

PeopleSoft Business Intelligence (Formally XML Publisher)

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System Efficiency

Introduction

With our dynamic workforce today many organizations have programs or reports written by individuals whom are no longer employed or engaged by the organization. When a modification needs to made to one of these legacy reports, research is required to figure out how and where to make this change. XML attempts to overcome this issue by creating output documents that should be human-legible and reasonably clear. The technology provided by PeopleSoft and Oracle provides a solution to these real world issues and at times reduces the number modification needed to produce the desired results.

XML Advantages

XML is both self-defining and self-documenting format which describes data structures and field names. Provides an open solution stored in plain text without license restrictions. Most of all it is unencumbered by changes in technology and platforms.

XML Examples

Syntax

```
<name attribute="value">content</name>
```

XML Example from PeopleSoft

```
<?xml version="1.0" ?>
- <query numRows="10" queryname="XRFWIN" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:noNamespaceSchemaLocation="">
- <row rownumber="1">
  <MENU_NAME>MENU_NAME sample data</MENU_NAME>
  </row>
- <row rownumber="2">
  <MENU_NAME>MENU_NAME sample data</MENU_NAME>
  </row>
- <row rownumber="3">
  <MENU_NAME>MENU_NAME sample data</MENU_NAME>
  </row>
- <row rownumber="4">
  <MENU_NAME>MENU_NAME sample data</MENU_NAME>
  </row>
- <row rownumber="5">
  <MENU_NAME>MENU_NAME sample data</MENU_NAME>
  </row>
- <row rownumber="6">
  <MENU_NAME>MENU_NAME sample data</MENU_NAME>
  </row>
- <row rownumber="7">
```

```

<MENUNAME>MENUNAME sample data</MENUNAME>
</row>
- <row rownumber="8">
  <MENUNAME>MENUNAME sample data</MENUNAME>
  </row>
- <row rownumber="9">
  <MENUNAME>MENUNAME sample data</MENUNAME>
  </row>
- <row rownumber="10">
  <MENUNAME>MENUNAME sample data</MENUNAME>
  </row>
</query>

```

Business Intelligence (Formally XML Publisher) by Example

This white paper assumes the user is familiar with PeopleSoft, Microsoft Word, and Oracle Publisher Enterprise and can navigate the system without additional instructions. A report will be created for use only in PeopleSoft taking advantage of functionality only found within PeopleSoft application.

Navigate to the Reporting Tools in PeopleSoft drilling through the XML Publisher to the Data Source portal entry. Select data source of PS Query this query needs to exist before you try to create an XML report for the query. Type a description for the Data Source, make this as descriptive as the field allows since this data element is searchable and the more descriptive the more readily you can identify the report. Select the Object Owner ID, in this example utilized PeopleTools. Generate a Sample Data File and download this to the desktop. This will be utilized in the XML Template Builder when creating the template. Generate a Schema File while not used for the example it is required by the application to function properly. Save the Data Source and open Microsoft Word.

Create a new document if one does not default open. Navigate to the Template Builder menu which Oracle has installed with the Template Builder. Select Data, and Load the XML Data this will create references in your document to the XML data that will be utilized to create a report once PeopleSoft executes it. Design the document at this point you are creating a Layout which may be updated independently of the data elements. View the document in HTML or whatever is the final output desired. Do this by navigating to Tools Preview and selecting the final format. Once that is complete add the data elements to the document by Navigating to the Template Builder and selecting Insert Field. Proceed to select the desire data elements to create your final output document. Once again Preview the document utilizing the Preview tool in the Template Builder menu. Save the document as an RTF file.

Once the desire reporting format has been achieved the document is ready for upload to PeopleSoft. Navigate to Reporting Tools and drill into the XML Publisher, Report Definition. Create a New Definition, create a Report Name and Data Source description that will assist you in you determination of what Data Source ID ties back to the Report. You do not have to activate the report at this time, for this exercise it will be active. Place the report in the appropriate Report Category ID. For the exercise select ALLUSER. The Object Owner ID will once again be PeopleTools, and the template type is RTF. The template must be uploaded to the application, to do this select the Template tab and Upload the file, make certain that the effective date is today or older or it will not show up in your search to run the report. Make the RTF Template file active as well. Save the Report Definition. Verify that the template upload correctly by clicking the Preview button. Another browser window will open and the report Layout will display just as it did during the Preview testing in Microsoft Word.

To run the Report and see actual output data navigate to the Query Report Viewer. Select on the output format for the final report and select View Report. If there are Prompts in your query the View Report will utilize those prompts and once then output the results to a new window. The report now displays with the actual data output.

The report may be submitted in batch mode. When submitting the report in batch mode the report will have the same run options as when it was originally created.

Query Security

If PeopleSoft RowLevel security is enabled the report will utilize the security base on query security.

Query Maintenance

Modifications of the Query will not impact the report nor will any modification be needed unless a field has been removed or renamed.

Conclusion

Oracle XML Publisher in conjunction with the PeopleSoft Query tool provides a safe secure and flexible mythology to providing reports to the organization. The tool allows the customer to utilize the desktop tools they are already familiar with and in most cases created to perform the task of form design.