
Enterprise PeopleTools 8.48 PeopleBook: XML Publisher for PeopleSoft Enterprise

June 2006

Enterprise PeopleTools 8.48 PeopleBook: XML Publisher for PeopleSoft Enterprise
SKU PT848XML-B 0606
Copyright © 1988-2006, Oracle. All rights reserved.

The Programs (which include both the software and documentation) contain proprietary information; they are provided under a license agreement containing restrictions on use and disclosure and are also protected by copyright, patent, and other intellectual and industrial property laws. Reverse engineering, disassembly, or decompilation of the Programs, except to the extent required to obtain interoperability with other independently created software or as specified by law, is prohibited.

The information contained in this document is subject to change without notice. If you find any problems in the documentation, please report them to us in writing. This document is not warranted to be error-free. Except as may be expressly permitted in your license agreement for these Programs, no part of these Programs may be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose.

If the Programs are delivered to the United States Government or anyone licensing or using the Programs on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the Programs, including documentation and technical data, shall be subject to the licensing restrictions set forth in the applicable Oracle license agreement, and, to the extent applicable, the additional rights set forth in FAR 52.227-19, Commercial Computer Software--Restricted Rights (June 1987). Oracle Corporation, 500 Oracle Parkway, Redwood City, CA 94065.

The Programs are not intended for use in any nuclear, aviation, mass transit, medical, or other inherently dangerous applications. It shall be the licensee’s responsibility to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of such applications if the Programs are used for such purposes, and we disclaim liability for any damages caused by such use of the Programs.

The Programs may provide links to Web sites and access to content, products, and services from third parties. Oracle is not responsible for the availability of, or any content provided on, third-party Web sites. You bear all risks associated with the use of such content. If you choose to purchase any products or services from a third party, the relationship is directly between you and the third party. Oracle is not responsible for: (a) the quality of third-party products or services; or (b) fulfilling any of the terms of the agreement with the third party, including delivery of products or services and warranty obligations related to purchased products or services. Oracle is not responsible for any loss or damage of any sort that you may incur from dealing with any third party.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Open Source Disclosure

Oracle takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in Oracle’s PeopleSoft products and the following disclaimers are provided.

Apache Software Foundation

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>). Copyright © 2000-2003. The Apache Software Foundation. All rights reserved. Licensed under the Apache License, Version 2.0 (the “License”); you may not use this file except in compliance with the License. You may obtain a copy of the License at <http://www.apache.org/licenses/LICENSE-2.0>.

Unless required by applicable law or agreed to in writing, software distributed under the License is distributed on an “AS IS” BASIS, WITHOUT WARRANTIES OR CONDITIONS OF ANY KIND, either express or implied. See the License for the specific language governing permissions and limitations under the License.

OpenSSL

Copyright © 1998-2005 The OpenSSL Project. All rights reserved.

This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (<http://www.openssl.org/>).

THIS SOFTWARE IS PROVIDED BY THE OpenSSL PROJECT “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE OpenSSL PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Loki Library

Copyright © 2001 by Andrei Alexandrescu. This code accompanies the book: Alexandrescu, Andrei. “Modern C++ Design: Generic Programming and Design Patterns Applied”. Copyright © 2001 Addison-Wesley. Permission to use, copy, modify, distribute and sell this software for any purpose is hereby granted without fee, provided that the above copyright notice appear in all copies and that both that copyright notice and this permission notice appear in supporting documentation.

Helma Project

Copyright © 1999-2004 Helma Project. All rights reserved. THIS SOFTWARE IS PROVIDED “AS IS” AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE HELMA PROJECT OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Helma includes third party software released under different specific license terms. See the licenses directory in the Helma distribution for a list of these license.

Sarissa

Copyright © 2004 Manos Batsis.

This library is free software; you can redistribute it and/or modify it under the terms of the GNU Lesser General Public License as published by the Free Software Foundation; either version 2.1 of the License, or (at your option) any later version.

This library is distributed in the hope that it will be useful, but WITHOUT ANY WARRANTY; without even the implied warranty of MERCHANTABILITY or FITNESS FOR A PARTICULAR PURPOSE. See the GNU Lesser General Public License for more details.

You should have received a copy of the GNU Lesser General Public License along with this library; if not, write to the Free Software Foundation, Inc., 59 Temple Place, Suite 330, Boston, MA 02111-1307 USA.

ICU

ICU License - ICU 1.8.1 and later COPYRIGHT AND PERMISSION NOTICE Copyright © 1995-2003 International Business Machines Corporation and others. All rights reserved.

Permission is hereby granted, free of charge, to any person obtaining a copy of this software and associated documentation files (the "Software"), to deal in the Software without restriction, including without limitation the rights to use, copy, modify, merge, publish, distribute, and/or sell copies of the Software, and to permit persons to whom the Software is furnished to do so, provided that the above copyright notice(s) and this permission notice appear in all copies of the Software and that both the above copyright notice(s) and this permission notice appear in supporting documentation. THE SOFTWARE IS PROVIDED "AS IS," WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO THE WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT OF THIRD PARTY RIGHTS. IN NO EVENT SHALL THE COPYRIGHT HOLDER OR HOLDERS INCLUDED IN THIS NOTICE BE LIABLE FOR ANY CLAIM, OR ANY SPECIAL INDIRECT OR CONSEQUENTIAL DAMAGES, OR ANY DAMAGES WHATSOEVER RESULTING FROM LOSS OF USE, DATA OR PROFITS, WHETHER IN AN ACTION OF CONTRACT, NEGLIGENCE OR OTHER TORTIOUS ACTION, ARISING OUT OF OR IN CONNECTION WITH THE USE OR PERFORMANCE OF THIS SOFTWARE. Except as contained in this notice, the name of a copyright holder shall not be used in advertising or otherwise to promote the sale, use or other dealings in this Software without prior written authorization of the copyright holder.

All trademarks and registered trademarks mentioned herein are the property of their respective owners.

Sun's JAXB Implementation – JSDK 1.5 relaxngDatatype.jar 1.0 License

Copyright © 2001, Thai Open Source Software Center Ltd, Sun Microsystems. All rights reserved.

