PeopleSoft
XML Publisher

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 çao.</para>>

SOAIS

Putting Customer First

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

Data Logic

Layout Template

XML Publisher

Report Output
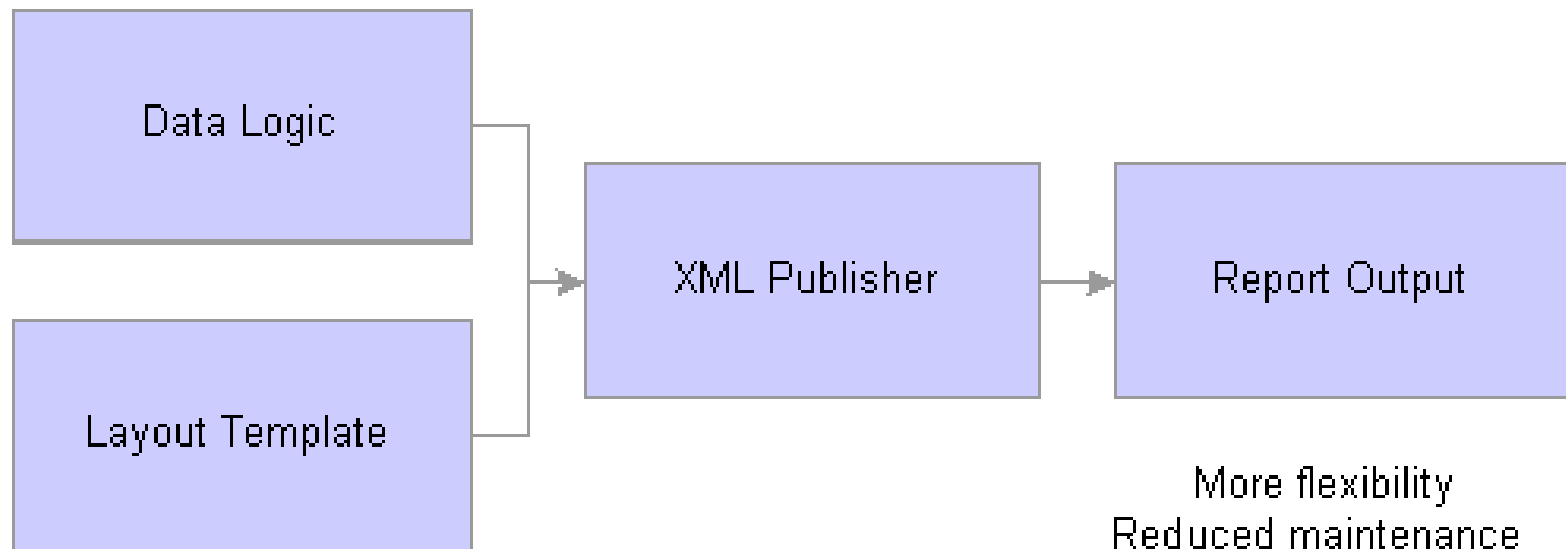
More flexibility
Reduced maintenance

