

PeopleSoft XML Publisher

SOA IS

Putting Customer First

Highlights

- ❖ Introduction
 - ❖ XML Publisher
 - ❖ Template Creation
 - ❖ Report Creation
 - ❖ Summary
-

Introduction

What is a Markup Language?

- ❖ A **markup language** is an *artificial language* using a set of annotations to text that give instructions regarding the structure of text or how it is to be displayed. Markup languages have been in use for centuries, and in recent years have also been used in computer typesetting and word-processing systems.
- ❖ A well-known example of a markup language in use today in computing is Hyper Text Markup Language (HTML), one of the most used in the World Wide Web.

Ex.

```
<?xml version="1.0"?>
```

```
<!DOCTYPE para>
```

```
<!--What does Bolivia export, and whither?-->
```

```
<para xml:lang="en"> Bolivia exports tin Cuba &#231;ao.</para>>
```

What Is XML Publisher?

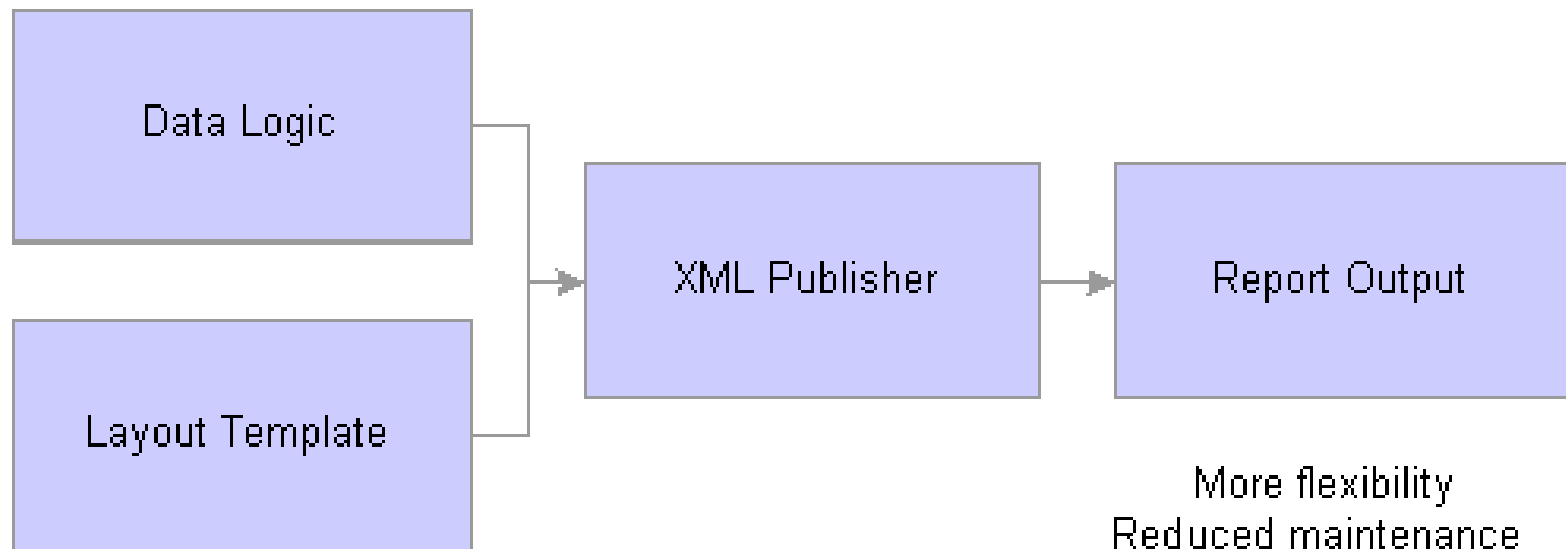
- ❖ XML Publisher for PeopleSoft Enterprise is a *template-based reporting solution* that separates the data extraction process from the report layout and allows the reuse of extracted application data into multiple report layouts.

Oracle XML Publisher

- ❖ Oracle has developed a standalone Java-based reporting technology called XML Publisher used for streamlined reporting and form generation
 - ❖ A Primary feature of this product is the separation of the Data extraction process from the Report Layout
 - ❖ Using a single template, reports can be generate in many output formats like .pdf, .rtf, .xls, .html etc.
-