THIS SOFTWARE IS PROVIDED BY THE COPYRIGHT HOLDERS AND CONTRIBUTORS "AS IS" AND ANY EXPRESS OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE REGENTS OR CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

W3C IPR SOFTWARE NOTICE

Copyright © 2000 World Wide Web Consortium, (Massachusetts Institute of Technology, Institut National de Recherche en Informatique et en Automatique, Keio University). All Rights Reserved.

Note: The original version of the W3C Software Copyright Notice and License could be found at <http://www.w3.org/Consortium/Legal/copyright-software-19980720>.

THIS SOFTWARE AND DOCUMENTATION IS PROVIDED "AS IS," AND COPYRIGHT HOLDERS MAKE NO REPRESENTATIONS OR WARRANTIES, EXPRESS OR IMPLIED, INCLUDING BUT NOT LIMITED TO, WARRANTIES OF MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE OR THAT THE USE OF THE SOFTWARE OR DOCUMENTATION WILL NOT INFRINGE ANY THIRD PARTY PATENTS, COPYRIGHTS, TRADEMARKS OR OTHER RIGHTS. COPYRIGHT HOLDERS WILL NOT BE LIABLE FOR ANY DIRECT, INDIRECT, SPECIAL OR CONSEQUENTIAL DAMAGES ARISING OUT OF ANY USE OF THE SOFTWARE OR DOCUMENTATION.

Contents

General Preface

- About This PeopleBookix**
- PeopleSoft Enterprise Application Prerequisites.....ix
- Application Fundamentals.....ix
- Documentation Updates and Printed Documentation.....x
 - Obtaining Documentation Updates.....x
 - Downloading and Ordering Printed Documentation.....x
- Additional Resources.....xi
- Typographical Conventions and Visual Cues.....xii
 - Typographical Conventions.....xii
 - Visual Cues.....xiii
 - Country, Region, and Industry Identifiers.....xiii
 - Currency Codes.....xiv
- Comments and Suggestions.....xiv
- Common Elements Used in PeopleBooks.....xiv

Preface

- XML Publisher for PeopleSoft Enterprise Preface.....xvii**
- XML Publisher for PeopleSoft Enterprise Preface.....xvii

Chapter 1

- Getting Started with XML Publisher.....1**
- XML Publisher Overview.....1
- XML Publisher Implementation.....2

Chapter 2

- Understanding XML Publisher.....5**
- XML Publisher Business Processes.....5
- XML Publisher Security.....6

Chapter 3

- Setting Up XML Publisher.....9**

Preparing to Use XML Publisher.....9
 Pages Used to Set Up XML Publisher.....9
 Defining XML Publisher Global Engine Settings.....9
 Setting Up Report Categories.....10
 Working with Template Design Helpers.....11

Chapter 4

Using XML Publisher.....13

Creating Report Definitions.....13
 Understanding Report Definitions.....13
 Pages Used to Create Report Definitions.....14
 Defining Reports.....14
 Associating Templates.....17
 Setting Output Options.....19
 Setting Security Options.....21
 Setting Bursting Options.....22
 Registering Data Sources.....26
 Understanding Data Source Registration.....26
 Page Used to Register Data Sources.....26
 Registering Data Sources.....26
 Using the Content Library to Maintain Sub-templates.....28
 Understanding Sub-templates.....29
 Page Used to Maintain Sub-templates.....29
 Maintaining Sub-templates.....29
 Maintaining Template Translations.....31
 Understanding Template Translations.....31
 Pages Used to Maintain Template Translations.....32
 Searching Template Translations.....32
 Maintaining Template Translations.....33
 Running XML Publisher Reports.....36
 Pages Used to Run XML Publisher Reports.....36
 Running Reports in Query Report Viewer.....36
 Scheduling Reports in Query Report Scheduler.....37
 Searching the XML Publisher Report Repository.....39

Appendix A

Working with XML Publisher Technology.....43

Managing Objects.....43

Creating a Custom Report.....43

 Understanding Custom Reports.....44

 Choosing a Template.....44

 Passing Parameters.....45

 Bursting Reports.....45

Running Reports.....45

 Using the Process Scheduler Request Page.....46

 Customizing Printed Report Output.....46

 Distributing Reports.....47

 Searching for Reports.....47

 Monitoring Requests.....47

Appendix B

Creating Report Templates.....49

RTF Templates.....49

 Creating RTF Templates.....49

 Incorporating Sub-templates.....50

 Including Images.....51

PDF Templates.....52

 Working with PDF Templates.....53

 Creating PDF Templates.....53

 Mapping Data Tags.....54

eText Templates.....55

XSL Templates.....55

Glossary of PeopleSoft Enterprise Terms.....57

Index79

About This PeopleBook

PeopleSoft Enterprise PeopleBooks provide you with the information that you need to implement and use PeopleSoft Enterprise applications from Oracle.

This preface discusses:

- PeopleSoft Enterprise application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft Enterprise applications are defined in this preface.

PeopleSoft Enterprise Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft Enterprise applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft Enterprise menus, pages, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft Enterprise applications most effectively.

Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft Enterprise applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft Enterprise applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download and order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your PeopleBooks Library. You'll find a variety of useful and timely materials, including updates to the full line of PeopleSoft Enterprise documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your PeopleBook CD-ROM, Oracle makes PeopleSoft Enterprise documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of PeopleSoft Enterprise documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021.

