XML Publisher Tips for PeopleTools

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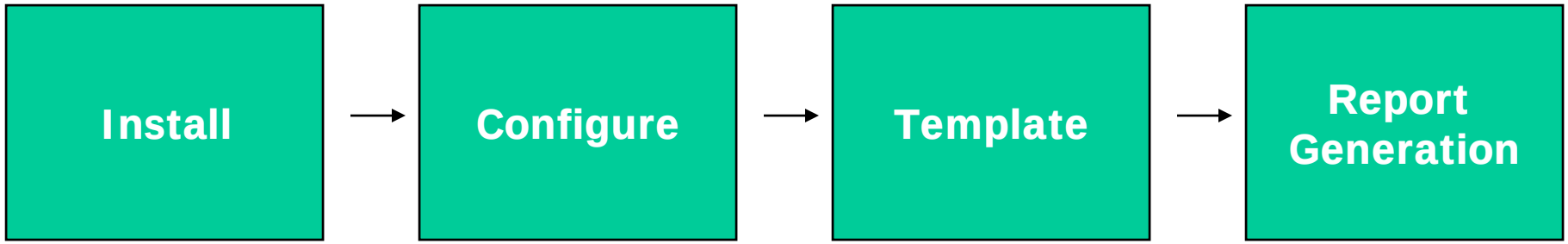
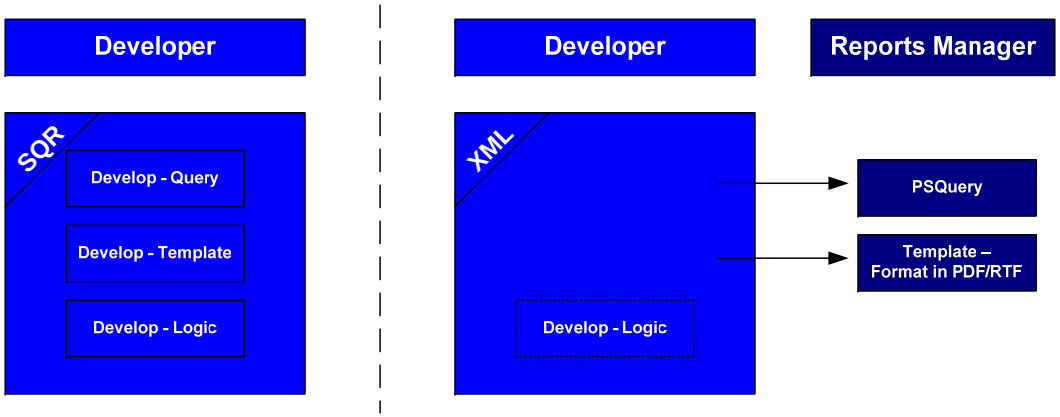
Agenda

- **Steps to configuring XML Publisher Reports**
  - Training Slide Deck
- **Demo of XML Publisher**
  - Create an XML Publisher Report from a PSQUERY



Background on XML Publisher

- **Oracle's flexible reporting capability**
- **Separates data, format and translation into three distinct parts**
  - **Instead of older methods where all three are in one entity (ie. SQR's)**
- **Single data source to support multiple reports**



Features & Benefits

End Users
-Leverage common productivity tools
-Multi output format

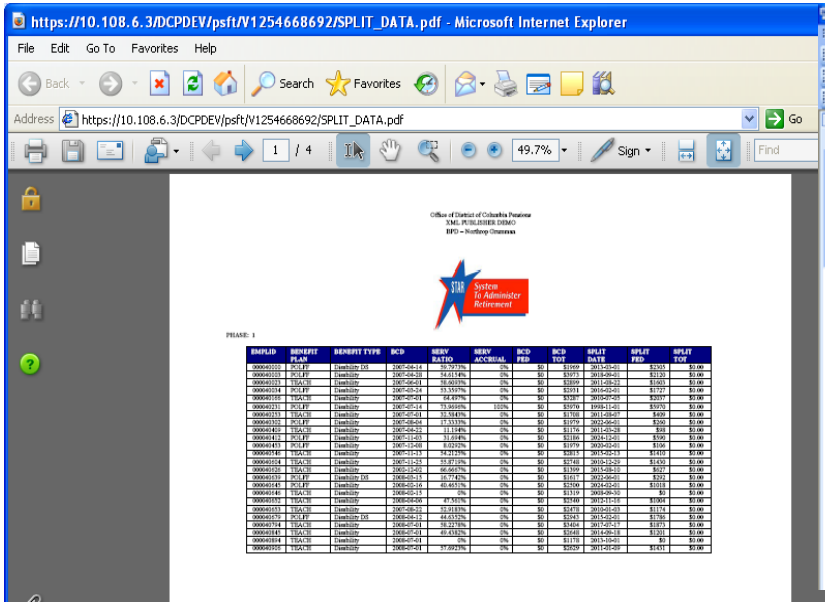
XML Publisher

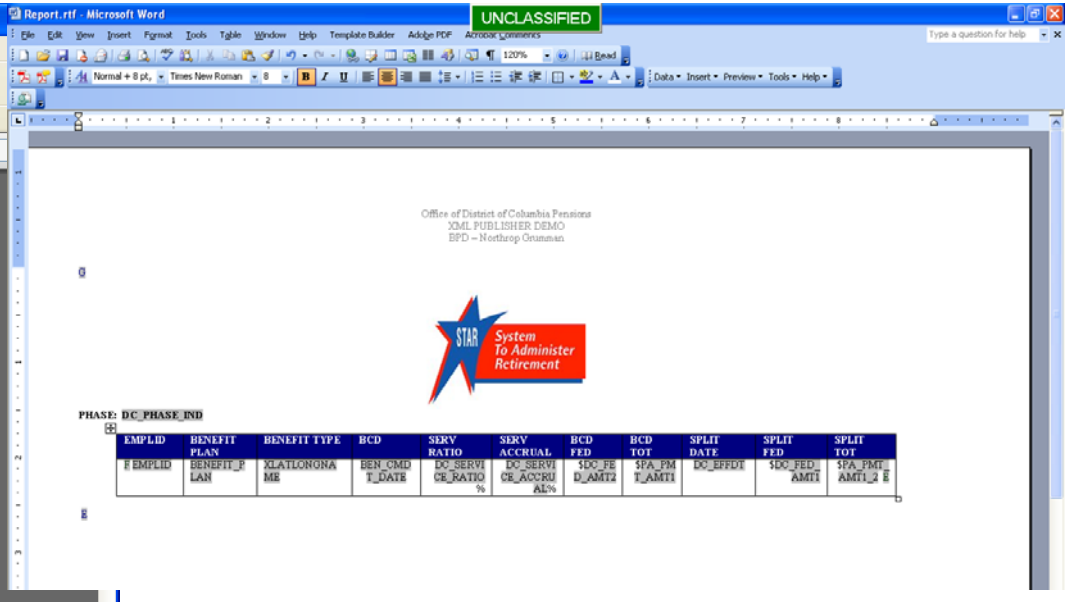
Functional
-More control
-Additional configuration options

Technical
-Reduce emphasis on coding
-Additional tech features

XML Publisher in 8.48/8.49/8.50

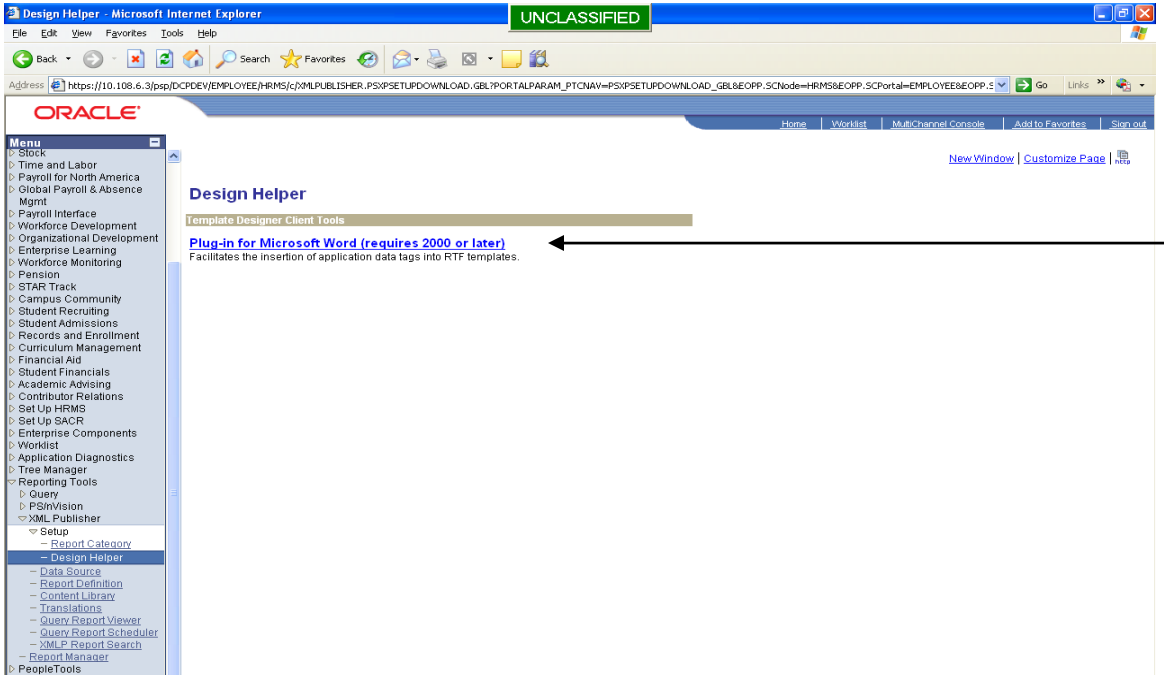
- **Delivered in 8.48/8.49/8.50**
  - **Leverages security**
- **Data Sources:**
  - **8.48/8.49 - PS Query, Rowset, XML-File & XML Doc**
  - **8.50 - PS Query, Connected Query, XML File**
- **Template Types:**
  - **PDF, RTF, eText & XSL**