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:
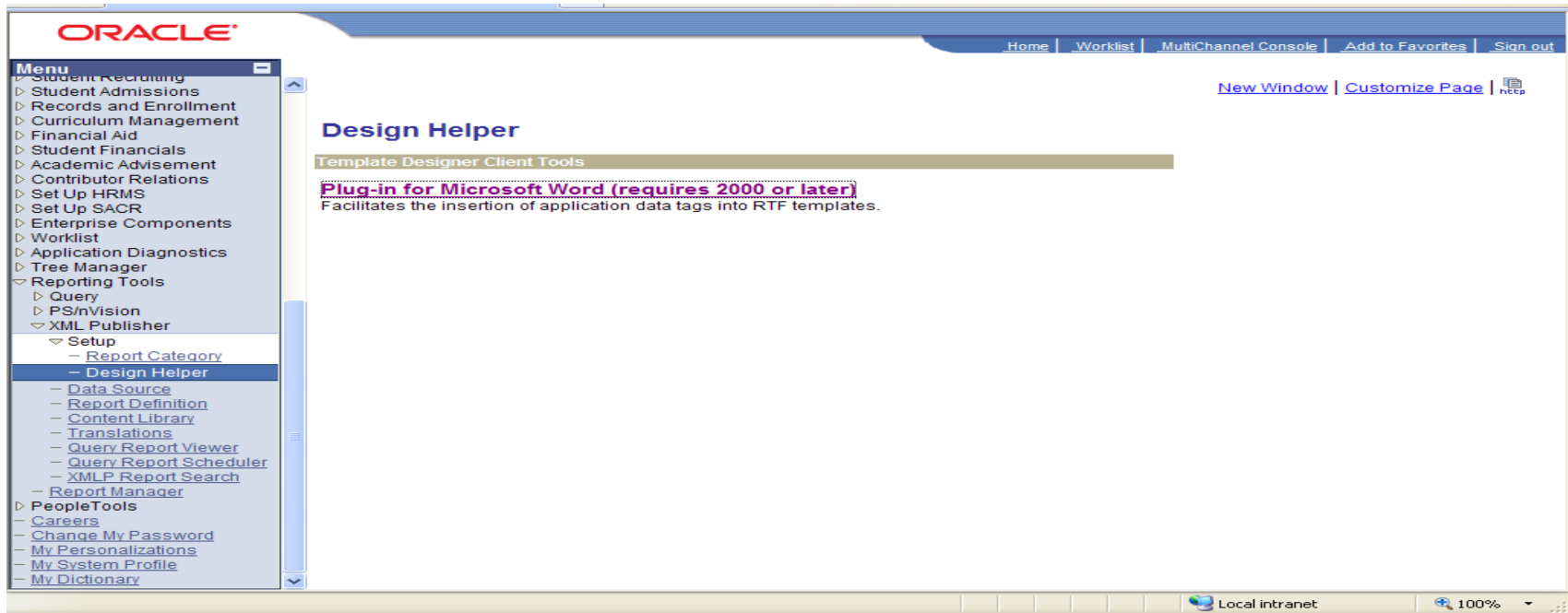
Template Creation

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

This Template Builder toolbar appears only after installing the XMLP software.
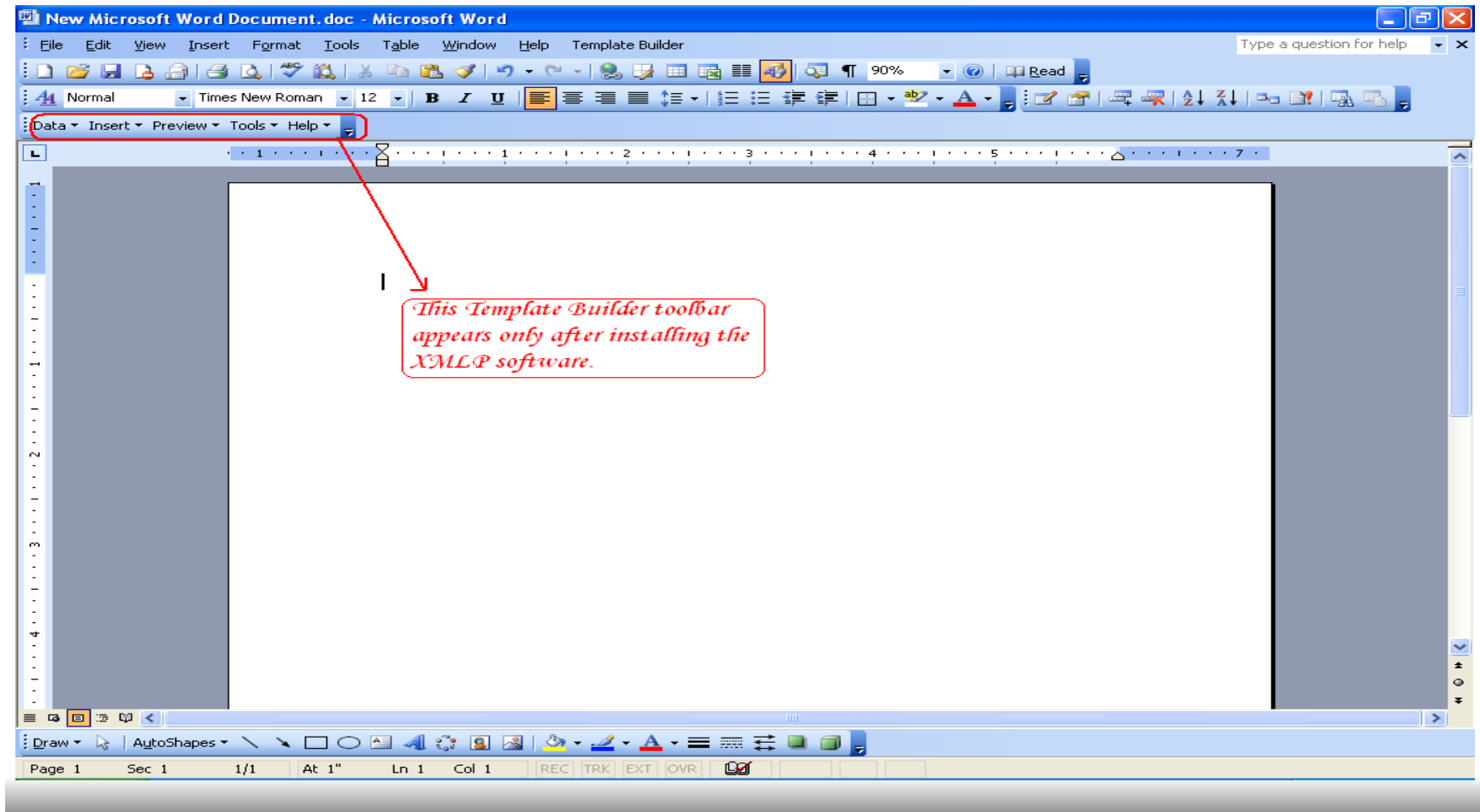
XML Publisher Setup in PeopleSoft