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

| Resource | Navigation |
|---------------------------------------|--|
| Application maintenance information | Updates + Fixes |
| Business process diagrams | Support, Documentation, Business Process Maps |
| Interactive Services Repository | Support, Documentation, Interactive Services Repository |
| Hardware and software requirements | Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements |
| Installation guides | Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes |
| Integration information | Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications |
| Minimum technical requirements (MTRs) | Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms |
| Documentation updates | Support, Documentation, Documentation Updates |
| PeopleBooks support policy | Support, Support Policy |
| Prerelease notes | Support, Documentation, Documentation Updates, Category, Release Notes |
| Product release roadmap | Support, Roadmaps + Schedules |
| Release notes | Support, Documentation, Documentation Updates, Category, Release Notes |
| Release value proposition | Support, Documentation, Documentation Updates, Category, Release Value Proposition |
| Statement of direction | Support, Documentation, Documentation Updates, Category, Statement of Direction |
| Troubleshooting information | Support, Troubleshooting |
| Upgrade documentation | Support, Documentation, Upgrade Documentation and Scripts |

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

| Typographical Convention or Visual Cue | Description |
|--|--|
| Bold | Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call. |
| <i>Italics</i> | Indicates field values, emphasis, and PeopleSoft Enterprise or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> . |
| KEY+KEY | Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key. |
| Monospace font | Indicates a PeopleCode program or other code example. |
| “ ” (quotation marks) | Indicate chapter titles in cross-references and words that are used differently from their intended meanings. |
| . . . (ellipses) | Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax. |
| { } (curly braces) | Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (). |

| Typographical Convention or Visual Cue | Description |
|--|---|
| [] (square brackets) | Indicate optional items in PeopleCode syntax. |
| & (ampersand) | <p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p> |

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft Enterprise system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other Oracle reference and training materials. Please send your suggestions to your product line documentation manager at Oracle Corporation, . Or email us at appsdoc@us.oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements Used in PeopleBooks

| | |
|------------------------------------|--|
| As of Date | The last date for which a report or process includes data. |
| Business Unit | An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization. |
| Description | Enter up to 30 characters of text. |
| Effective Date | The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row. |
| Once, Always, and Don't Run | Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. |

| | |
|--------------------------|---|
| | Select Always to run the request every time the batch process runs. |
| | Select Don't Run to ignore the request when the batch process runs. |
| Process Monitor | Click to access the Process List page, where you can view the status of submitted process requests. |
| Report Manager | Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list). |
| Request ID | An ID that represents a set of selection criteria for a report or process. |
| Run | Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format. |
| SetID | An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group. |
| Short Description | Enter up to 15 characters of text. |
| User ID | An ID that represents the person who generates a transaction. |

XML Publisher for PeopleSoft Enterprise Preface

This book discusses XML Publisher for PeopleSoft Enterprise.

XML Publisher for PeopleSoft Enterprise Preface

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.

CHAPTER 1

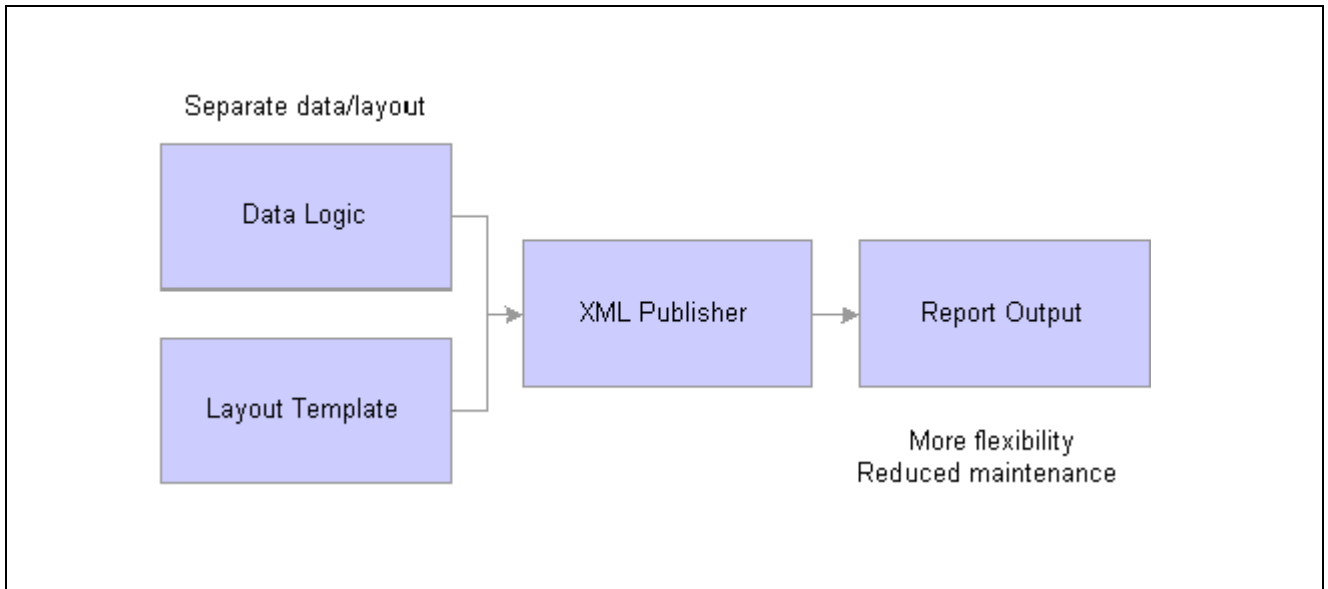
Getting Started with XML Publisher

This chapter provides an overview of XML Publisher and discusses XML Publisher implementation.

XML Publisher Overview

Oracle has developed a standalone Java-based reporting technology called XML Publisher (XMLP) that streamlines report and form generation. A primary feature of Oracle's XML Publisher product is the separation of the data extraction process from the report layout. XML Publisher provides the ability to design and create report layout templates with the more common desktop applications of Microsoft Word and Adobe Acrobat, and renders XML data based on those templates. With a single template, it can generate reports in many formats (PDF, RTF, Excel, HTML, and so on) in many languages. This approach to reporting can dramatically reduce report maintenance, enabling power business users to adjust report templates without involvement of IT resources.

The following diagram illustrates the concept of XML Publisher.



XML Publisher concept

Select features of Oracle's XML Publisher product have been integrated into and enhanced for use with PeopleTools. XML Publisher for PeopleSoft Enterprise makes Oracle XML Publisher technology natively accessible from PeopleSoft Query as well as any PeopleTools based applications providing XML data. XML Publisher for PeopleSoft Enterprise provides an environment for managing templates, data sources, reports, translations, and content components. It also offers an electronic bursting capability to produce reports according to a user-defined criteria and the reports can be secured using an application's security join table. A set of PeopleCode XML Publisher classes for runtime report generation is also provided.