XML Publisher

Separate data/layout



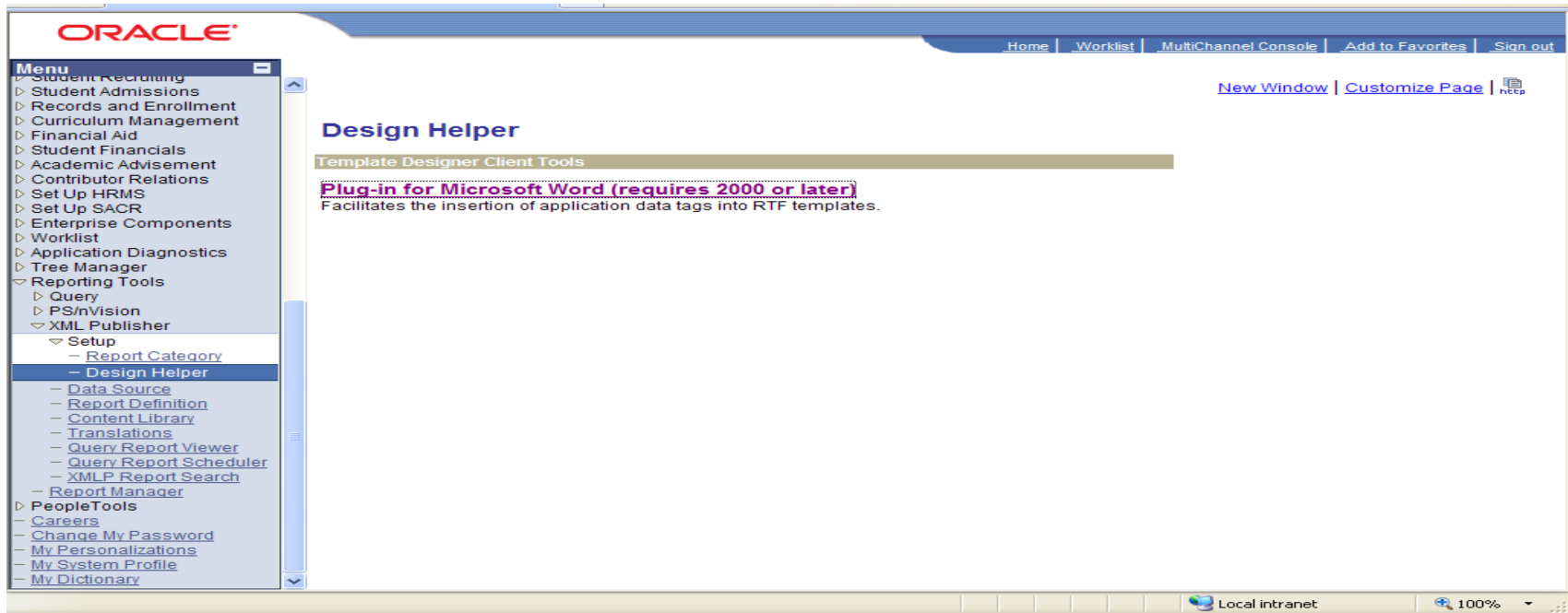
More flexibility
Reduced maintenance

Template Creation

To create a template, Template design helpers need to be used.

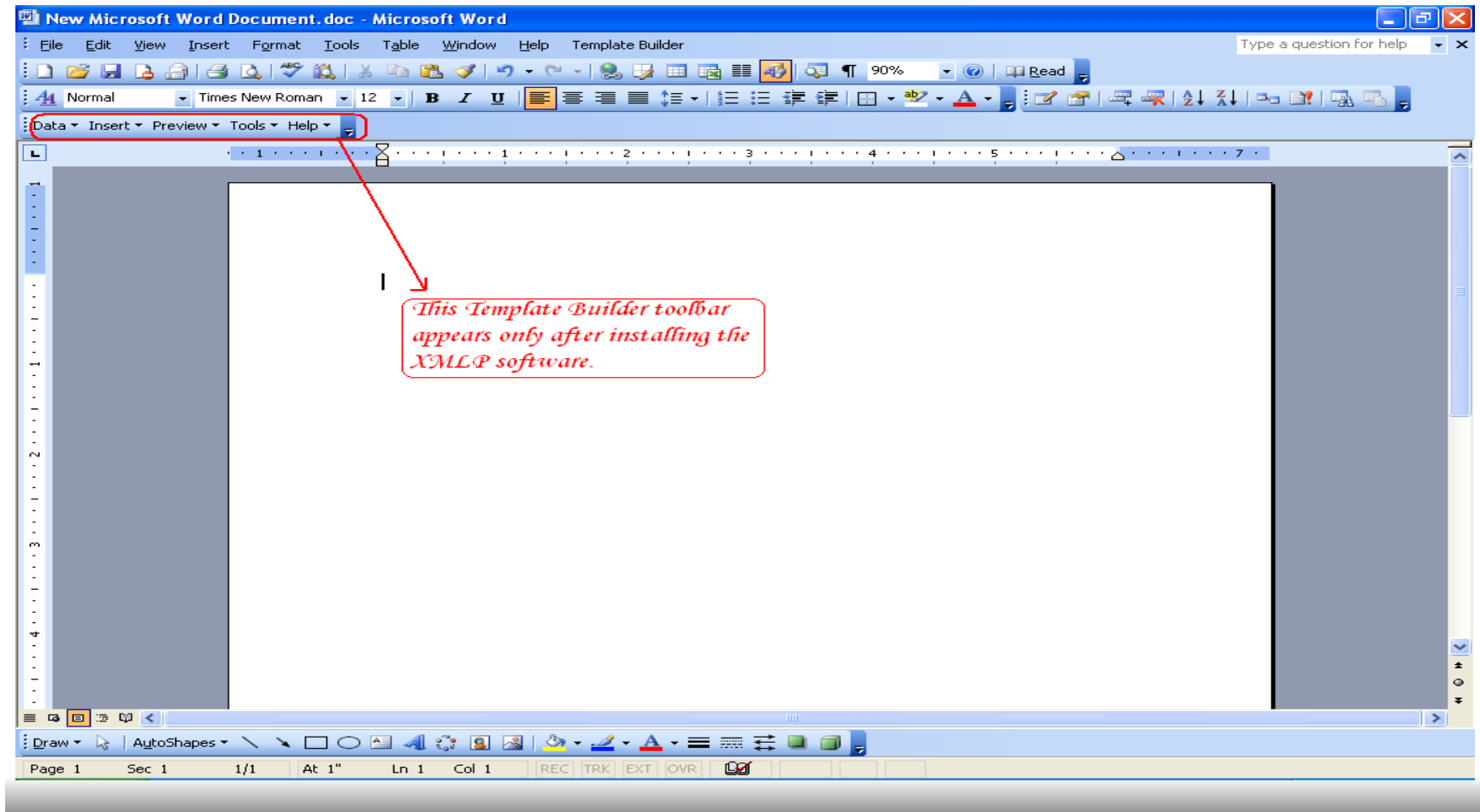
These are available in the form of Addins to standard text editors like MS Word.