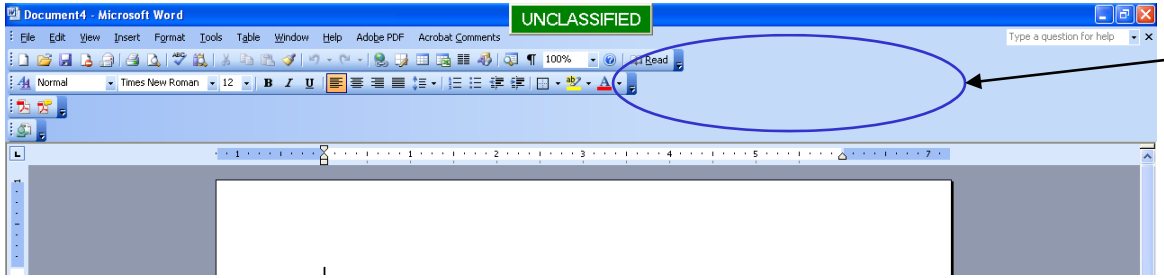
Configuring XML Publisher

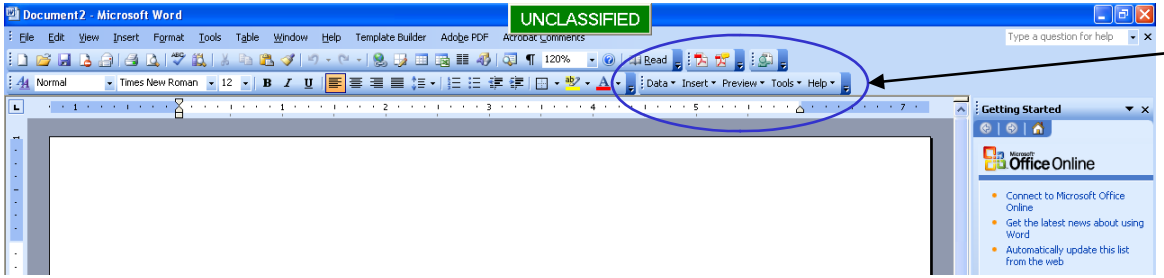
- **Download the XML Publisher Toolbar**
  - Login to PeopleSoft
  - Navigate: Home> Reporting Tools> XML Publisher> Setup> Design Helper



Configuring XML Publisher

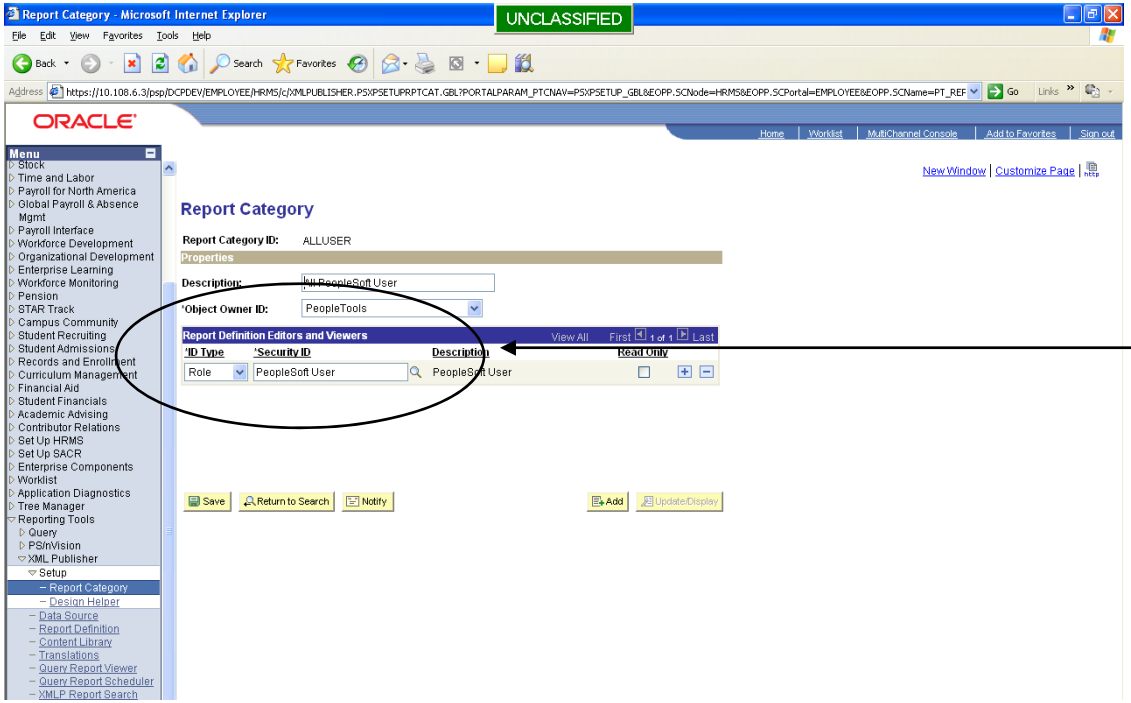
- **Unzip & Execute "xmlp_desktop.zip"**
  - Installs the XML Toolbar in Microsoft Word





Configuring XML Publisher

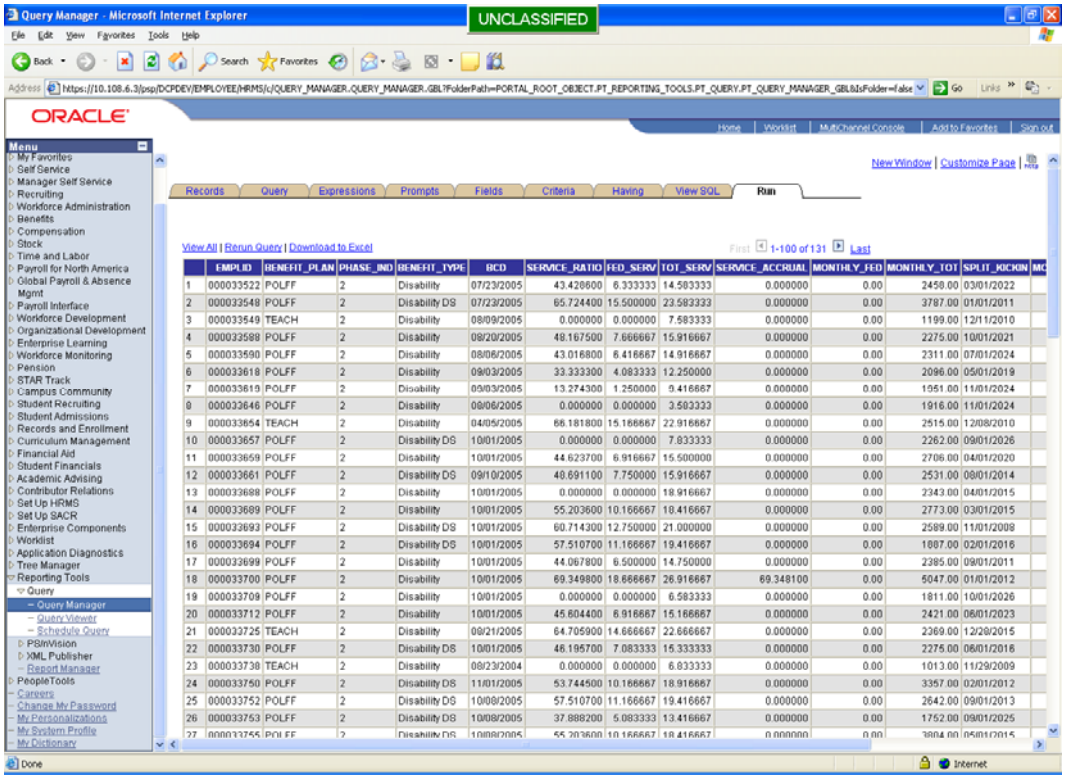
- **Create Report Category**
  - Predefine Editors/Viewers of a group of reports
  - Navigate: Home> Reporting Tools> XML Publisher> Setup> Report Category



Add/Remove: Roles or Users that will utilize the Reports in the category

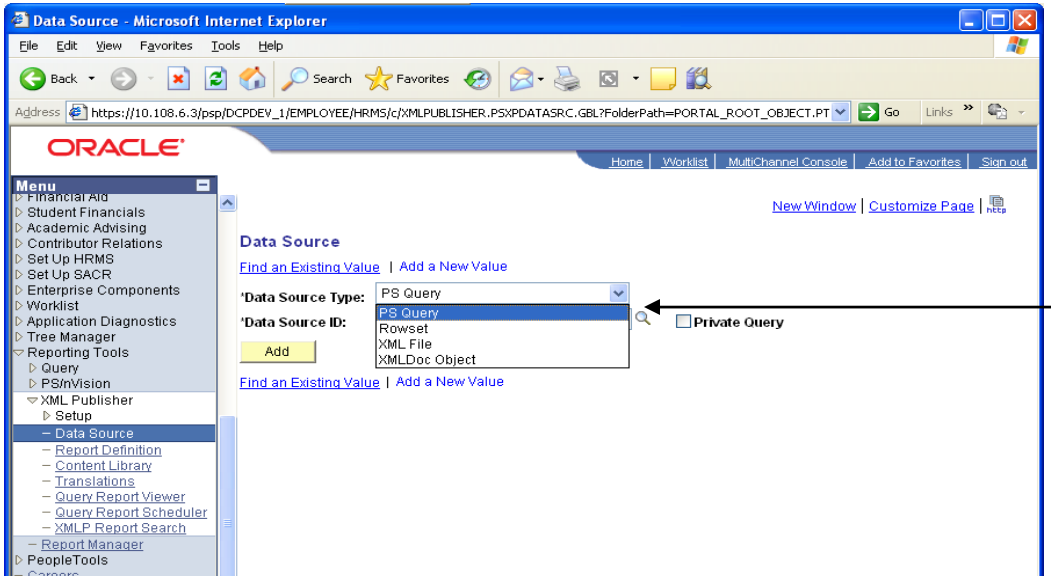
Creating an XML Publisher Report

- **Select/Create the PSQuery data source**
  - PSQuery Name: TEST_XML_DEMO
  - Navigate: Home> Reporting Tools> Query> Query Manager