There are two aspects of this integration:

1. Design time during which a report developer or power user registers a report definition and associates a data source with a template.
2. Runtime when the definitional information is called by the page viewer or processing program to produce the formatted output.

Note. As with other PeopleTools delivered features, XML Publisher for PeopleSoft Enterprise utilizes managed object functionality, and you do not have the ability to use the switching feature of multilanguage data entry. Related Language tables can be populated by logging in and establishing a different session language. The Related Language table for that session can then be populated.

XML Publisher Implementation

XML Publisher implementation can be divided into the following phases:

- Configure XML Publisher.
- Register data sources.
- Create templates.
- Define XML Publisher reports.
- Run XML Publisher reports.
- Locate and view published XML Publisher reports.

Configure XML Publisher

To prepare your system for using XML Publisher, perform the following steps:

| Step | Reference |
|---|---|
| 1. Define XML Publisher settings. | See Chapter 3, “Setting Up XML Publisher,” Defining XML Publisher Global Engine Settings, page 9. |
| 2. Set up XML Publisher permission list security. | See Chapter 2, “Understanding XML Publisher,” XML Publisher Business Processes, page 5. |
| 3. Set up Report Manager. | See <i>Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler</i> , “Using Report Manager”. |
| 4. Define report categories, including Report Definition Editor security. | See Chapter 3, “Setting Up XML Publisher,” Setting Up Report Categories, page 10. |
| 5. Download design plug-ins to facilitate the offline template design activities. | See Chapter 3, “Setting Up XML Publisher,” Working with Template Design Helpers, page 11. |

Register Data Sources

To register data sources, perform the following steps:

| Step | Reference |
|--|---|
| 1. Identify or create the source of your report data. Data sources can be PeopleSoft queries, rowsets, XML document objects, or XML files. For PeopleSoft queries, you can create or update the queries and query specifications. | See <i>Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Query</i> , “Creating and Running Simple Queries” and Appendix A, “Working with XML Publisher Technology,” Creating a Custom Report, page 43. |
| 2. Register schema and sample data files for XML Publisher data sources. | See Chapter 4, “Using XML Publisher,” <u>Registering Data Sources</u> , page 26. |

Create Templates

To create templates, perform the following steps:

| Step | Reference |
|---|--|
| 1. Download schema and sample data from the appropriate data source to facilitate template design. | See Chapter 4, “Using XML Publisher,” <u>Defining Reports</u> , page 14. |
| 2. Use well-known technologies and tools like Microsoft Word and Adobe Acrobat to develop and maintain custom report formats. | See Appendix B, “Creating Report Templates,” page 49 and Chapter 4, “Using XML Publisher,” Using the Content Library to Maintain Sub-templates, page 28. |
| 3. (Optional) Create and maintain reusable sub-template definitions. | See Chapter 4, “Using XML Publisher,” <u>Using the Content Library to Maintain Sub-templates</u> , page 28. |
| 4. (Optional) Register translation .XLF files for report templates and Content Library sub-templates. | See Chapter 4, “Using XML Publisher,” <u>Maintaining Template Translations</u> , page 31. |

Define XML Publisher Reports

To create and maintain report definitions, perform the following step:

| Step | Reference |
|---|--|
| 1. Define reports by associating data sources with layout template files. | See Chapter 4, “Using XML Publisher,” <u>Defining Reports</u> , page 14. |

Run XML Publisher Reports

To view and schedule XML Publisher reports, perform the following steps:

| Step | Reference |
|--|--|
| 1. Schedule Query-based XML Publisher reports. | See Chapter 4, “Using XML Publisher,” <u>Scheduling Reports in Query Report Scheduler</u> , page 37. |
| 2. Schedule other XML Publisher reports. | See Appendix A, “Working with XML Publisher Technology,” <u>Creating a Custom Report</u> , page 43. |

| Step | Reference |
|---|---|
| 3. View Query-based XML Publisher reports online real-time. | See Chapter 4, “Using XML Publisher,” Running Reports in Query Report Viewer, page 36. |
| 4. View other XML Publisher reports online real-time. | See Appendix A, “Working with XML Publisher Technology,” Creating a Custom Report, page 43. |

Locate and View Published XML Publisher Reports

To view previously run XML Publisher reports in the report repository, perform the following steps:

| Step | Reference |
|---|---|
| 1. Locate XML Publisher reports using enhanced search criteria. | See Chapter 4, “Using XML Publisher,” Searching the XML Publisher Report Repository, page 39 and <i>Enterprise PeopleTools 8.48 PeopleBook: PeopleCode API Reference</i> , “XML Publisher Classes,” Search Operator Values. |
| 2. View XML Publisher reports in the Report Manager. | See <i>Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler</i> , “Using Report Manager,” Viewing Reports. |

CHAPTER 2

Understanding XML Publisher

This chapter discusses:

- XML Publisher business processes.
- XML Publisher security.

XML Publisher Business Processes

XML Publisher menu access is permission list driven and depends on permission list and role assignment. PeopleTools delivers permission list security and roles for XML Publisher report developers and XML Publisher power users.

Permission list PTPT2600 is intended for report developers. Users assigned a role with this permission list have access to all XML Publisher components, including set up capability on the advanced feature Report Definition Bursting page.

Permission list PTPT2500 is intended for power users and provides access to Query data sources for ad hoc reporting through Query Report Viewer and Query Report Scheduler. This permission list also provides access to report definitions and to the Content Library, though access to the report definition bursting information is view only.

Users assigned to other permission lists and roles, such as permission list PTPT1000, may only have access to the XML Publisher Report Repository.

