XML Publisher with connected query: A Primer

Session #30459

March 19, 2012
Agenda/Contents

- Introduction
- Overview of XMLP
- Getting Started
- Best practices for building a basic XMLP report
- Connected Query Basics
- Building a XMLP report around connected query
- Tips and Tricks
- Questions
Introduction
Presenter

Varsha Das, UCF – 16 years Higher Education

- Technical Lead for FSCM 9.1 Upgrade
- 10 years PS implementation, Technical Development, Upgrade
- HEUG General Ledger product advisory group (GL-PAG)
- GL-PAG liaison to Student Financials PAG (SF-PAG)
- OAUG Fusion Council Steering Committee
This is UCF

Established in 1963 as Florida Technological University

Second largest public university campus in the US
Over 58,000 students

133.3 million external research funding

Anchoring a New medical city

12 Colleges – 11 regional campuses
Over 10,500 faculty & staff
## Current Applications and PeopleTools

<table>
<thead>
<tr>
<th>Applications</th>
<th>PeopleTools</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campus Solutions 9.0</td>
<td>8.50.13</td>
</tr>
<tr>
<td>Human Capital Management 9.0</td>
<td>8.50.13</td>
</tr>
<tr>
<td>Enterprise Portal 9.0</td>
<td>8.50.03</td>
</tr>
<tr>
<td>Customer Relationship Management 9.1</td>
<td>8.50.09</td>
</tr>
<tr>
<td>Financials &amp; Supply Chain Management 9.1</td>
<td>8.50.07</td>
</tr>
</tbody>
</table>
## Current ERP Projects

<table>
<thead>
<tr>
<th>Application</th>
<th>Project</th>
<th>Scheduled Go-Live</th>
</tr>
</thead>
<tbody>
<tr>
<td>FSCM 9.1</td>
<td>Additional Modules: Project Costing, Contracts, Billing and Accounts</td>
<td>Feb 2013</td>
</tr>
<tr>
<td>CS/HR 9.0</td>
<td>Split HRMS and Campus Solutions databases</td>
<td>Oct 2012</td>
</tr>
<tr>
<td>HRMS 9.0</td>
<td>Upgrade to version 9.1</td>
<td></td>
</tr>
</tbody>
</table>
Overview of XMLP
XML Publisher Overview

- Separate Data Extraction from Report Layout
  - Create report layout templates with the more common desktop
  - Generate reports in many formats (PDF, RTF, Excel, HTML, and so on) in many languages
  - Reduce report maintenance, enabling power business users to adjust report templates
  - IT resources freed up to focus on data extraction
XML Publisher: Benefits

- Leverage common productivity tools
- Multi-output format
- Feature-rich report

- Focus on report layout, not data extraction
- Deliver feature rich reports, charts, analytics
- Provide multiple formats, translations

- Focus on Data Extraction, rather than layout
- Develop once, use many
- Manage Security

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XML Publisher – Tools levels

8.48/8.49 -PS Query, Rowset, XML-File & XML Doc

8.50 -PS Query, Connected Query, XML File
Getting Started with XML Publisher
Getting Started: Step 1 - Add-in for Word

STEP 1: Add-in for Word

1. Download the XML Publisher Toolbar
   - Login to PeopleSoft
   - Navigate: Home > Reporting Tools > XML Publisher > Setup > Design Helper

Plug-in for Microsoft Word (requires 2000 or later)
Facilitates the insertion of application data tags into RTF templates.
Getting Started: Step 1 (contd.)

Save .ZIP file

![File Download dialog box showing options to open or save the file.]

![Save As dialog box showing the file name and type.]

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Getting Started: Step 1 (contd.)

Unzip the file “xmlp_desktop.zip”

- Navigate to folder XMLP_DESKTOP. In this folder, select “BIPublisherDesktop.exe”

- Installs the XML Toolbar in Microsoft Word
Getting Started: Step 2 - Set Up Report Categories

Set Up Report Categories

Navigate: Home > Reporting Tools > XML Publisher > Setup > Report Category

Report Category

<table>
<thead>
<tr>
<th>Report Category ID:</th>
<th>ALLUSER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description:</td>
<td>All PeopleSoft User</td>
</tr>
</tbody>
</table>

Report Definition Editors and Viewers

<table>
<thead>
<tr>
<th>ID Type</th>
<th>Security ID</th>
<th>Description</th>
<th>Viewer</th>
<th>First</th>
<th>Last</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role</td>
<td>FX_AP_PAYCYCLE</td>
<td>AP Pay cycle Void Payment</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>FX_AP_SUPER</td>
<td>AP Super User</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>FX_AP_SUPPORT</td>
<td>AP Support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>FX_PT_BASIC</td>
<td>Basic PeopleTools Permissions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>FX_PT_FUNCTIONAL</td>
<td>PeopleTools Role-Functional</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>FX_PT_GU</td>
<td>PeopleTools Role for SuperUser</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Role</td>
<td>PeopleSoft User</td>
<td>PeopleSoft User</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Report Properties

<table>
<thead>
<tr>
<th>Report Description:</th>
<th>Withhold 1099 Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Category ID:</td>
<td>ALLUSER</td>
</tr>
<tr>
<td>Object Owner ID:</td>
<td>Payables</td>
</tr>
</tbody>
</table>
Getting Started: Step 3 – Global Properties

Setting Global Properties

- Navigate: Home > Reporting Tools > XML Publisher > Setup > Setting Global Properties

- Can be used to set document properties (e.g., ability to edit PDF output)

- Global Properties page for all reports or on the Report Properties page for a specific report (Recommended to set at report level)
Getting Started: Step 4 - Assigning XMLP Permissions to Users