To download the MS Word plug-in, go to the navigation as shown below:



Template Creation

The 'Template Builder' toolbar is available in MS Word after download.



XML Publisher Setup in PeopleSoft



The screenshot displays the PeopleSoft XML Publisher setup interface. On the left is a navigation menu, and the main area shows the XML Publisher configuration options.

Menu

- Workforce Monitoring
- Pension
- Campus Community
- Student Recruiting
- Student Admissions
- Records and Enrollment
- Curriculum Management
- Financial Aid
- Student Financials
- Academic Advisement
- Contributor Relations
- Set Up HRMS
- Set Up SACR
- Enterprise Components
- Worklist
- Application Diagnostics
- Tree Manager
- Reporting Tools
- Query
- PSInVision
- XML Publisher**
 - Setup
 - Data Source
 - Report Definition
 - Content Library
 - Translations
 - Query Report Viewer
 - Query Report Scheduler
 - XMLP Report Search
 - Report Manager

Main Menu > Reporting Tools >

XML Publisher [Edit "XML Publisher"](#)

Register XML-based report templates and translations. Run Query-based reports. Use enhanced search for XMLP report instances.

<p>Data Source</p> <p>Register schema and sample data files for XML Publisher data sources.</p>	<p>Report Definition</p> <p>Define reports by associating Data Sources with layout Template files.</p>	<p>Content Library</p> <p>Create and maintain reusable Sub-T definitions.</p>
<p>Translations</p> <p>Register Translation XLIFF files for Report RTF templates and Content Library RTF sub-templates</p>	<p>Query Report Viewer</p> <p>Run Query-based XMLP reports real-time. View in a window.</p>	<p>Query Report Scheduler</p> <p>Schedule Query-based XMLP reports to run bursted reports.</p>
<p>XMLP Report Search</p> <p>Locate XML Publisher report output using enhanced search criteria.</p>	<p>Setup</p> <p>Prepare for using XML Publisher.</p> <ul style="list-style-type: none"> Report Category Design Helper 	

Report Creation

XML Reports are created by separating the data extract from the report layout. The data can be extracted from the PeopleSoft database using different types of data sources like PS Query, RecordSets etc.

Creating the Data Logic

Navigation:

Reporting Tools > Query Manager > Create New Query

1. Select the record name from which data needs to be extracted and Click on **Add record**
 2. Select the fields that are to be returned from the query.
 3. Incorporate all criteria and joins in order to arrive at the right query for the report output.
 4. Save the query as public with a Name and Description.
-

Report Creation

The screenshot displays the Oracle SOA Suite web interface. On the left, a navigation menu is expanded to show the path: Reporting Tools > XML Publisher > Setup > Data Source. The main content area is titled 'Data Source' and contains the following elements:

- Links: [Find an Existing Value](#) | [Add a New Value](#)
- *Data Source Type: (dropdown menu)
- *Data Source ID: (with a search icon)
- Private Query
-
- Additional links: [Find an Existing Value](#) | [Add a New Value](#)

The status bar at the bottom shows 'Done', 'Local intranet', and '100%' zoom level.

1. Navigate to Reporting Tools → XML Publisher → Setup → Data Source
2. Add a new data source with the same name as the PS query name saved in the previous step

3. Generate .xml file and .xsd files from the Data source page and save them.

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#) |

Menu

- ▷ Pension
- ▷ Campus Community
- ▷ Student Recruiting
- ▷ Student Admissions
- ▷ Records and Enrollment
- ▷ Curriculum Management
- ▷ Financial Aid
- ▷ Student Financials
- ▷ Academic Advisement
- ▷ Contributor Relations
- ▷ Set Up HRMS
- ▷ Set Up SACR
- ▷ Enterprise Components
- ▷ Worklist
- ▷ Application Diagnostics
- ▷ Tree Manager
- ▽ Reporting Tools
 - ▷ Query
 - ▷ PS/nVision
- ▽ XML Publisher
 - ▷ Setup
 - Data Source
 - [Report Definition](#)
 - [Content Library](#)
 - [Translations](#)
 - [Query Report Viewer](#)
 - [Query Report Scheduler](#)
 - [XMLP Report Search](#)
 - [Report Manager](#)
- ▷ PeopleTools
 - [Careers](#)
 - [Change My Password](#)
 - [My Personalizations](#)
 - [My System Profile](#)
 - [My Dictionary](#)

Data Source

Data Source Type: PS Query
Data Source ID: MYTEST

Data Source Properties

Description: MYTEST Active
Object Owner ID:
Registered Date/Time: 11/26/08 7:31:16PM Registered By: PS
Last Update Date/Time: 11/26/08 8:02:35PM Updated By: PS