Creating an XML Publisher Report

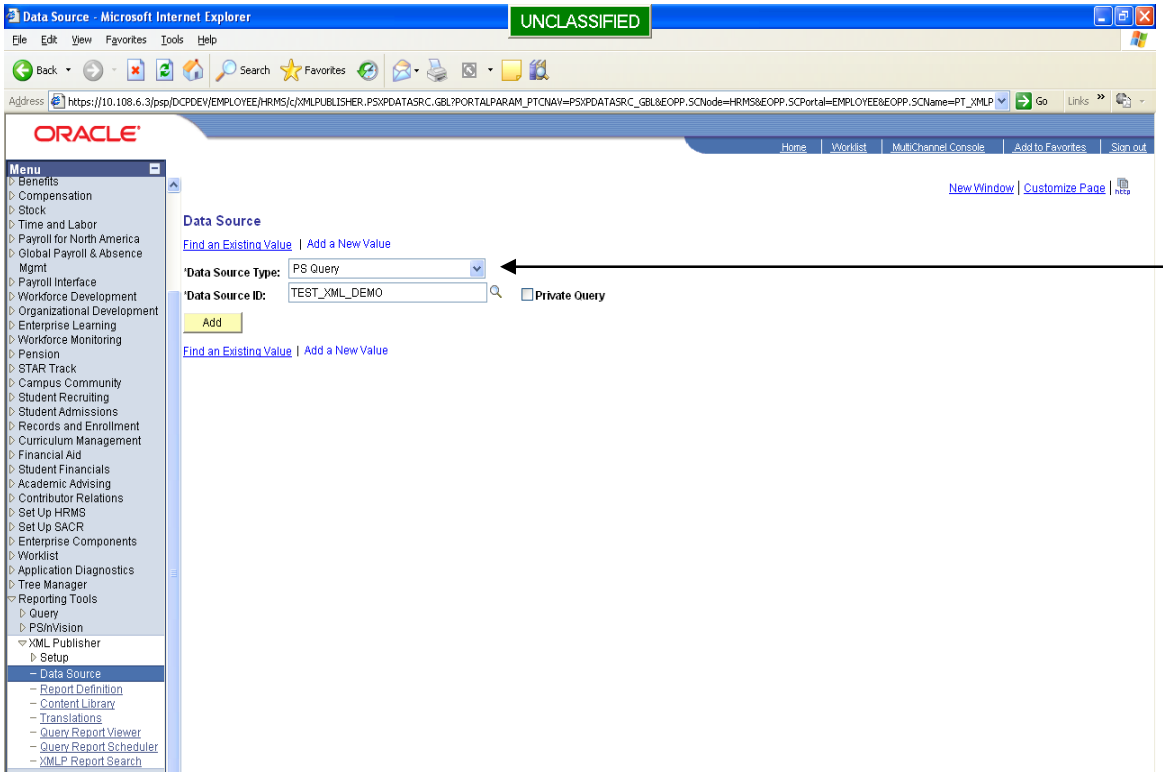
- **Identify Data Source**
  - PSQuery is preconfigured XML Data Source
  - Other Data Sources: Rowset, XML File, XMLDoc Object - Require Additional Config
  - Navigate: Home> Reporting Tools> XML Publisher> Data Source



Select Data Source

Creating an XML Publisher Report

- **Add New Data Source**
  - Navigate: Home> Reporting Tools> XML Publisher> Data Source



Data Source:

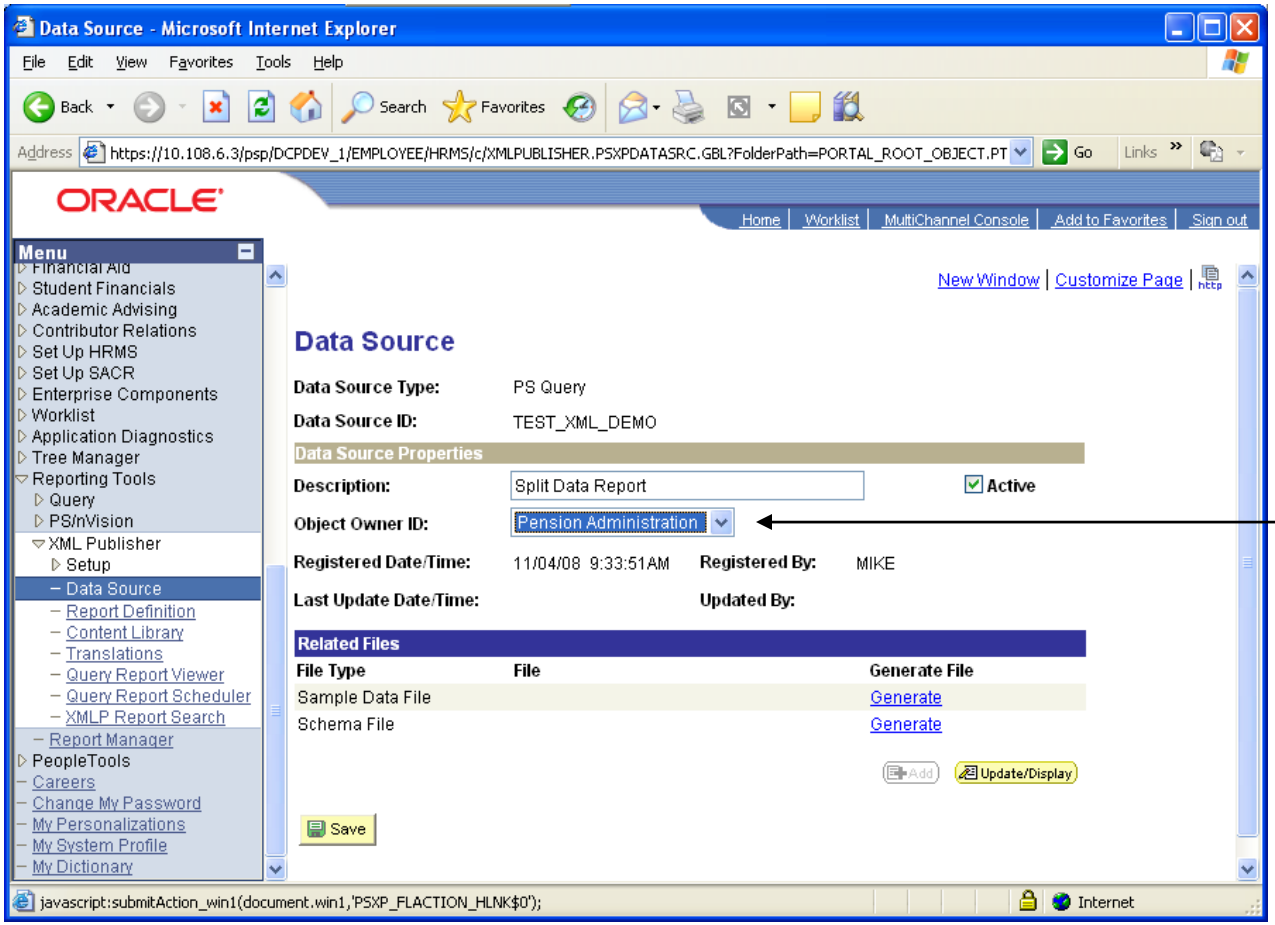
PSQuery

Query Name:

TEST_XML_DEMO

Creating an XML Publisher Report

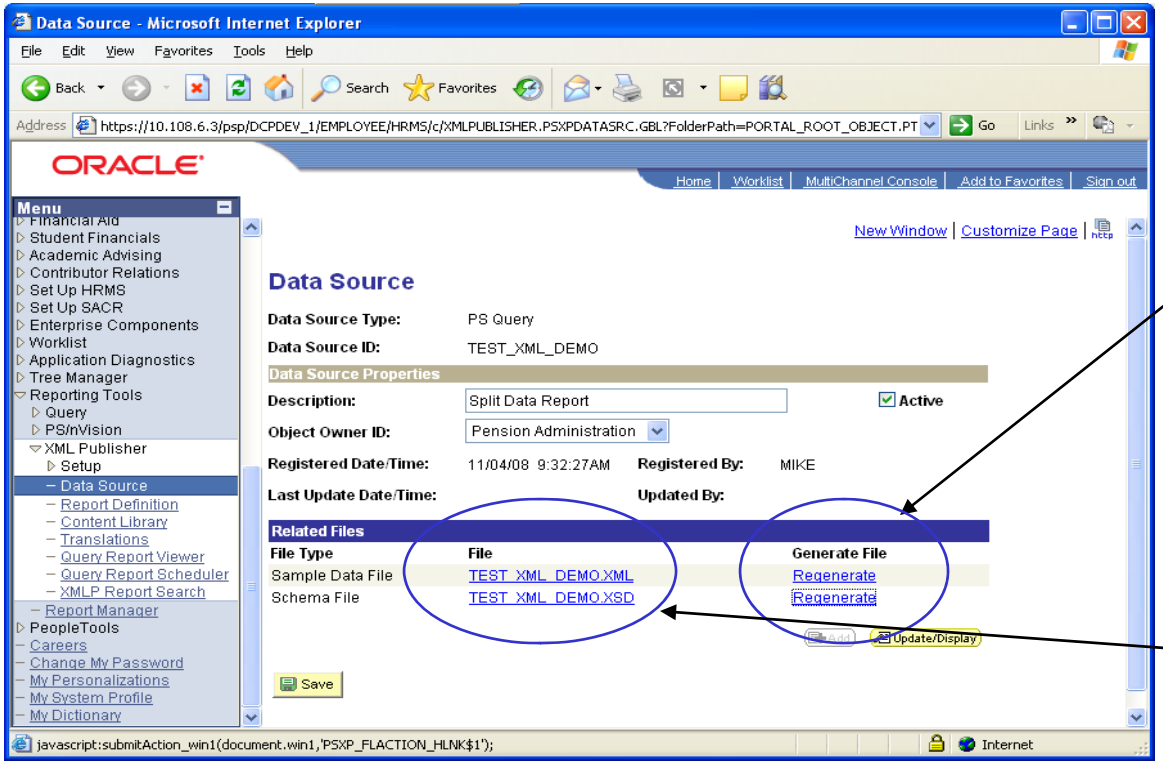
- **Enter Data Source description, and object owner**