Level 1: XMLP Report User (Example PTPT1000)

Level 2: XMLP Power User (Example PTPT2500)

Level 3: XMLP report developer (Example PTPT2600)

<table>
<thead>
<tr>
<th>Component</th>
<th>XMLP Report Developer (PTPT2600)</th>
<th>XMLP Power User (PTPT2500)</th>
<th>PeopleSoft User (PTPT1000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report Category</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Design Helper</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Global Properties</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Data Source</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Report Definition</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note. Display-only access for</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>bursting.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note. Report properties page is</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>not available.</td>
<td></td>
</tr>
<tr>
<td>Content Library</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Template Translations</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Query Report Viewer</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Query Report Scheduler</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Report Repository</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Note: Report properties page is not available.
Connected Query Basics

Connected Query enables you to create a single XML file based on a set of queries with parent-child relationships

Useful when:
- To simplify task for a business user.
- When two or more SQL statements are linked with left outer join to the same query
- Replacing Crystal reports (that use subreports) with XML Publisher reports
- When outputs need to be in structured XML
Creating a Connected Query

Create your queries in query Manager

Navigation: Home > Reporting Tools > Query > Query Manager

Query Name: VKD_FUND_CQ_XMLP
Description: Fund Codes List

Chosen Records

Alias Record
A FUND_TBL - Fund Table

Fields

<table>
<thead>
<tr>
<th>Col</th>
<th>Record.Fieldname</th>
<th>Format</th>
<th>Ord</th>
<th>XLAT</th>
<th>Agg</th>
<th>Heading Text</th>
<th>Add Criteria</th>
<th>Edit</th>
<th>Delete</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A.SETID - SetID</td>
<td>Char5</td>
<td></td>
<td></td>
<td></td>
<td>SetID</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>A.FUND_CODE - Fund Code</td>
<td>Char5</td>
<td>1</td>
<td></td>
<td></td>
<td>Fund</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>A.DESCRIPTION - Description</td>
<td>Char30</td>
<td></td>
<td></td>
<td></td>
<td>Descr</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Criteria

<table>
<thead>
<tr>
<th>Logical</th>
<th>Expression1</th>
<th>Condition Type</th>
<th>Expression 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>A.EFFECTIVE_DATE</td>
<td>Ef Date &lt;=</td>
<td>Current Date</td>
</tr>
<tr>
<td>AND</td>
<td>A.EFFECTIVE_DATE</td>
<td>equal to</td>
<td>A</td>
</tr>
<tr>
<td>AND</td>
<td>A.DESCRIPTION - Description</td>
<td>not like</td>
<td>delete%</td>
</tr>
</tbody>
</table>

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Creating a Connected Query (contd.)

I created the following queries:

- `VKD_DEPT_SPTYP_CQ_XMLP` – Department speedtype list for Connected Query
- `VKD_ASSETS_DEPT_CQ_XMLP` – Assets for a Department for Connected Query
- Connected by DEPTID
Creating a Connected Query

Connected Query Manager

Connected Query: VKD_DEPT_ASSET_CQ.XMLP
Public: ✔
Status: Active

Description:
Description: Assets details for each dept
Comments: Asset, cost, custodian and Location by Department

Parent Query Selection
Parent Query: VKD_DEPT_SPTYP_CQ.XMLP

Connected Query Structure
- VKD_DEPT_SPTYP_CQ.XMLP
- VKD_ASSETS_DEPT_CQ.XMLP

Insert a new query as a child of the selected query.
Insert a new query as a sibling of the selected query.
Delete a selected query.
Open a related field selection section.
Open a selected query in Query Manager in read-only mode.
Creating a Connected Query

Map Fields to connect two queries on common Field

- To achieve a better performance, queries that are positioned higher in a Connected Query hierarchy should be limited in the number of rows being returned.

- Make sure Status is active and that your query is marked “Public”

- Public connected queries cannot include any private query.
Creating an XML Publisher Report

- Start with a basic query and add to it
- You need developer access to use connected query in XMLPreport defn
- Download sample file to local drive
- Make sure Template definition is “Active” not “In progress”

[Images of user interface windows for XML Publisher report definition and file download]

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Creating an XML Publisher Report

Report Name: VKO_CQ_XMLP

Data Source
- Data Source Type: Connected Query
- Data Source ID: VKO_FUND_DEPT_CQ_XMLP
- Data Source Description:

Report Properties
- Report Description: Departments in a fund
- Report Status: Active
- Report Category ID: ALLUSER
- Object Owner ID: PeopleTools
- Template Type: PDF
- Retention Days:
- Registered Date/Time:
- Updated Date/Time:
- Download: Sample Data
MS Word 2010 and BI publisher don't play well together: error "The macro cannot be found or has been disabled because of your Macro security settings". This is caused by one of the Microsoft's windows security update that installs VBA runtime file, which is supposed to fix a VBA vulnerability but caused third party softwares (plug-in) stop working! Delete '.exd' files, which have been invalidated by the update, then refresh them by restarting the Word again.
Creating an XMLP report

Click on “Insert All Fields:

- Save the file as .rtf (rich text format)
- Save to Local Drive for upload
Creating an XMLP report

Upload the template file you just created

- Set it to “Active”
- Run the report using either Preview (Sample Data) or Report Scheduler
Your XMLP Connected QueryReport

This is the challenging part - XMLP error messages are not friendly

error: 'Error generating report output: (235,2309) Error occurred during the process of generating the output file from template file, XML data file, and translation XLIFF file.'
Contacts

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