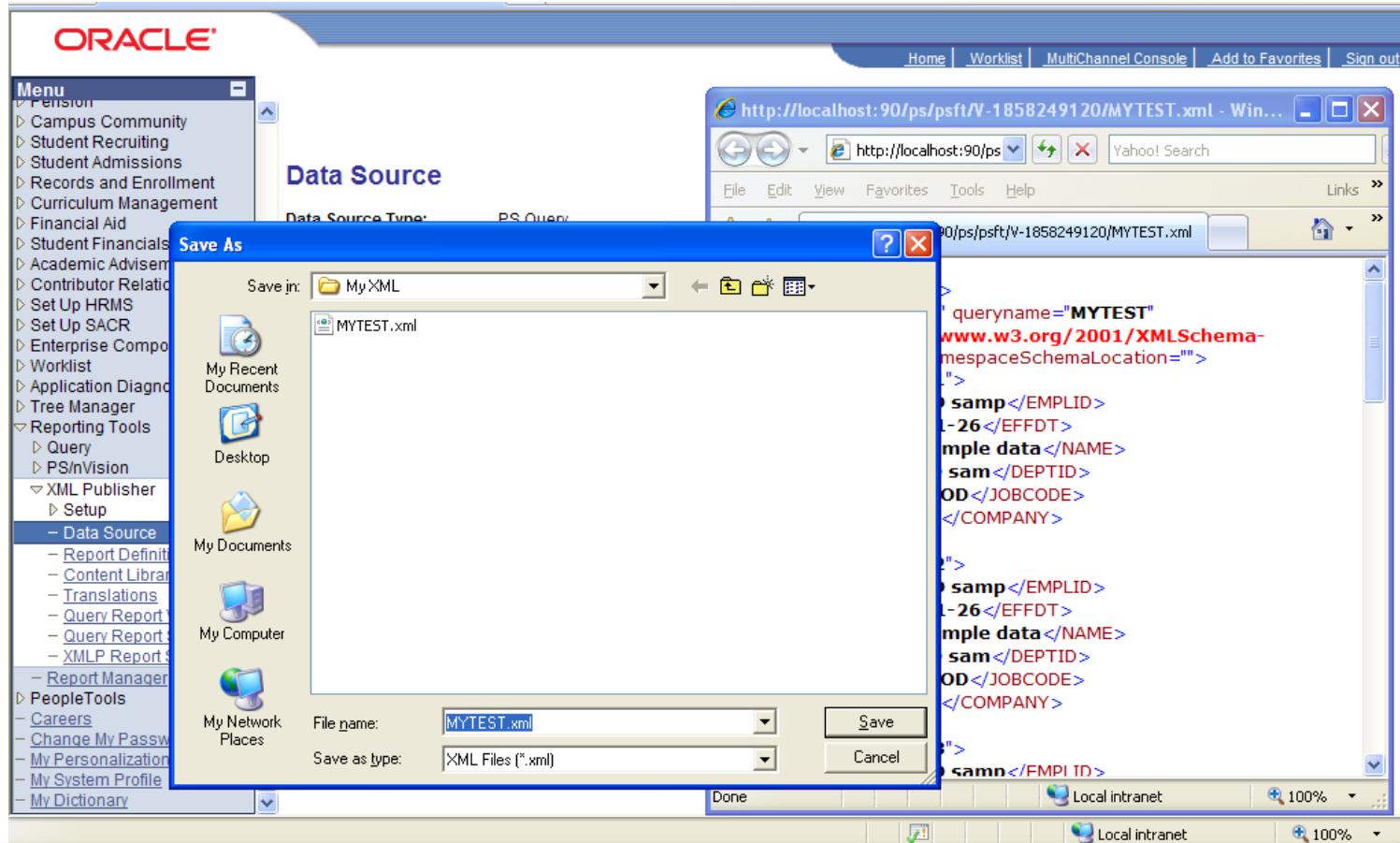
Related Files

File Type	File	Generate File
Sample Data File	MYTEST.XML	Regenerate
Schema File	MYTEST.XSD	Regenerate