Object Owner ID

Creating an XML Publisher Report

- **Generate & Save Sample Data File and Schema File**
  - The XML & XSD files are utilized by the Microsoft Word Design Helper



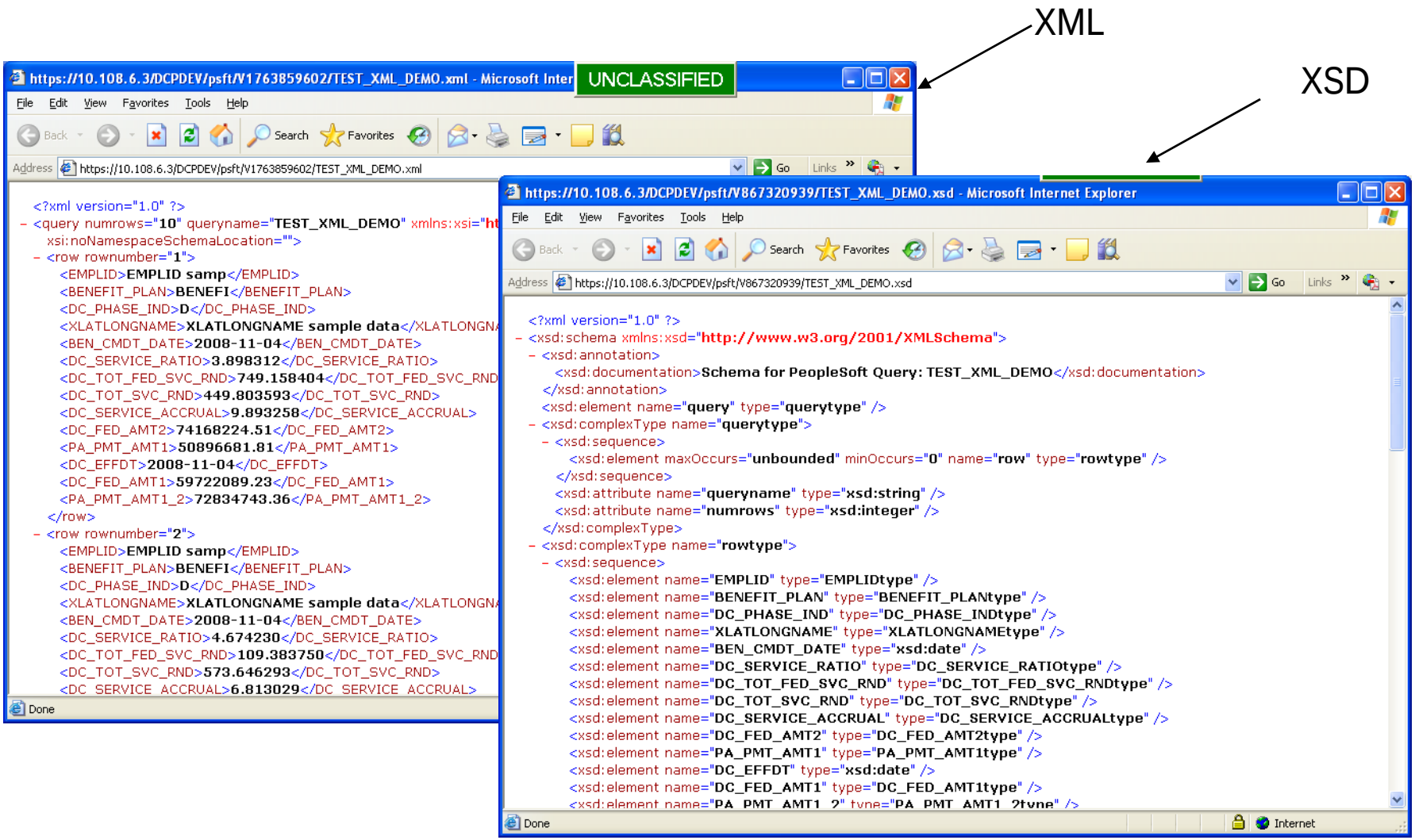
Step 1:

Click Generate for each item

Step 2:

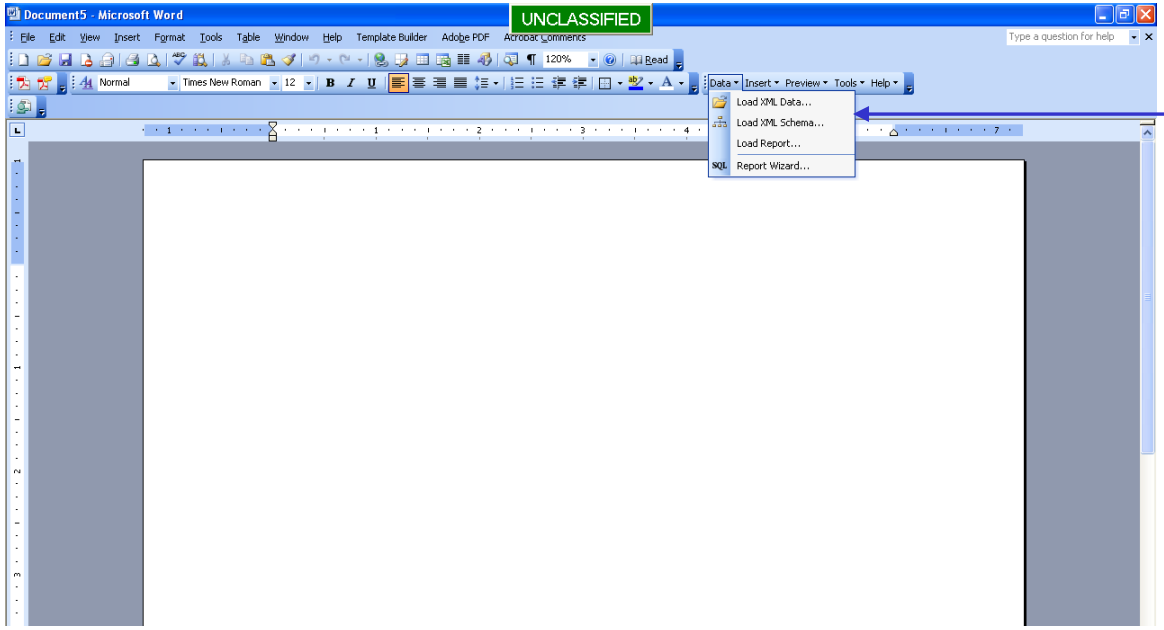
Click & Save XML and XSD file

Creating an XML Publisher Report



Creating an XML Publisher Report

- **Create Report template in Microsoft Word**
  - Import XML file generated from the Data Source creation
  - Import XSD file generated from the Data Source creation



"Template Builder" toolbar

Step 1:

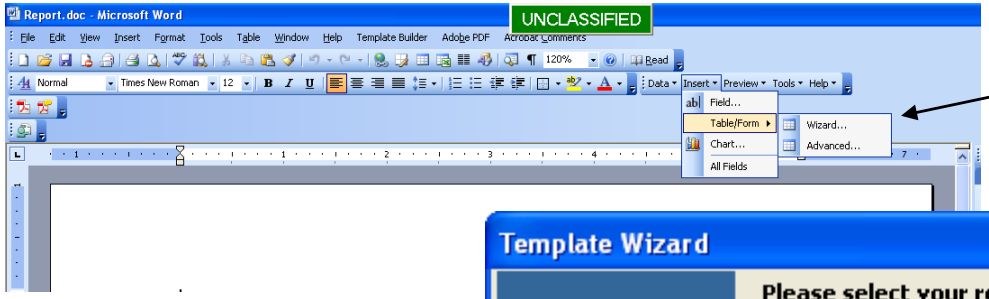
"Load XML Data"

Step 2:

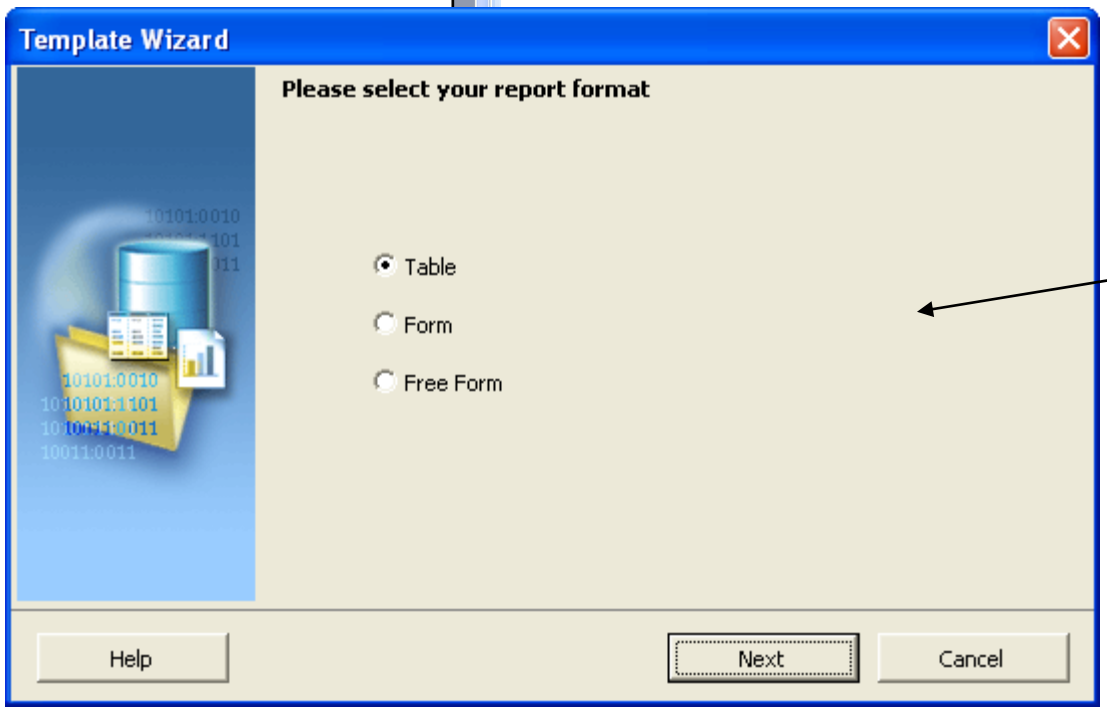
"Load XML Schema

Creating an XML Publisher Report

- **Insert Table from Wizard**



Select Wizard



Wizard Prompt

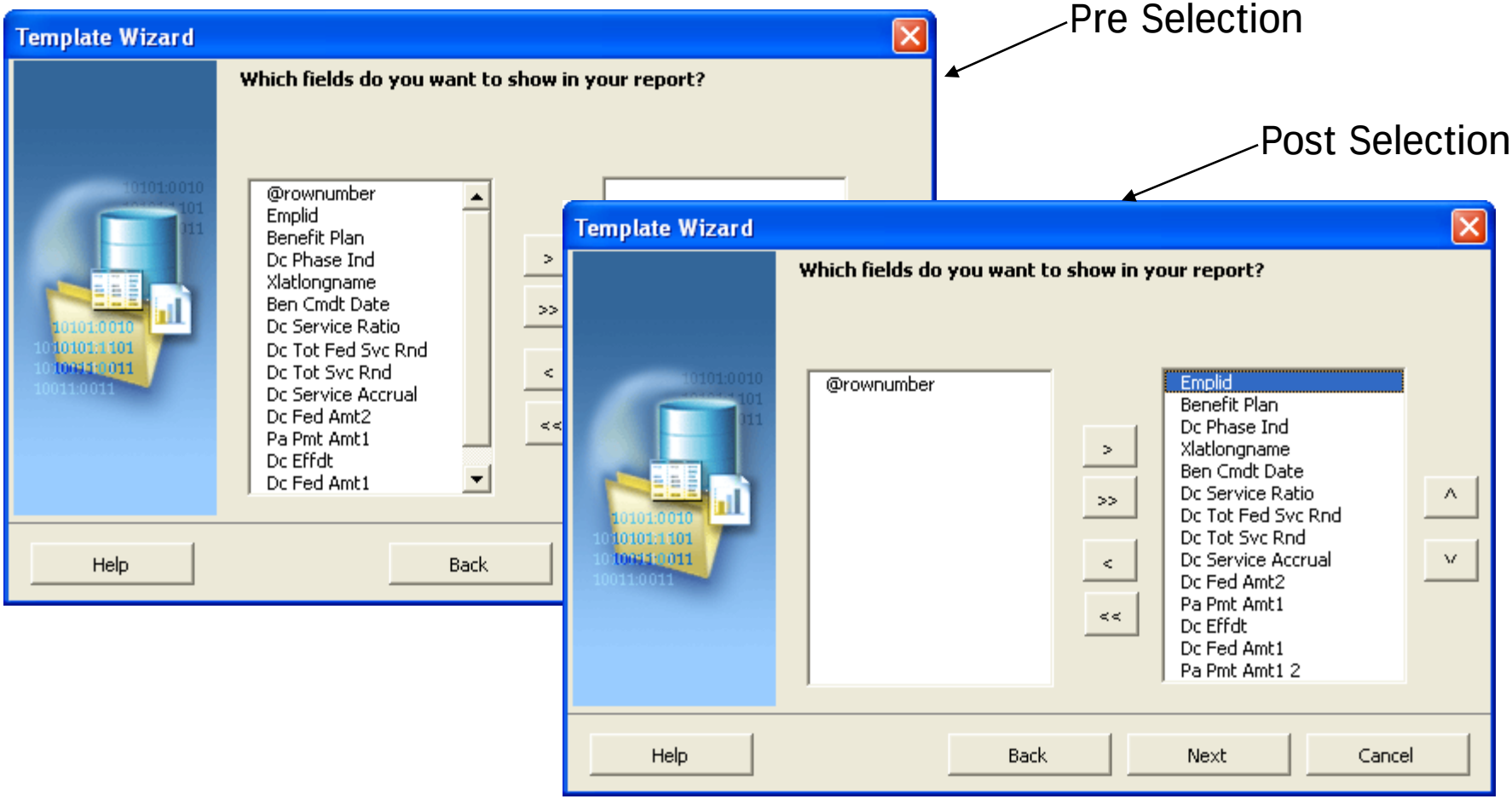
Creating an XML Publisher Report

- **Select table characteristics**

Select Query/Row

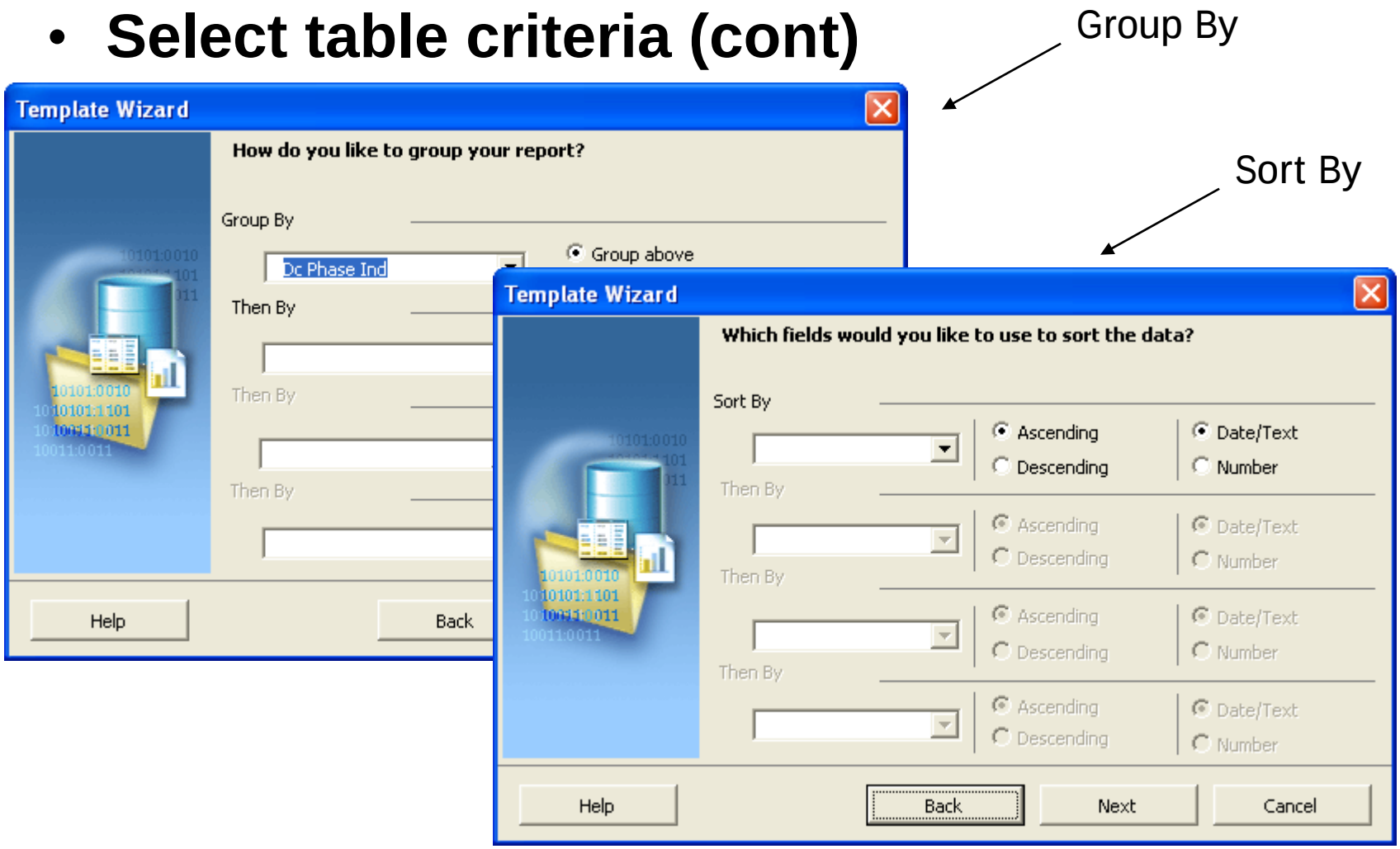
Creating an XML Publisher Report

- **Select fields from Data Source for Report**



Creating an XML Publisher Report

- **Select table criteria (cont)**