This table illustrates delivered permission list security for XML Publisher:

| | XMLP Report Developer (PTPT2600) | XMLP Power User (PTPT2500) | PeopleSoft User (PTPT1000) |
|-----------------------|---|---|-----------------------------------|
| Report Category | Yes | No | No |
| Design Helper | Yes | Yes | No |
| Data Source | Yes | No | No |
| Report Definition | Yes | Yes Note. Display Only access for bursting. | No |
| Content Library | Yes | Yes | No |
| Template Translations | Yes | No | No |

| | XMLP Report Developer (PTPT2600) | XMLP Power User (PTPT2500) | PeopleSoft User (PTPT1000) |
|------------------------|---|-----------------------------------|-----------------------------------|
| Query Report Viewer | Yes | Yes | No |
| Query Report Scheduler | Yes | Yes | No |
| Report Repository | Yes | Yes | Yes |

XML Publisher Security

XML Publisher security can be separated into three categories:

1. Defining reports.
2. Running reports.
3. Viewing reports.

When defining Query-based reports, Query security determines which queries you have access to and can select from to create your XML Publisher report definitions. Security for editing and viewing report definitions is controlled by the Report Category ID attribute, which is set on the Reporting Tools, XML Publisher, Setup, Report Category page.

Security for running and viewing XML Publisher reports is controlled by setting options in a number of places. This table illustrates where security can be set:

| Activity | Security Settings | Query-based reports (Non-Bursting) | Query-based reports (Bursting) | Non-Query-based reports (Non-Bursting) | Non-Query-based reports (Bursting) |
|----------------------------|----------------------------------|---|---------------------------------------|---|---|
| Running Reports | Query Security | X | X | N/A | N/A |
| Running Reports | Application Security | X | X | X | X |
| Running Reports | Process Scheduler Security | X | X | X | X |
| Viewing Report Definitions | Report Definition, Security page | X | X | X | X |
| Viewing Report Definitions | Report Definition, Bursting page | N/A | X | N/A | X |

Application security and Process Scheduler security determine who can run reports. XML Publisher does not provide additional security beyond what PeopleSoft currently provides. That means that the component security of the data extraction program drives access control to the associated reports. For processes, process security prevails and for queries, query security prevails. When running a Query-based report, the requester's row level security to the underlying data source always applies.

Query-based reports viewed online real-time from the Query Report Viewer respect query access groups for the user's primary permission list. For non-Query-based reports viewed online real-time, security is controlled by the application.

When viewing a report that was run through either the Query Report Scheduler or the Process Scheduler, security is controlled by both the Distribution ID field on the Report Definition, Security page and, when the Allow viewer ID assignment at report runtime is selected, by those IDs selected at runtime on the Process Scheduler Request, Distribution Detail page. Additional viewing security can also be defined for bursted reports on the Report Definition, Bursting page.

If no viewers are designated on the Report Definition, Security page, the report requestor's ID is applied as a viewer by default at runtime. This means that bursted reports also always have the requestor entered as a viewer unless there is a specifically designated viewer on the Security page.

See [Chapter 3, "Setting Up XML Publisher," Setting Up Report Categories, page 10](#); [Chapter 4, "Using XML Publisher," Creating Report Definitions, page 13](#); *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests," Scheduling Process Requests; *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*, "Setting Up PeopleSoft Process Scheduler Security" and *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Query*, "PeopleSoft Query Security".

CHAPTER 3

Setting Up XML Publisher

This chapter discusses how to prepare to use XML Publisher.

Preparing to Use XML Publisher

This section discusses how to:

- Define XML Publisher Global Engine settings.
- Set up report categories.
- Work with the template design helpers.

Pages Used to Set Up XML Publisher

| Page Name | Object Name | Navigation | Usage |
|-----------------|-----------------|--|--|
| Report Category | PSXPSETUPRPTCAT | Reporting Tools, XML Publisher, Setup, Report Category | Define report categories. |
| Design Helper | PSXPSETUPDNLD | Reporting Tools, XML Publisher, Setup, Design Helper | Download plug-ins to facilitate offline template design. |

Defining XML Publisher Global Engine Settings

XML Publisher Global Engine settings are defined in the xdo.cfg file. The default xdo.cfg file is located in the \$PSHOME/appserver directory, which is shared by all application server and process scheduler domains by default.

The default xdo.cfg file contains the following settings:

```
<config version="1.0.0" xmlns="http://xmlns.oracle.com/oxp/config/">
  <properties>
    <!-- System level properties -->
    <property name="xslt-xdoparser">true</property>
    <property name="xslt-scalable">true</property>
    <property name="system-temp-dir">CACHE</property>
    <property name="system-cachepage-size">50</property>

    <!-- PDF compression -->
    <property name="pdf-compression">true</property>
  </properties>
</config>
```

```

    <!-- PDF Security -->
    <!-- <property name="pdf-security">true</property> -->
    <!-- <property name="pdf-open-password">user</property> -->
    <!-- <property name="pdf-permissions-password">owner</property> -->
  </properties>
</config>

```

The `system-temp-dir` setting of CACHE is relative to the application server or process scheduler domain directory. For example, for application server domain P8488041 located at `[PS_HOME]/appserv/P8488041`, the `system-temp-dir` setting for the domain would be `[PS_HOME]/appserv/P8488041/CACHE`.

You can also specify an application server or process scheduler domain-specific `xdo.cfg` file. To do this, you need to change the application server or process scheduler configuration file to update the `JavaVM Options -Dxdo.ConfigFile` setting. For example, to specify a separate `xdo.cfg` file for application server domain P8488041, change the `[PS_HOME]/appserv/P8488041/psappsrv.cfg` file as indicated below and put the new `xdo.cfg` into the `[PS_HOME]/appserv/P8488041` directory.

Original line in `psappsrv.cfg`:

```
JavaVM Options=-Xrs -Dxdo.ConfigFile=../xdo.cfg
```

New line in `psappsrv.cfg`:

```
JavaVM Options=-Xrs -Dxdo.ConfigFile=xdo.cfg
```

Note. The `-Dxdo.ConfigFile` setting is relative to the application server or process scheduler domain directory, which is the current directory when the domain starts up.

If you change the content of `xdo.cfg`, you don't need to restart the application server or the process scheduler domain that uses it. It refreshes automatically the next time you run it. But if you change the application server or process scheduler configuration file, you need to restart the affected domain.