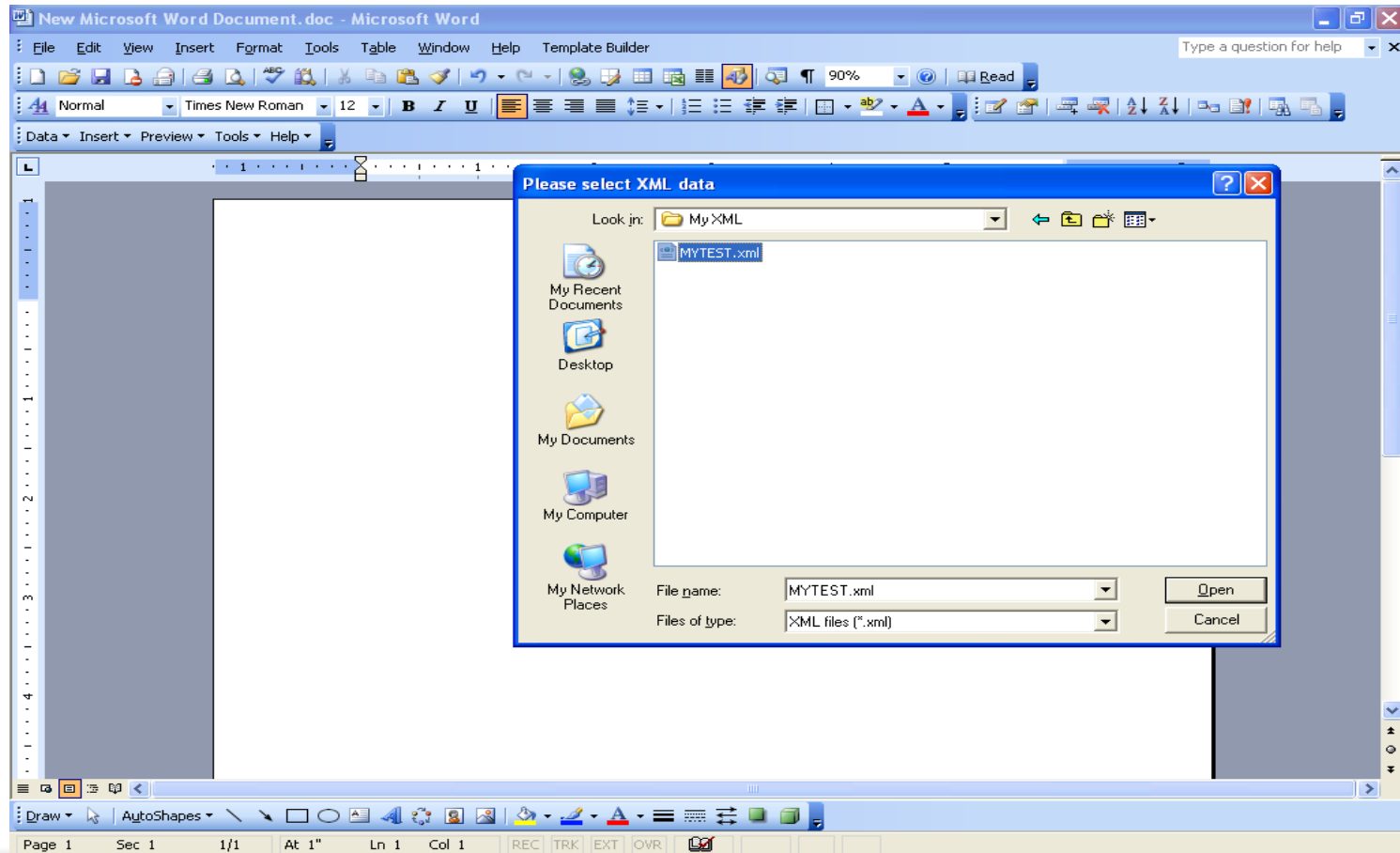
Main Content

Local intranet 100%

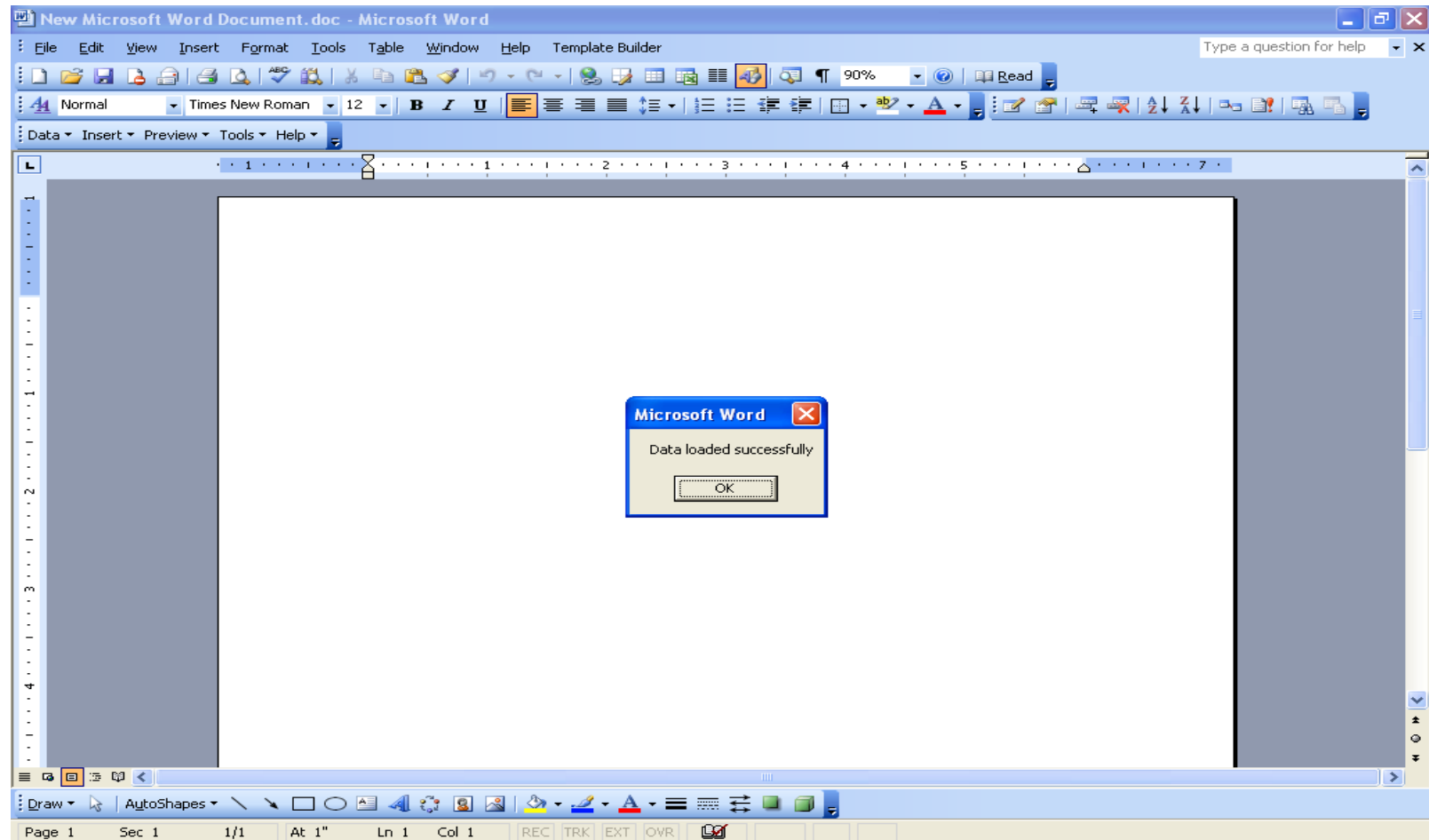
4. Save the .xml file generated onto to the local drive. This file will be used to upload data into the template generated.