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

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.

4. Save the .xml file generated onto to the local drive. This file will be used to upload data into the template generated.
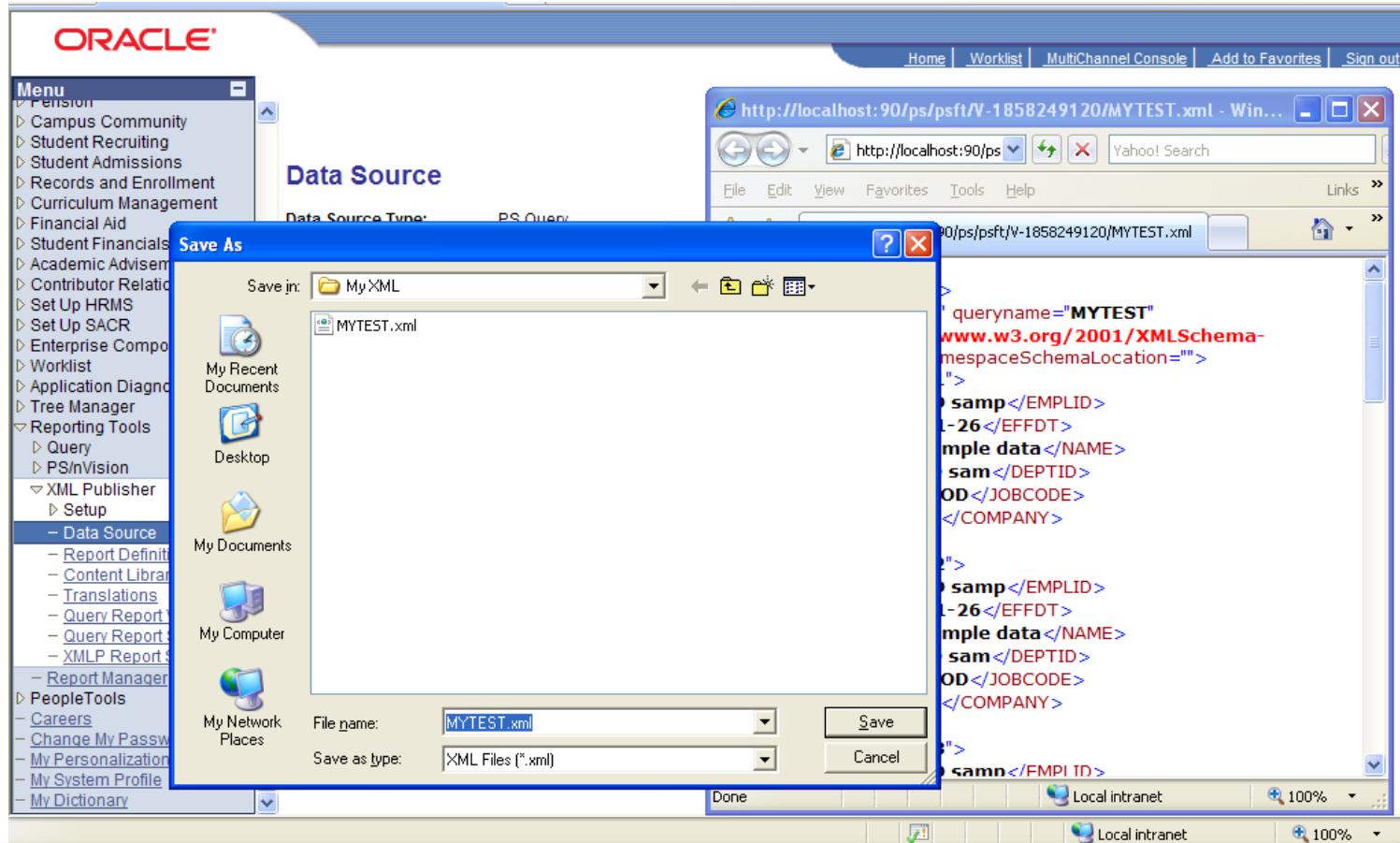
5. To load the data into the template, go to