Additional properties can be set to further customize XML Publisher, however, the configuration file cannot control all of the existing properties. For example, some PDF security properties including `pdf-security`, `pdf-encryption-level`, and `pdf-no-changing-the-document` are controlled by XML Publisher at runtime.

See *Oracle XML Publisher Core Components Guide, Setting Runtime Properties*.

Setting Up Report Categories

Report Category is a required attribute on all report definitions and Content Library sub-templates. By assigning a report category, you are actually applying row level security to the data on those components.

Access the Report Category page.

Report Category

Report Category ID: ALLUSER

Properties

Description:

***Object Owner ID:**

Report Definition Editors and Viewers View All First 1 of 1 Last

| *ID Type | *Security ID | Description | Read Only |
|-----------------------------------|--|-----------------|--------------------------|
| <input type="text" value="Role"/> | <input type="text" value="PeopleSoft User"/> | PeopleSoft User | <input type="checkbox"/> |

Report Category page

| | |
|---------------------------|---|
| Report Category ID | Enter a report category ID to define a grouping that enables users to control who can access and edit report definitions and Content Library sub-templates. |
| Description | (Optional) Enter descriptive text that provides more detail about the report category. |
| Object Owner ID | Indicate which product, feature, or application owns this report category. |
| ID Type | Select an ID type of either <i>Role</i> or <i>User ID</i> to grant authorization to. |
| Security ID | Select the authorized editor's security ID based on the ID type. |
| Description | A read only field that indicates the related display value for the security ID. |
| Read Only | (Optional) Select this check box to indicate that the designated ID be able to view the report definitions only under this category and not update them. |

Note. The PeopleCode XML Publisher classes also respect report category settings and read-only access rights.

Working with Template Design Helpers

During template creation, a design helper facilitates the insertion of application data tag placeholders into your templates. A schema or sample data file is required for using a design helper. If you use a sample data file, you can preview your template offline during the design process.

Access the Design Helper page.

Design Helper

Template Designer Client Tools

[Plug-in for Microsoft Word \(requires 2000 or later\)](#)
Facilitates the insertion of application data tags into RTF templates.

Design Helper page

This page enables users to download a plug-in for Microsoft Word to facilitate offline RTF template design. Select the link to download the tool.

Note. Not all template types have plug-ins for offline template design.

A PDF visual mapping feature is enabled when the PDF template file is uploaded into the Report Definition, Template page.

See [Appendix B, “Creating Report Templates,” PDF Templates, page 52](#).

CHAPTER 4

Using XML Publisher

This chapter discusses how to:

- Create report definitions.
- Register data sources.
- Use the Content Library to maintain sub-templates.
- Maintain template translations.
- Run XML Publisher-enabled reports.

Creating Report Definitions

This section provides an overview of report definitions and discusses how to:

- Define reports.
- Associate templates.
- Set output options.
- Set security options.
- Set bursting options.

Understanding Report Definitions

Report definitions associate a data source with template files. A data source registers the schema and sample data design files. It is the extracted application fields from the data source files that are placed into the template files to create the final report.

A report may include multiple templates. A template is used to associate different layout formats as required by different countries/regions or as required by different channels (web posting, printer, fax, and so on).

The defined output options from the report definition are reflected on the output type and format prompts on the Process Scheduler request page when the application process that runs the report is assigned the process type of XML Publisher. Report definition security settings determine who can view the report once it has been run.

With the advanced bursting feature, report generation results in separate output files when bursted reports are run through Process Scheduler.

Report definition access is based on user permission list security and roles. For example, bursting is read-only for XML Publisher power users, because only developers can set up bursting, and the page only appears when there are existing settings.

XML Publisher power users can start to define a report in order to download the sample data and schema design files to create their templates.

Pages Used to Create Report Definitions

| Page Name | Object Name | Navigation | Usage |
|------------|--------------|--|-----------------------|
| Definition | PSXPRPTDEFN | Reporting Tools, XML Publisher, Report Definition, Definition. | Define reports. |
| Template | PSXPRPTTMPL | Reporting Tools, XML Publisher, Report Definition, Template. | Associate templates. |
| Output | PSXPRPTOUT | Reporting Tools, XML Publisher, Report Definition, Output. | Set output options. |
| Security | PSXPRPTSEC | Reporting Tools, XML Publisher, Report Definition, Security. | Set security options. |
| Bursting | PSXPRPTBURST | Reporting Tools, XML Publisher, Report Definition, Bursting. | Set bursting options. |

Defining Reports

Access the Definition page.

| Definition | | Template | Output | Security | Bursting |
|---------------------------------|--|----------|-----------------------------|----------|----------|
| Report Name: | XRFWIN | | | | |
| Data Source | | | | | |
| Data Source Type: | PS Query | | | | |
| Data Source ID: | XRFWIN | | | | |
| Data Source Description: | XRFWIN | | | | |
| Report Properties | | | | | |
| Report Description: | <input type="text" value="Cross Reference Window Listing"/> | | | | |
| *Report Status: | <input type="text" value="Active"/> | | | | |
| *Report Category ID: | <input type="text" value="ALLUSER"/> <input type="button" value="All PeopleSoft User"/> | | | | |
| Object Owner ID: | <input type="text" value="PeopleTools"/> | | | | |
| Template Type: | <input type="radio"/> PDF <input checked="" type="radio"/> RTF <input type="radio"/> eText <input type="radio"/> XSL | | | | |
| Days Before Purge: | <input type="text"/> | | | | |
| Registered Date/Time: | 01/06/2006 2:33:09PM | | Registered By: | PTDMO | |
| Updated Date/Time: | 02/28/2006 4:26:18PM | | Updated By: | PPLSOFT | |
| Download: | Data Schema | | Sample Data | | |

Definition page (RTF template)

Report Name

Enter a report name.

The report name should be a unique ID, and it must not contain any special characters. If spaces are entered in the report name, they are replaced by underscores.

Data Source Type

Select *PSQuery*, *Rowset*, *XML Doc*, or *XML File*.

Note. For XML Publisher power users, the data source type is *PSQuery* only and the drop-down list box is disabled.

See [Chapter 4, “Using XML Publisher,” Registering Data Sources, page 26](#).