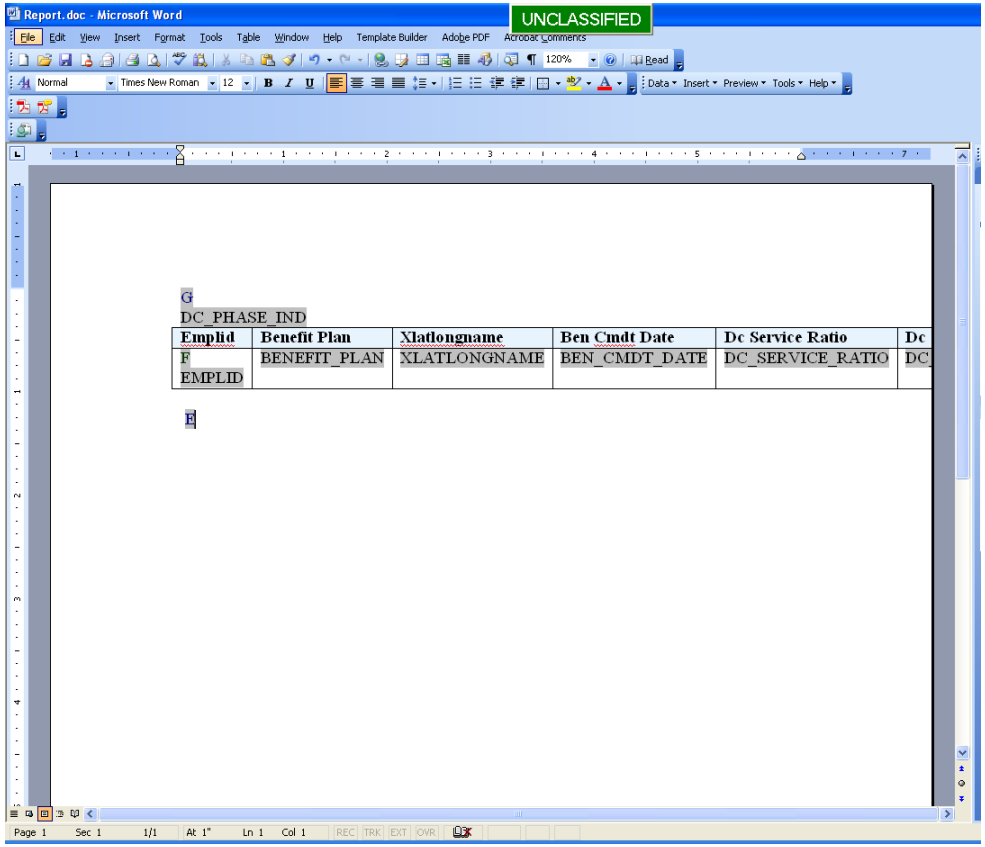
Creating an XML Publisher Report

- **Edit Fieldnames prior to table generation**
  - Fieldnames can be edited following generation of table

Field values

Creating an XML Publisher Report

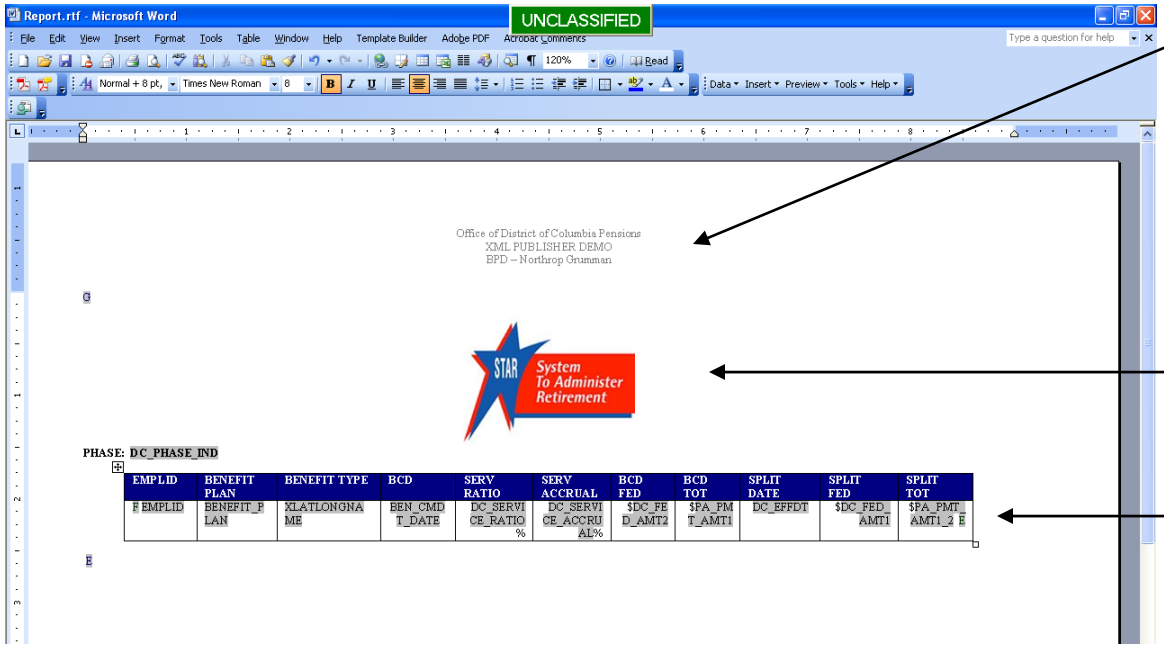
- **Initial table generated from wizard**



Original report now needs to be formatted to fit page

Creating an XML Publisher Report

- **Finalize report**
  - Update Fieldnames
  - Modify column lengths
  - Add Header/footer