Template Builder toolbar > Data > Load XML Data
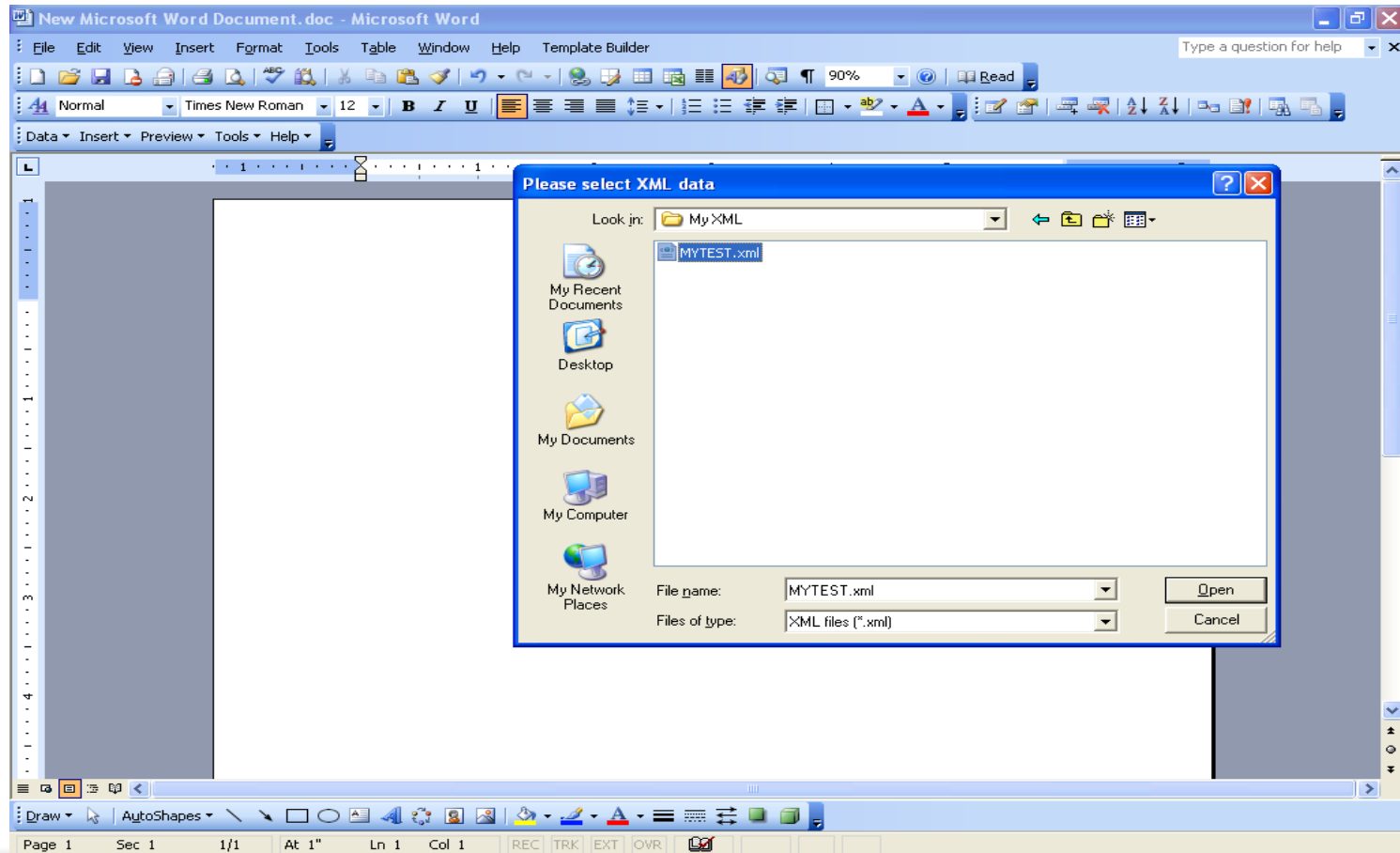
6. A message confirms the successful load of data into the template
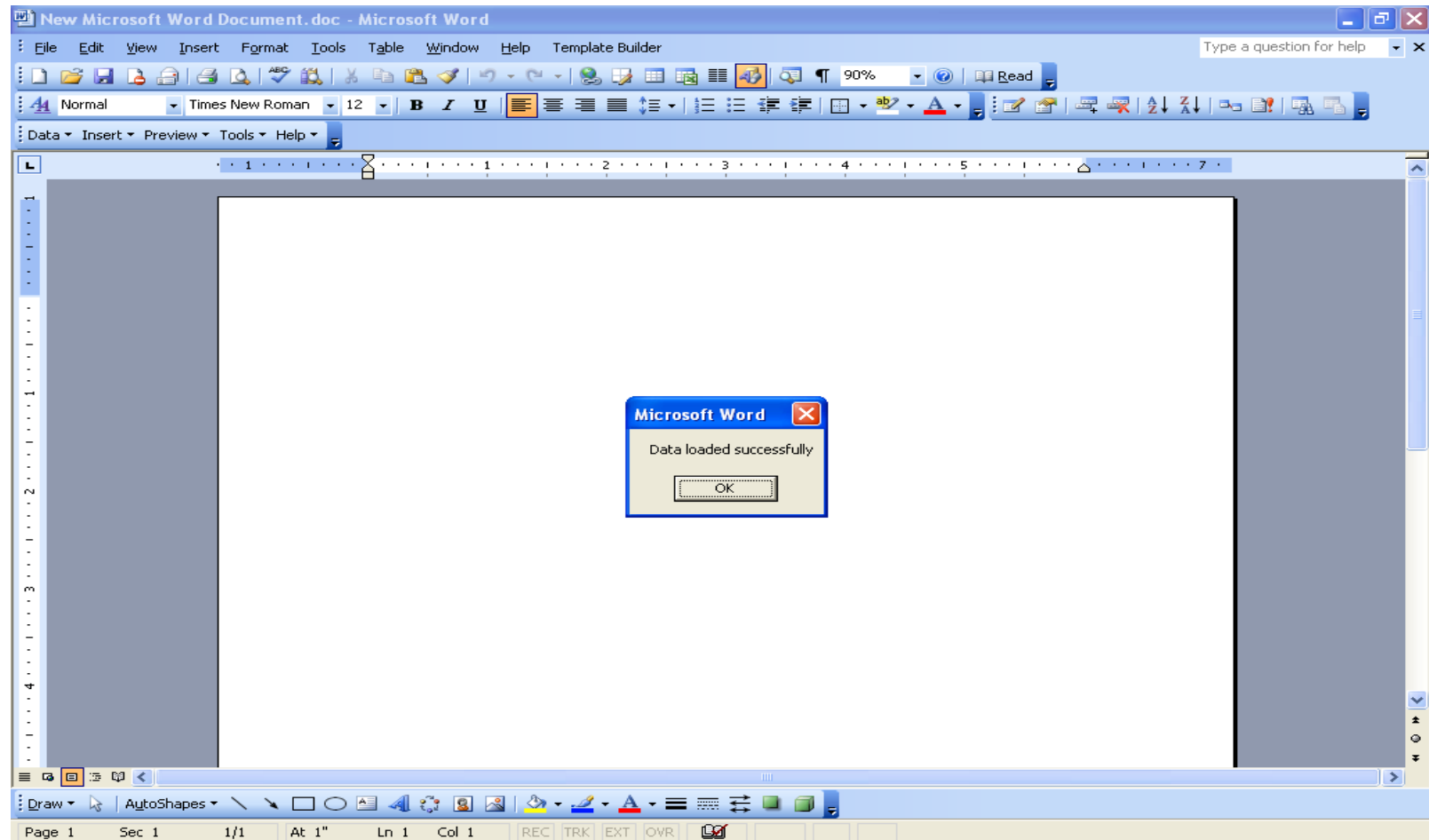
7. To design the report layout from the menu select Insert > Table/Form > Wizard to insert a Table into the template
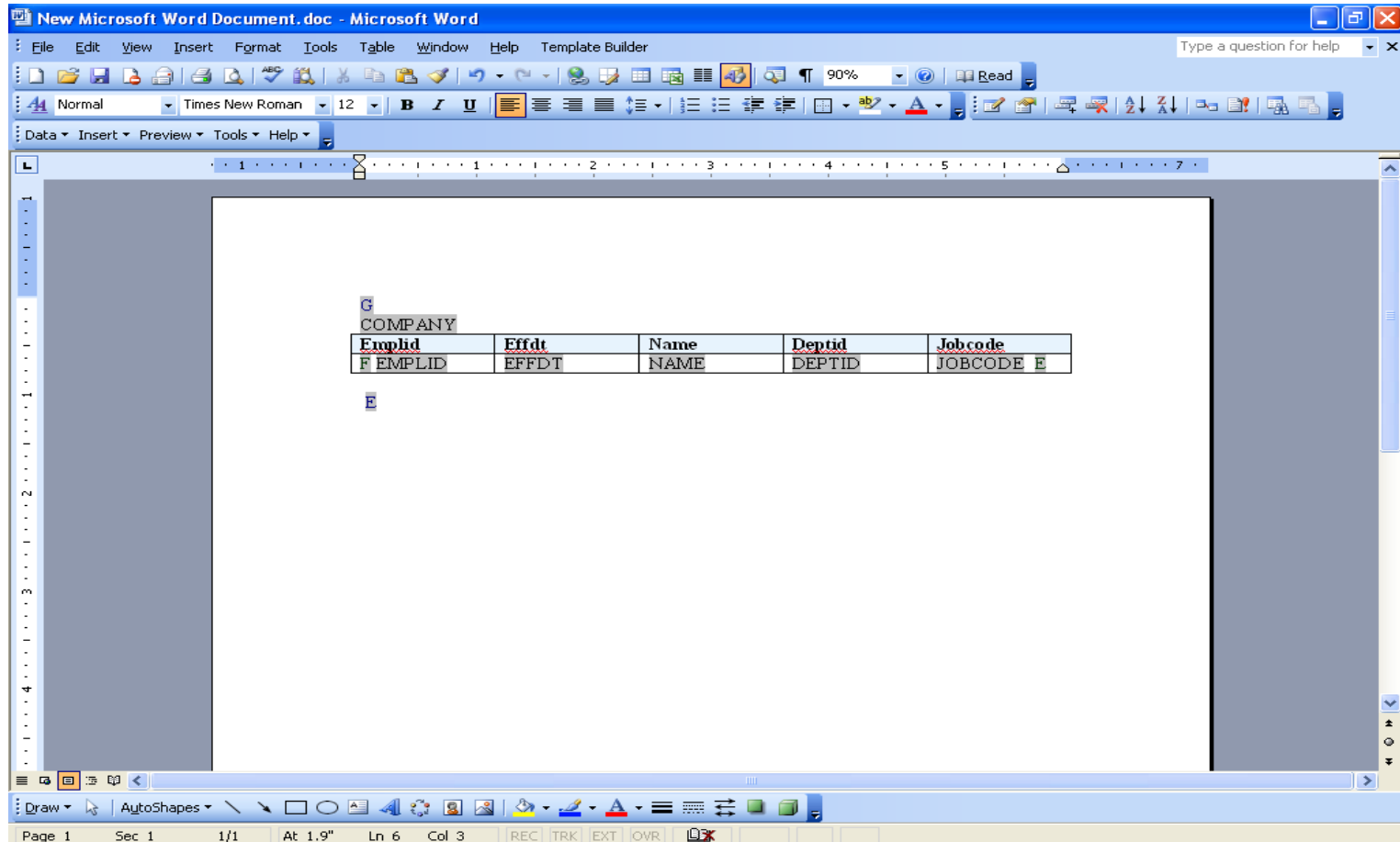
8. Select the fields to be displayed on the report output from the field list

9. Save the document in .rtf format.

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

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

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

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

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

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

16. Save the Report Definition

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

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

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