Data Source ID

Select the data source ID.

You can choose from data source IDs that are based on previously registered data sources. Queries can be selected whether or not they have been previously registered as data sources. For queries, the lookup table respects the public, private, and query access group security for the current user ID.

Upon saving a report definition with an unregistered query data source, the query is systematically registered as a data source. The query has no object owner ID, but that value can be updated manually on the Data Source page, if required.

| | |
|--------------------------------|---|
| Data Source Description | <p>This is a read-only field that reflects the value that was entered when the data source was registered.</p> <p>For unregistered query data sources, this field reflects the query description.</p> |
| Report Description | <p>(Optional) Enter descriptive text that provides more detail about the report.</p> <p>If left blank, the report name appears by default.</p> |
| Report Status | <p>Select <i>Active</i>, <i>In Progress</i>, or <i>Inactive</i>.</p> <p>Setting the report status allows work in progress as well as retirement of report definitions. Active reports must have at least one active template. Only active reports can be selected at runtime and run to success.</p> |
| Report Category ID | <p>Select a report category ID.</p> <p>This is a grouping mechanism for reports that provides row level security for editing report definitions per the rights defined on the report category setup table.</p> <p>See Chapter 3, “Setting Up XML Publisher,” Setting Up Report Categories, page 10.</p> |
| Object Owner ID | <p>(Optional) Indicate which product, feature, or application owns this report.</p> <hr/> <p>Note. The default value that appears here is based on the Object Owner ID set in the Report Category component.</p> <hr/> |
| Template Type | <p>Select <i>PDF</i>, <i>RTF</i>, <i>eText</i>, or <i>XSL</i>.</p> <p>Only one template type is allowed per report. The type cannot be altered once the first template file has been uploaded and saved.</p> <p>The template file extension that can be uploaded on the Template page are controlled by this choice. This value also controls which report templates appear on the Translation component, as only RTF templates are translatable.</p> |
| Days Before Purge | <p>(Optional) Enter a value to set the option to purge the reports from the Report Repository and archive the data to the Report Archive table.</p> <p>The value entered here overrides the system setting for retaining reports. The maximum value that can be entered is 999 days. If no value is selected, the value from the PeopleTools, Process Scheduler, System Settings, System Purge Options page applies.</p> <p>Only XML Publisher report developers with permission list PTPT2600 can set this value.</p> <p>See <i>Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler</i>, “Using Report Manager,” Maintaining Reports.</p> |
| Registered Date/Time | <p>This is a read-only field maintained by the system that indicates the date that the initial report definition was registered.</p> |
| Updated Date/Time | <p>This is a read-only field maintained by the system that indicates the date that the last update to the report definition was made.</p> |
| Registered By | <p>This is a read-only field maintained by the system that indicates the user ID of the operator who initially registered the report definition.</p> |

Updated By This is a read-only field maintained by the system that indicates the user ID of the operator who last updated the report definition.

Download Click Data Schema to detach the schema file or Sample Data to detach the data file.

Detaching the files enables the user the ability to view the data elements prior to finalizing the report definition.

These links appear if the related files exist on the registered data source. For query data sources, both links always appear whether the data source is registered or not, because these files are system generated.

See [Chapter 4, “Using XML Publisher,” Registering Data Sources, page 26.](#)

Associating Templates

Access the Template page.

The screenshot shows the 'Template' page for report 'T4NBR3'. It features a navigation bar with tabs for 'Definition', 'Template', 'Output', 'Security', and 'Bursting'. The 'Template' tab is selected. Below the navigation bar, the 'Report Name' is 'T4NBR3'. The main content area is divided into two sections: 'Template' and 'Template Files'. The 'Template' section includes fields for 'Template ID' (T4NBR3_1), 'Description' (empty), '*Language Code' (English), and 'Channel' (empty). A 'Default Template' checkbox is checked. The 'Template Files' section includes 'Effective Date' (01/02/2006), '*Status' (Active), 'Template File' (i-9.pdf), and 'Map File' (i-9m[1].pdf). There are buttons for 'Upload', 'Download', 'Preview', 'Generate', and 'Upload/Download' for the files.

Template page (PDF template)

The Template group box of the Template page refers to a particular template layout, because one report definition can associate multiple template layouts differentiated by Language Code or Channel.

Template ID Enter a unique template ID for this template.

The default template ID is a system-generated ID based on the report name. This ID can be edited when a template is first added to the report definition, but it must be unique across all templates in the system, not just within the current report definition.

Description (Optional) Enter descriptive text that provides more detail about the template and identifies its use.

Entering a meaningful description helps the user select the proper template at runtime. For example, indicate a unique layout or channel.

| | |
|-------------------------|---|
| Language Code | Select a language code for the template. The default value reflects the default template language. |
| Default Template | Indicate whether this is the default template. Only one template can be selected as the default template. The first template added to the report definition is automatically selected as the default. This selection can be changed as necessary. Default templates are automatically used at runtime if no other value is supplied. |
| Channel | (Optional) Select the distribution channel for the template. The Channel attribute supports the need to identify different layout formats as required by the various distribution mechanisms. For example, a printout may require a different template layout than an email or a web posting. Leaving the channel blank would indicate that this particular template does not have a format that is specifically suited to just one channel These values are for information only and do not trigger a particular Process Scheduler distribution mechanism. Developers can drive a template choice based on channel through the PeopleCode XML Publisher classes. |

Adding Template Files

Within each template layout defined above is one or more effective-dated versions of the template. For example, you may have a new government form for each year. In the Template Files group box, you attach effective-dated files that are the actual report templates.

| | |
|-----------------------|--|
| Effective Date | Select an effective date for the template file in order to maintain new versions or versions specific to a particular time period. For example, a new file could be uploaded to reflect a new format, effective for reports as of the new date. The default date for a newly added template file is the current system date. The user can change the data per standard effective dating logic with Update, Update/Display, and Correction modes. See <i>Enterprise PeopleTools 8.48 PeopleBook: Using PeopleSoft Applications</i> , “Working With Pages,” Using Effective Dates. |
| Status | Select a status of <i>In Progress</i> , <i>Active</i> , or <i>Inactive</i> for the template file. This field indicates the usability of the template file. Runtime template file selection logic uses this field in conjunction with the Effective Date field to determine which template file should be used at runtime. At least one file must be active to save a report definition. |
| Template File | A read-only field indicating the name of the template file. |
| Upload | Click this button to attach a template file to the template. The file extension is checked against the template type value on the Definition page and a warning is issued if there isn’t a match. Once the report definition is saved, this button becomes disabled. To reupload a new version of the template, you must delete and re-add it. |
| Download | Click this button to download the template file to your local computer for updating the field or tag assignments. |

Preview Click this button to preview the report using the current template file based upon the sample data file that was registered with the data source.

