures section for further details.
All objects related to XML report creation should be inserted into a project, via Application Designer, for migration between database instances. These objects include the XMLP Report Definition, XMLP Template Definition, and XMLP File Definition. The XMLP Data Source Definition may also need to be included in the project.

The XML File Definition is created from the XML Template File .rtf documents when these documents are uploaded into the Report Definition via the Upload link on the Report Definition Template Page. The XML File Definition name is a randomly generated series of letters/numbers controlled by the system. The only way to identify the XML File Definition names associated with the XML Report is by using the ‘insert related objects’ feature within Application Designer.

Note that ALL XMLP Template and File definitions associated with any given XMLP Report definition must be part of the project when migrating the project between instances. This includes all effective dated rows for the Report_Template. The XMLP Data Source Definition may also need to be included if this is the initial creation of the data source OR if it has been modified. Inserting XMLP Data Source Definitions into a project is done by using the Insert Objects and selecting XMLP Data Source Definition.
How are we going to Keep this moving?

- Plan to shut down HR Crystal scheduler after split.
- Track college creation of reports.
- Continue to hold training sessions.
- Eventually set a deadline.
- Encourage all 23 colleges to participate in peer/workgroup sessions to share knowledge and support each other.
This assumes that you have already installed the BI Publisher in MS Word. This is also assuming that your data source is a PS Query.

Phase I: Create and register data sources

1. Go to: Main Menu ➔ Reporting Tools ➔ BI Publisher ➔ Data Source
2. If adding a new data source, select **PS Query** as the Data Source Type and the name of your query as the Data Source ID
3. On the Data Source page, the *Description* is free form and leave the *Owner ID* blank. Make sure that the *Active* check box is selected.
4. If you want to generate a sample XML file for BI Publisher, select **Generate** for a *Sample Data File*. Click on the link and save the XML file.
5. Click **Save**.
Phase II: Create the RTF Template

1. In MS Word, select the **BI Publisher** tab.
2. Select **Sample XML** to load your sample XML file into MS Word.
3. Create your template and save as a RTF file.
Phase III: Define BI Publisher Report

1. Go to: Main Menu ➔ Reporting Tools ➔ BI Publisher ➔ Report Definition

2. On the Report Definition page, enter:
   a. Name of your report for Report Name
   b. Query for Data Source Type
   c. Name of the data source created in Phase I. Note: If you are using a Query Data Source, you do not have to complete Phase I. PeopleSoft will create it for you automatically.

3. On the Definition tab:
   a. The Report Description field is free form
   b. Report Status is either In Progress, Active, or Inactive
   c. Report Category ID is ALLUSER.
   d. Object Owner is the default, PeopleTools
   e. Template Type is RTF
4. On the Template tab:
   4. The Template ID is free form, but required.
   5. The Description field is free form.
   6. For the Template Files
      4. Set the date that this Template file is active
      5. Set the status
      6. Upload the RTF file created in Phase II
      7. Leave Channel and Use Data Transform blank

5. On the Output tab:
   4. Select the format types that you want to make available to your users.
   6. Leave the Properties tab at the default.
   7. Check the Allow viewer ID assignment at report runtime checkbox.

Phase IV: Run the report

1. Go to Main Menu ➔ Reporting Tools ➔ BI Publisher ➔ Query Report Viewer
2. Select the report created in Phase III.
3. Select View Report
• Don’t get too enthusiastic about getting actual answers!
Thank you for attending..
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