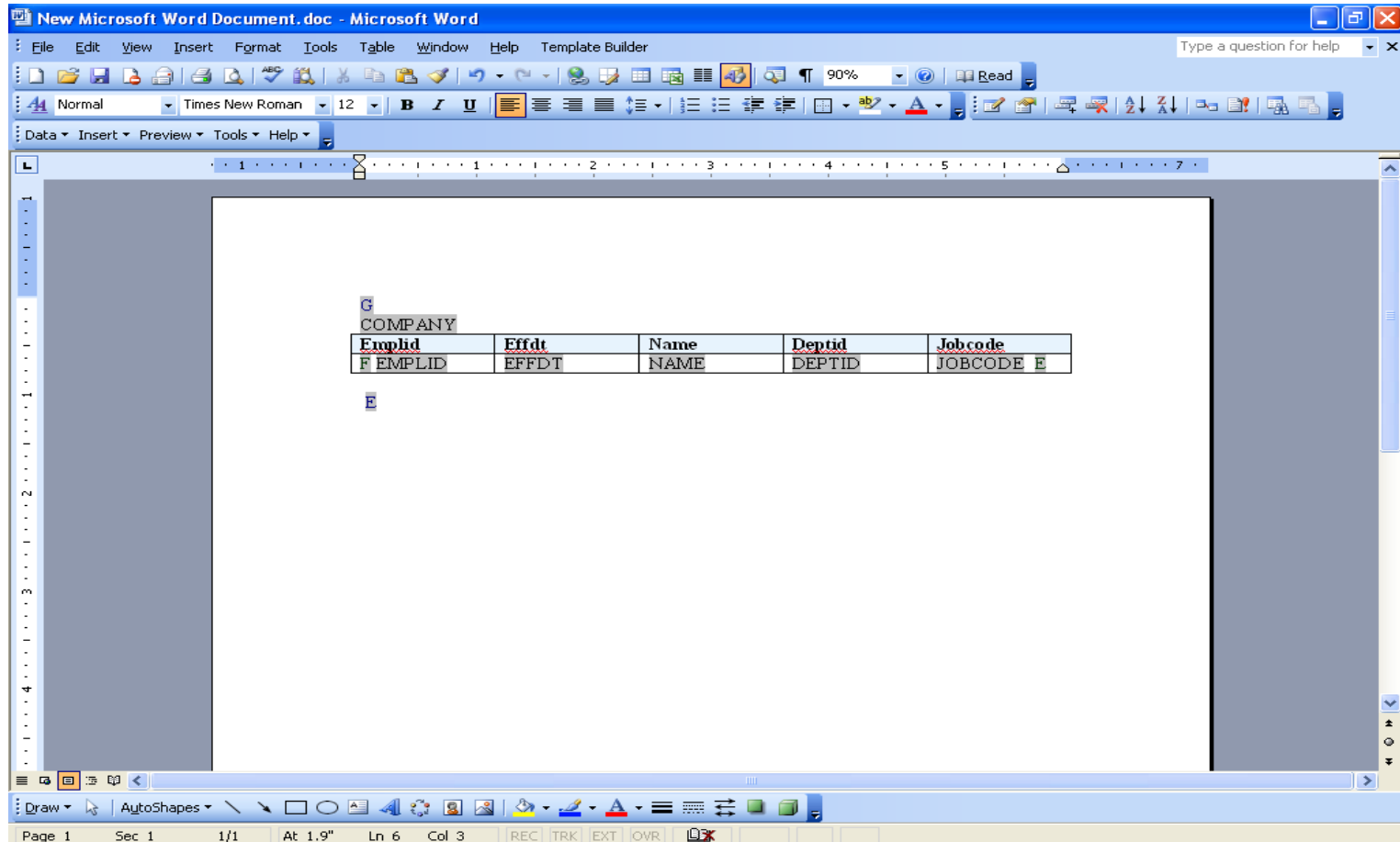
5. To load the data into the template, go to Template Builder toolbar > Data > Load XML Data



6. A message confirms the successful load of data into the template



7. To design the report layout from the menu select
Insert > Table/Form > Wizard to insert a Table into the template



8. Select the fields to be displayed on the report output from the field list

The screenshot shows a Microsoft Word document with a table. The table has the following structure:

Emplid	Effdt	Name	Deptid	Jobcode
EMPLID	EFFDT	NAME	DEPTID	JOB

The 'Field' dialog box is open, showing a tree view of fields. The tree structure is as follows:

- Query
 - @numrows
 - @queryname
 - @xmlns:xsi
 - @xsi:noNamespaceSchemaLocation
- Row
 - @rownumber
 - Emplid
 - Effdt
 - Name
 - Deptid
 - Jobcode
 - Company

The 'Field' dialog box also includes an 'Example' section with a 'Calculation' dropdown menu and a checkbox for 'On Grouping'. There are 'Insert', 'Close', and 'Help' buttons at the bottom of the dialog. A note at the bottom of the dialog says 'Please select a node in the tree.'

9. Save the document in .rtf format.

The screenshot shows the Microsoft Word interface with the document 'MyTest.rtf'. The ribbon includes File, Edit, View, Insert, Format, Tools, Table, Window, Help, and Template Builder. The status bar at the bottom indicates 'Page 1', 'Sec 1', '1/1', 'At 1"', 'Ln 1', 'Col 1', and 'REC | TRK | EXT | OVR'.

The document content is as follows:

G
COMPANY

Emplid	Effdt	Name	Deptid	Jobcode
F EMPLID	EFFDT	NAME	DEPTID	JOBCODE E

E

10. Register the Report Definition with the Report name and Data Source id already created

The screenshot displays the Oracle PeopleSoft web interface. On the left is a navigation menu with the following items: Pension, Campus Community, Student Recruiting, Student Admissions, Records and Enrollment, Curriculum Management, Financial Aid, Student Financials, Academic Advisement, Contributor Relations, Set Up HRMS, Set Up SACR, Enterprise Components, Worklist, Application Diagnostics, Tree Manager, Reporting Tools (with sub-items Query and PS/nVision), XML Publisher (with sub-items Setup, Data Source, Report Definition, Content Library, Translations, Query Report Viewer, Query Report Scheduler, and XMLP Report Search), Report Manager, PeopleTools (with sub-items Careers, Change My Password, My Personalizations, My System Profile, and My Dictionary). The 'Report Definition' menu item is highlighted.