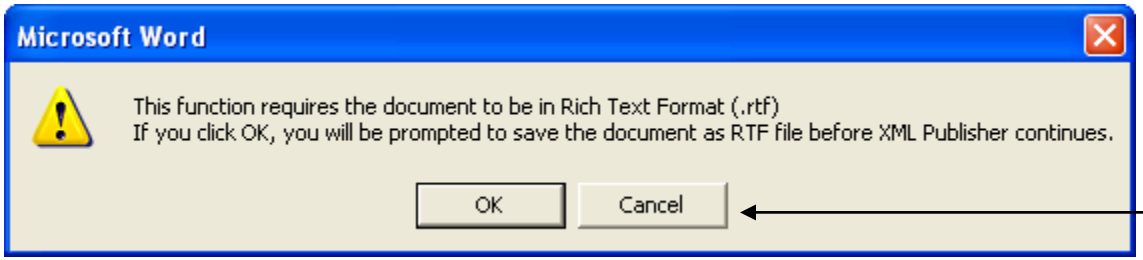
View> Header/Footer

Insert> Picture> From File

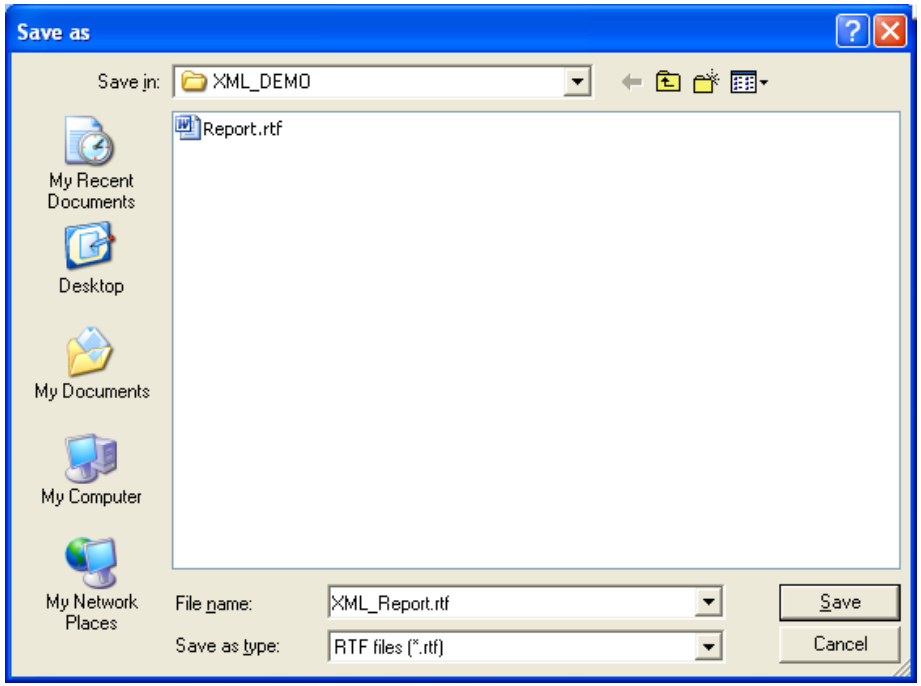
Edit Column Size, fonts, and shading

Creating an XML Publisher Report

- **Save as .RTF document & Preview as PDF**



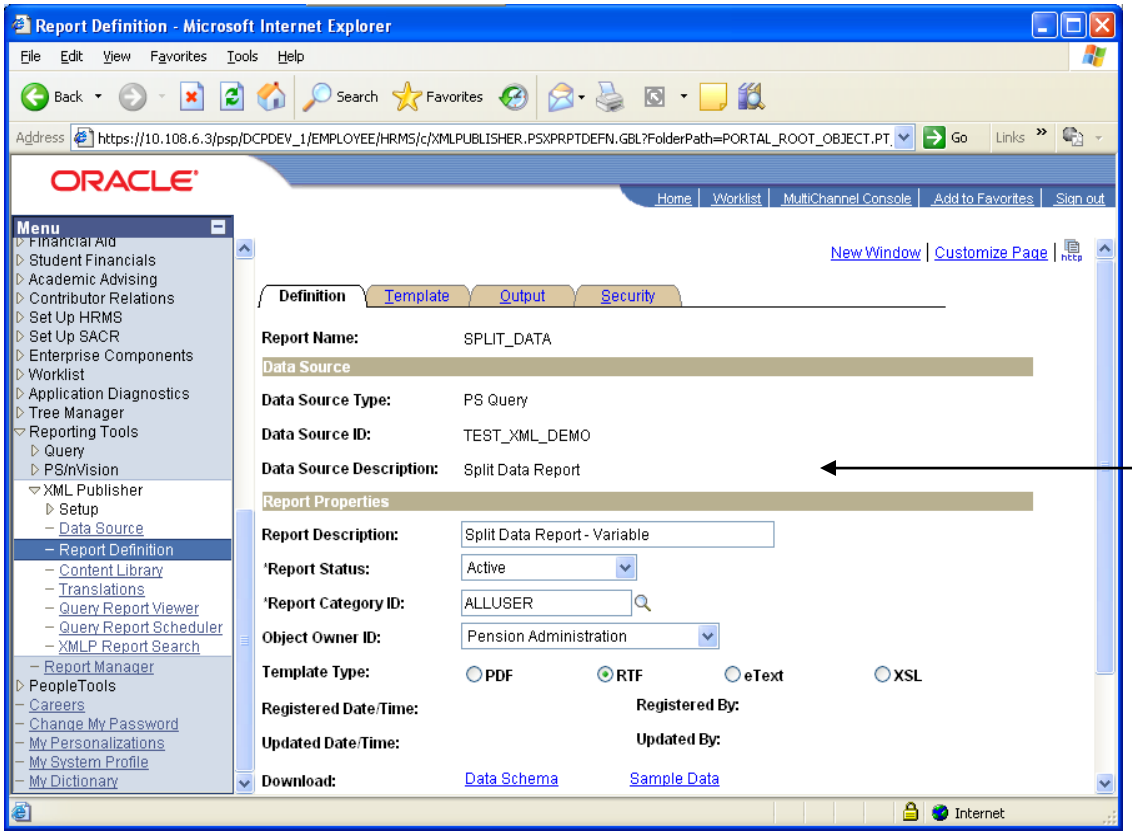
Click OK



Click Save

Creating an XML Publisher Report

- **Create Report Definition**
  - In the Definition tab: Enter Report Properties
  - Navigate: Home> Reporting Tools> XML Publisher> Report Definition



Step 1:

Enter values

Step 2:

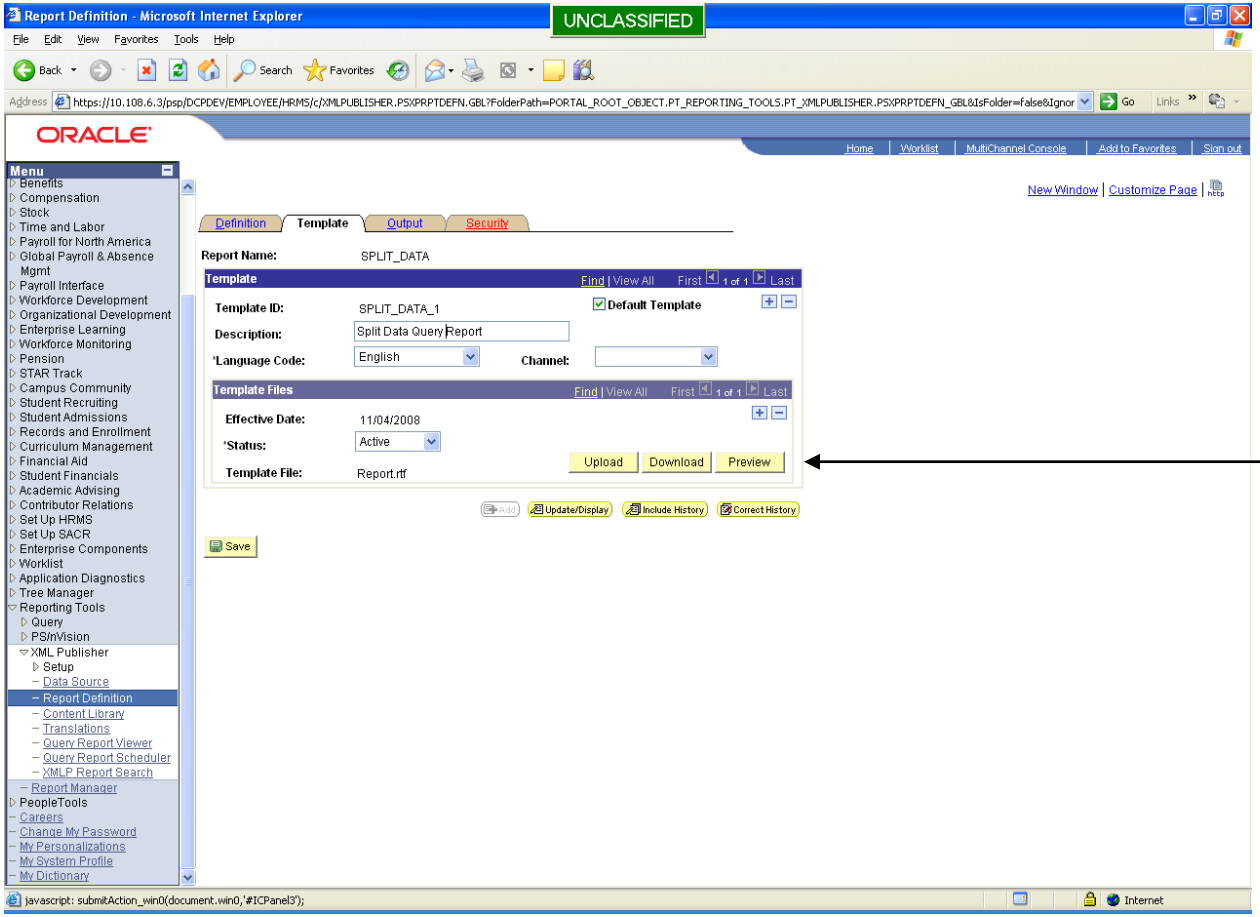
Change

“Report Status”