The main content area is titled 'Report Definition' and contains the following fields and options:

- Report Name: MYTEST
- *Data Source Type: PS Query (dropdown menu)
- Data Source ID: MYTEST
- Private Query
- An 'Add' button

At the top right of the page, there are links for 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'. On the right side of the main content area, there are links for 'New Window', 'Customize Page', and a help icon.

11. Enter the data on the Report definition page as shown

The screenshot shows the Oracle PeopleSoft interface for defining a report. The left-hand menu is expanded to 'Reporting Tools' > 'PS/nVision' > 'XML Publisher' > 'Data Source' > 'Report Definition'. The main content area has tabs for 'Definition', 'Template', 'Output', 'Security', and 'Bursting', with 'Definition' selected. The report name is 'MYTEST'. The 'Data Source' section shows 'Data Source Type' as 'PS Query', 'Data Source ID' as 'MYTEST', and 'Data Source Description' as 'MYTEST'. The 'Report Properties' section includes a 'Report Description' field with the text 'This is my XML', a '*Report Status' dropdown set to 'Active', a '*Report Category ID' dropdown set to 'ALLUSER' (with a search icon and the text 'All PeopleSoft User'), and an 'Object Owner ID' dropdown set to 'PeopleTools'. The 'Template Type' section has radio buttons for 'PDF', 'RTF' (which is selected), 'eText', and 'XSL'. There are also fields for 'Days Before Purge', 'Registered Date/Time', and 'Registered By'. At the bottom, there are buttons for 'Add', 'Update/Display', 'Include History', and 'Correct History', along with a 'Save' button.

ORACLE

Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

New Window | Customize Page | http

Menu

- Person
- ▷ Campus Community
- ▷ Student Recruiting
- ▷ Student Admissions
- ▷ Records and Enrollment
- ▷ Curriculum Management
- ▷ Financial Aid
- ▷ Student Financials
- ▷ Academic Advisement
- ▷ Contributor Relations
- ▷ Set Up HRMS
- ▷ Set Up SACR
- ▷ Enterprise Components
- ▷ Worklist
- ▷ Application Diagnostics
- ▷ Tree Manager
- ▼ Reporting Tools
 - ▷ Query
 - ▷ PS/nVision
 - ▼ XML Publisher
 - ▷ Setup
 - Data Source
 - Report Definition
 - Content Library
 - Translations
 - Query Report Viewer
 - Query Report Scheduler
 - XMLP Report Search
 - Report Manager
 - ▷ PeopleTools
 - Careers
 - Change My Password
 - My Personalizations
 - My System Profile
 - My Dictionary

Definition | Template | Output | Security | Bursting

Report Name: MYTEST

Data Source

Data Source Type: PS Query

Data Source ID: MYTEST

Data Source Description: MYTEST

Report Properties

Report Description: This is my XML

***Report Status:** Active

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

Object Owner ID: PeopleTools

Template Type: PDF RTF eText XSL

Days Before Purge:

Registered Date/Time: **Registered By:**

Updated Date/Time: **Updated By:**

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

12. On the template tab, upload the Report template from the local drive by clicking on the Upload button

The screenshot displays the Oracle SOA Suite web interface. On the left is a navigation menu with categories like 'Reporting Tools' and 'XML Publisher'. The main content area shows the 'Report Definition' page for a template named 'MYTEST'. The 'Template' tab is active, showing fields for 'Template ID' (MYTEST_1), 'Description', 'Language Code' (English), and 'Channel'. Below these are 'Template Files' with 'Effective Date' (11/26/2008) and '*Status' (Active). At the bottom of the form, there are three buttons: 'Upload', 'Download', and 'Preview'. The 'Upload' button is highlighted with a red rectangular box. A red arrow points from a red callout box containing the text 'Click on this button to Upload the rtf file' to the 'Upload' button. Other buttons like 'Add', 'Update/Display', 'Include History', and 'Correct History' are visible at the bottom of the page.

13. On the Output tab, specify the Report output format type and destination where the output needs to be generated

The screenshot shows the Oracle SOA IS interface. On the left is a navigation menu with 'Reporting Tools' expanded to 'Query Report Scheduler'. The main area has tabs for 'Definition', 'Template', 'Output', 'Security', and 'Bursting', with 'Output' selected. The 'Report Name' is 'MYTEST'. Under the 'General' section, the checkbox 'PDF report output may be edited' is checked. The 'Runtime Output Format Options' table is as follows:

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"/>

Below the table is the 'Output Location' section with a dropdown menu for '*Location:' showing options: Any, File, Printer, and Web. At the bottom, there are buttons for 'Save', '+Add', 'Update/Display', 'Include History', and 'Correct History'.

14. On the Security tab, specify the report viewers – either a specific user id or a role that will identify the list of report viewers

The screenshot shows the Oracle PeopleTools interface. On the left is a navigation menu with categories like 'Reporting Tools' and 'XML Publisher'. The main area is titled 'Security' and shows configuration for report 'MYTEST'. The 'Report Viewers' section is active, featuring a table with columns 'ID Type', 'Distribution ID', and 'Description'. A dropdown menu is open under 'ID Type', showing 'Role' and 'User'. Below the table are buttons for 'Add', 'Update/Display', 'Include History', and 'Correct History', along with a 'Save' button. The top navigation bar includes links for 'Home', 'Worklist', 'MultiChannel Console', 'Add to Favorites', and 'Sign out'.