to **Active**

Creating an XML Publisher Report

- **Upload the template**
  - In the Template tab, upload the .RTF file

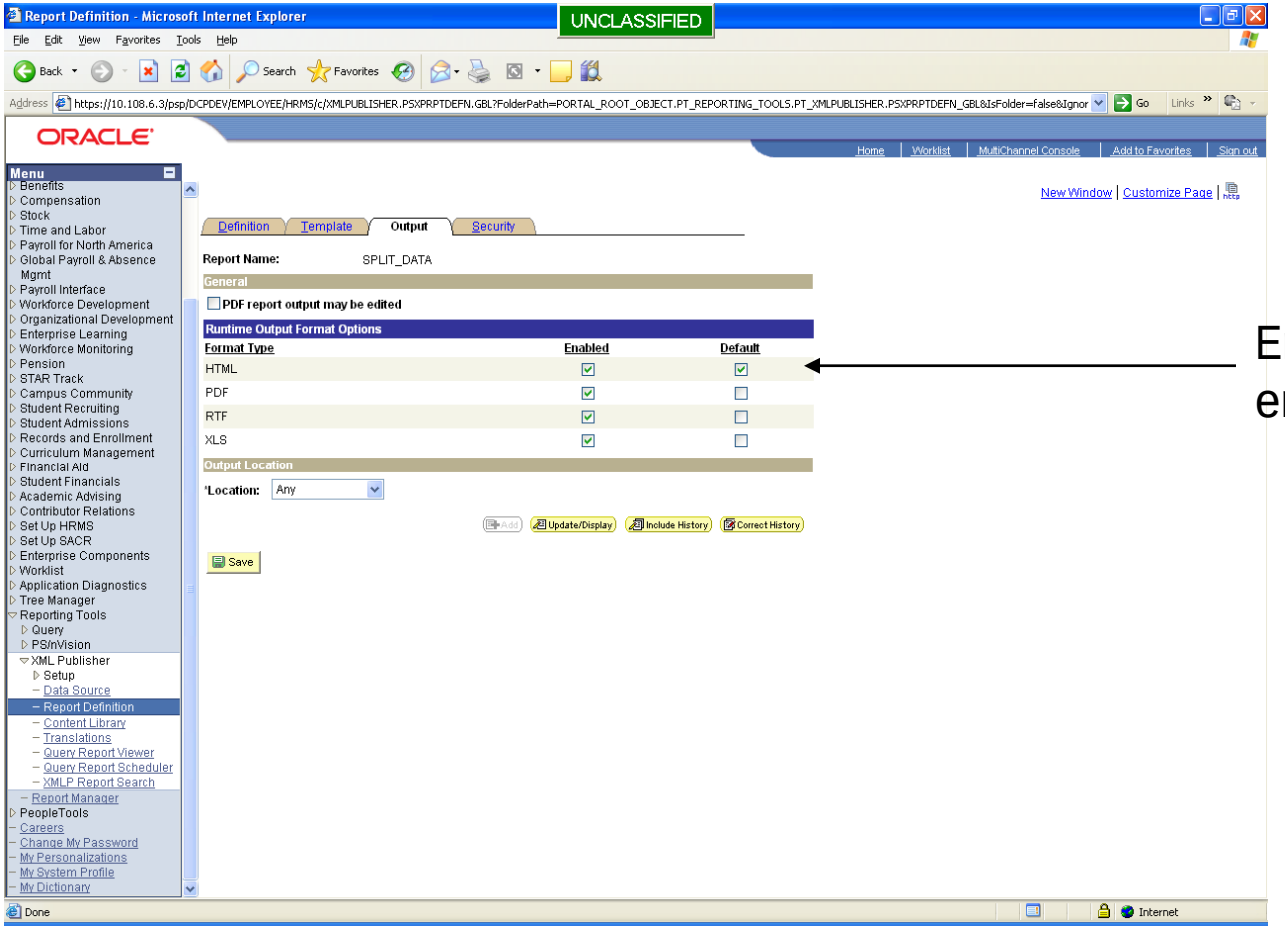


Enter Template description

Upload report.rtf

Creating an XML Publisher Report

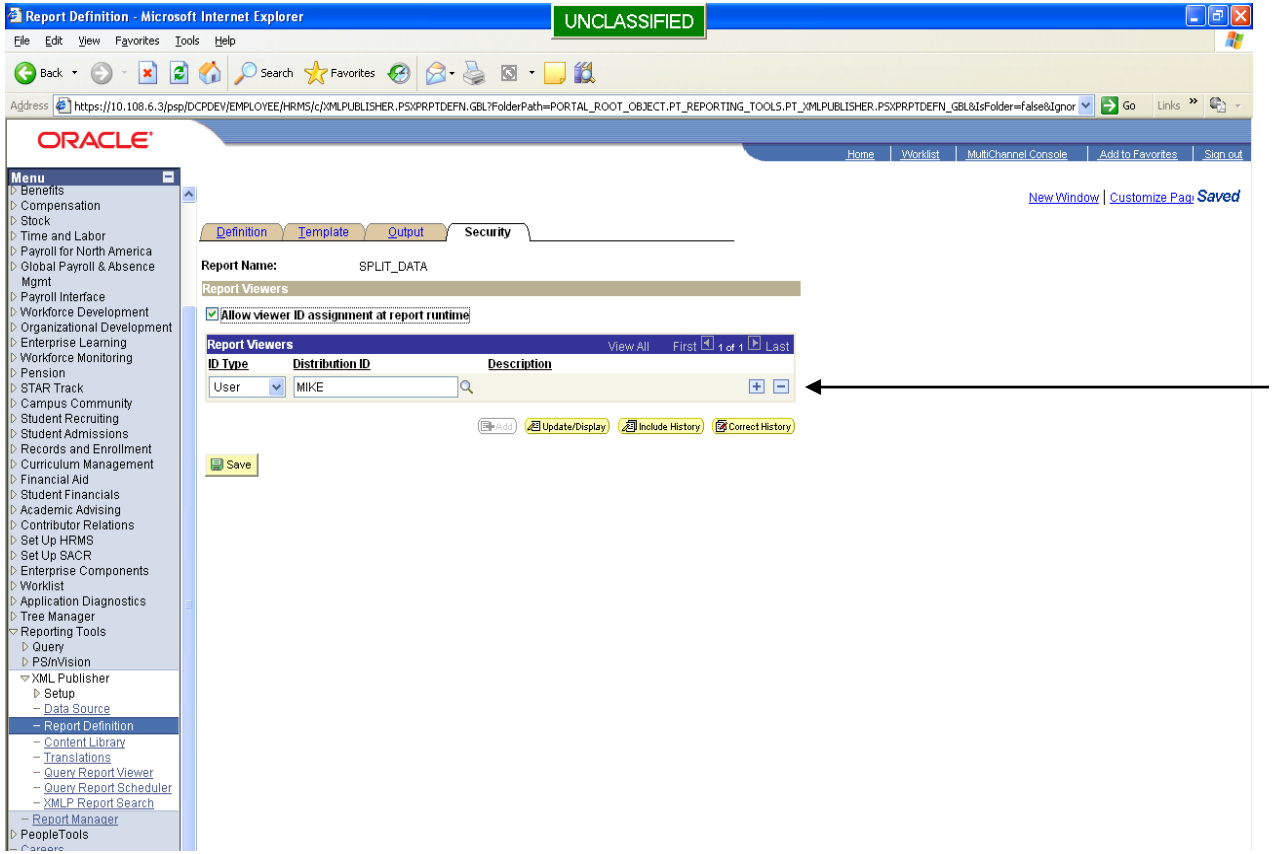
- **Select Output format Options**



Ensure PDF output is enabled

Creating an XML Publisher Report

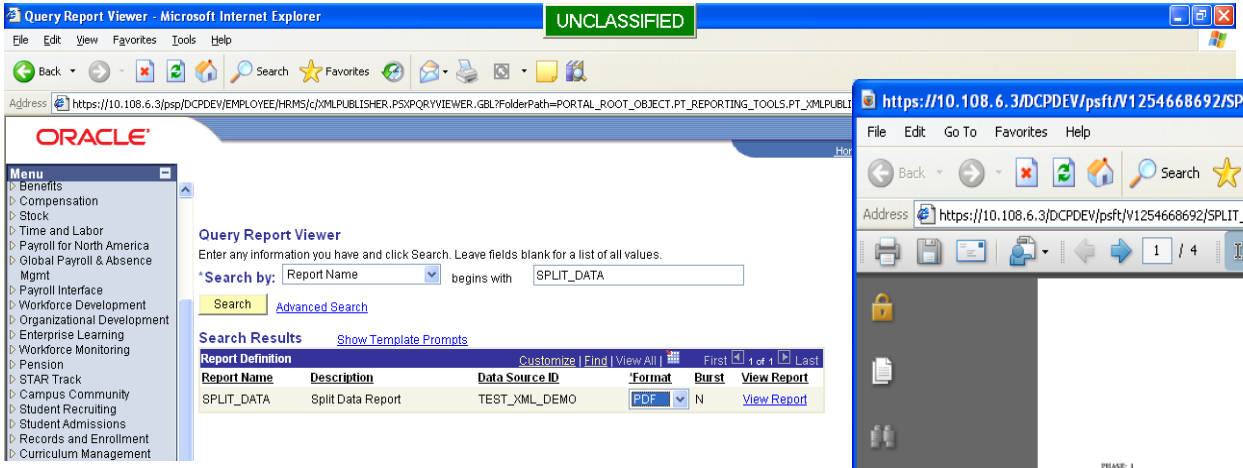
- **Update Report Viewer security**
  - Save Report Definition

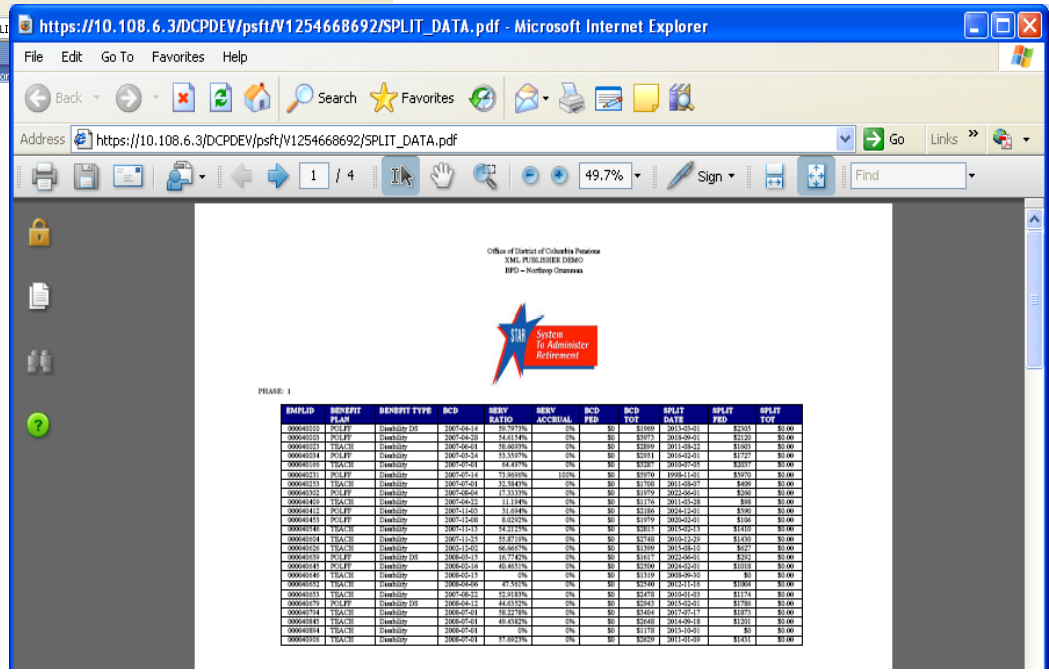


Add/Remove Users & Roles

Run Query Report Viewer

- **Select Report & Output Format**
  - Run Report
  - Navigate: Home> Reporting Tools> XML Publisher> Query Report Viewer





DEMO – Creating an XML Publisher Report

New Features Delivered in 8.50

1. Updated version of the Template Builder is available
2. A new Application Engine is available to clean up orphaned XML Publisher files
3. A File Name field has been added to the Report Definition Output page that is used to specify a file name template that gets translated at runtime to a physical file name
4. The Rowset and XMLDoc data sources have been deprecated
5. Connected Query has been added as a data source
6. Schema files are no longer necessary for bursting, sample data file can be used for bursting
7. Email has been added as an output option for XML Publisher reports

New Features Delivered in 8.50 (cont.)

8. A Global Properties page has been added to define properties shared by all reports and override xdo engine default property values. The property groups available are: PDF Output, FO Processing, HTML Output, PDF Security, PDF Template, RTF Output, RTF Template.
9. XML generation for query data source is now in C++ which provides better performance and less memory usage. A new XMLDoc to XML API has been created which provides better performance and less memory usage.
10. Full path mapping has been added as an option when defining the template for a report
11. An option has been added on the report definition to use an alternate XML file for previewing
12. You can download and upload (override) the same effective dated template file

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