15. Setup Bursting options in order to use the same report template multiple times for like sets of data,

The screenshot displays the Oracle PeopleTools interface for configuring a report. The left-hand menu shows the navigation path: **Reporting Tools** > **Report Definition**. The main content area is titled "Bursting" and contains the following configuration sections:

- Report Name:** MYTEST
- Bursting** (Section Header)
- Burst by:** A dropdown menu is open, showing options: COMPANY, DEPTID, EFFDT, EMPLID, JOBCODE, and NAME.
- Template** (Section Header)
- Template controlled by:** Main Content
- Template Application Crite** (Section Header)
- Data Value:** A dropdown menu is open, showing options: LANGUAGE and NAME.
- Burst Security** (Section Header)
- Security Join Table:** An empty text input field.
- Security Field:** A dropdown menu.
- Security ID Type:** A dropdown menu.
- Field Mapping** (Section Header)
- Security Join Table Field:** A dropdown menu.
- Data Source Field:** A dropdown menu.
- Search Keys** (Section Header)
- Search Field:** A dropdown menu.

16. Save the Report Definition

ORACLE Home | Worklist | MultiChannel Console | Add to Favorites | Sign out

[New Window](#) | [Customize Page](#) | 

Menu

- ▷ Pension
- ▷ Campus Community
- ▷ Student Recruiting
- ▷ Student Admissions
- ▷ Records and Enrollment
- ▷ Curriculum Management
- ▷ Financial Aid
- ▷ Student Financials
- ▷ Academic Advisement
- ▷ Contributor Relations
- ▷ Set Up HRMS
- ▷ Set Up SACR
- ▷ Enterprise Components
- ▷ Worklist
- ▷ Application Diagnostics
- ▷ Tree Manager
- ▽ Reporting Tools
 - ▷ Query
 - ▷ PS/nVision
 - ▽ XML Publisher
 - ▷ Setup
 - [Data Source](#)
 - **Report Definition**
 - [Content Library](#)
 - [Translations](#)
 - [Query Report Viewer](#)
 - [Query Report Scheduler](#)
 - [XMLP Report Search](#)
 - [Report Manager](#)
 - ▷ PeopleTools
 - [Careers](#)
 - [Change My Password](#)
 - [My Personalizations](#)
 - [My System Profile](#)
 - [My Dictionary](#)

Definition |
 Template |
 Output |
 Security |
 Bursting

Report Name: MYTEST

Bursting

Burst by:

Template

Template controlled by:

Template Application Criteria

Data Value	Template ID	Language
<input type="text"/>	<input type="text"/>	<input type="text"/>

Burst Security

Security Join Table:

Security Field: **Security ID Type:**

Field Mapping

Security Join Table Field	Data Source Field
<input type="text"/>	<input type="text"/>

Search Keys

Search Field

17. In order to view the report output go to :
Reporting Tools → XML Publisher → Query Report Viewer and choose
the report name that you just created and click in the View report link

The screenshot shows the Oracle Query Report Viewer interface. On the left is a navigation menu with 'Reporting Tools' expanded to 'XML Publisher' and 'Query Report Viewer' selected. The main area displays a search interface with the following components:

- Query Report Viewer** header.
- Instruction: "Enter any information you have and click Search. Leave fields blank for a list of all values."
- Search criteria: "* Search by: Report Name" (dropdown), "begins with" (text), and "MYTEST" (input field).
- Buttons: "Search" and "Advanced Search".
- Search Results** section with a "Show Template Prompts" link.
- A table with columns: Report Name, Description, Data Source ID, *Format, Burst, and View Report.
- A dropdown menu for the *Format column, currently showing "HTM" and "PDF" selected.

Report Name	Description	Data Source ID	*Format	Burst	View Report
MYTEST	This is my XML	MYTEST	HTM	N	View Report

18. The output is generated with the template designed and opens in a new window as shown below:

The screenshot displays an Oracle web application interface. At the top left is the Oracle logo. A navigation menu on the left includes links for Pension, Campus Community, Student Recruiting, and Student Admissions. The top right contains navigation links: Home, Worklist, MultiChannel Console, Add to Favorites, and Sign out. Below the menu is a search window titled "G - Windows Internet Explorer" with the URL "http://localhost:90/ps" and a search box containing "MYTEST". The main content area shows a table of employee data under the heading "ACC". The table has columns for Emplid, Effdt, Name, Deptid, and Jobcode. Below the table, there are controls for "Customize", "Find", "View All", "First", "1 of 1", and "Last". A table below these controls shows "Source ID" and "Format" (HTM) with a "View Report" link.

Emplid	Effdt	Name	Deptid	Jobcode
PA002	1996-01-01	Walker, Gail K	95700	170055
PA008	1996-04-01	Silverstein, Jacob	95000	290000
PA014	1995-03-01	Sorensen, Elizabeth	95100	300015
PA020	1995-01-01	Carr, Kitty C	95000	500000
PA003	1996-01-01	Ouren, Tom	95700	120015
PA009	1995-04-01	Howard, Sheila	95700	170065
PA015	1995-03-01	Webster, Holly	95800	420110
PA021	1995-01-	Connor, Maureen	95600	590005

About SOAIS

SOAIS is a provider of Enterprise IT and Process outsourcing solutions. Since its inception SOAIS has expanded at a tremendous pace and has garnered customers from both mid-market segment and Fortune 100 companies. We have experience in managing ERP applications as well as in providing high value services around packaged enterprise applications such as PeopleSoft and Oracle. Our experience in the business process outsourcing area fully extends our services footprint to provide end to end enterprise wide solutions.

Please feel free to clarify queries or provide feedback on this presentation at <http://www.soais.com/askexpert.html>