The preview button is not enabled when there is no sample data file registered with the data source.

See [Appendix B, “Creating Report Templates,” Mapping Data Tags, page 54.](#)

Mapping PDF Template Files

For PDF files, a mapping is sometimes required between the field elements from the data source and the form field elements on the PDF template in order for the XML data element tags to know where they should print within the PDF template. This is often true for third party PDF templates, where the form fields already exist inside the form template. However, if you create PDF and name tags that are the same to begin with in your PDF file, no mapping is necessary.

When working with PDF map files, some indication of mapping should be included in the name to distinguish it from the unmapped template file. For example, the template file XRFWIN.pdf would have a map file XRFWINm.pdf.

The following fields appear on the Template page for PDF templates files:

| | |
|---|--|
| Map File | A read-only field indicating the name of the mapped PDF file. This field populates once the mapped PDF file has been uploaded. |
| Generate | Click this button to generate the PDF map file. Schema and sample data are placed into the PDF template file uploaded above to enable you to access the data tags for performing visual mapping offline within the Adobe application. |
| <hr/> | |
| Note. PDF file security has to allow altering and saving for the mapping to be completed. This depends on the version of Adobe with which you are working. | |
| Upload | Click this button to upload the PDF map file once the tags have been mapped. |
| Download | Click this button to download the PDF map file to your local computer for updating the field or tag assignments. |

See [Appendix B, “Creating Report Templates,” Mapping Data Tags, page 54.](#)

Setting Output Options

Access the Output page.

Report Name: XRFWIN

General

PDF report output may be edited

Runtime Output Format Options

| 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"/> |

Output Location

*Location: Any

Output page (RTF template)

PDF report output may be edited

Select this check box to indicate whether the internal Adobe flag of a PDF report output file has the setting turned on to allow editing.

Format Type

A read-only field that dynamically lists the available output formats based on the template type.

Enabled

Select specific values here to limit the output choices for the user at runtime.

Default

Select a default format type.

This value is displayed at runtime on the prompt or run control page. It is also the output format that the system uses if no other value is fed into the XML Publisher engine.

Location

Select one of the following locations:

- *Any* indicates that the user can select the output location at runtime.
- *File* indicates that the output goes to a file server in a Process Scheduler server directory location.

Enter the file path for the output in the Destination field. This field is available only when the output location that you select is *File*.

- *Printer* indicates that the output goes directly to a printer.

Specify the printer destination for the output in the Printer field. This field is available only when the output location that you select is *Printer*.

Printer is a valid selection only when PDF output format is enabled.

- *Web* indicates that the output goes to a web report repository accessible by the Report Manager.

Select the folder for the output from the Report Manager Folder Name lookup. This field is available only when the output location that you select is *Web*.

This is the default location used at runtime if no location is selected.

Note. The XML Publisher report definition output options are reflected in the output type and output format prompts on the Process Scheduler Request page only when the application process that runs the report is assigned the process type of XML Publisher.

Output Format Options

Based on the template type, the output options are as follows:

| Template Type | Output Options |
|---------------|--------------------------------|
| RTF | .pdf, .html, .rtf, .xls (html) |
| PDF | .pdf |
| E-Text | .txt |
| XSL | .pdf, .html, .rtf, .xls (html) |

Printing XML Publisher Report Output

PeopleSoft supports batch printing XML Publisher reports directly from a server using PDF output format. When *Printer* is selected as the output location, PDF is the only output format displayed in the Process Scheduler Process Request Dialog page. When PDF format is not supported for a report definition, printing is not supported for that report. If you are not printing directly upon posting the report, you must open and print the report from Adobe Acrobat. All bursted output reports are sent to a single printer, but as multiple print jobs.

It is also possible to convert the generated PDF files to other conventional printer output formats with an external software program. PeopleSoft provides PeopleCode support for inserting conversion logic from PDF to different printer formats.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleCode API Reference*, “XML Publisher Classes”; *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests,” Scheduling Process Requests and [Appendix A, “Working with XML Publisher Technology.”](#) [Customizing Printed Report Output](#), page 46.

Setting Security Options

The Security page captures attributes regarding who can view web-posted output in the Report Manager repository and through the XML Publisher Report Repository Search page.

Access the Security page.

Report Name: XRFWIN

Report Viewers

Allow viewer ID assignment at report runtime

| ID Type | Distribution ID | Description |
|---------|----------------------|--------------------------|
| User | PSADMIN | PeopleSoft Administrator |
| User | PTDMO | PTDMO |
| Role | Portal Administrator | Portal Administrator |

Security page (RTF template)

Allow viewer ID assignment at report runtime

Select this check box to indicate whether the report requestor can add to the standard Distribute To values on the Process Scheduler Request, Distribution Detail page.

ID Type

Select an ID type of either *Role* or *User ID*.

Distribution ID

Select a corresponding distribution ID based on the ID type.

Description

A read-only field that displays the related description of the distribution ID.

Setting Bursting Options

Bursting is an optional advanced feature that is only available when reports are run through Process Scheduler and is not intended for real-time online viewing. It is typically used when you are repeating the generation of a templated report layout many times for multiple like sets of data. For example, generating a batch run on vendor purchase orders or customer invoices. With bursting, you can generate individual report files resulting in separate secured output. For example, generating a file for each vendor, customer or employee.

Setting up bursting requires thorough knowledge and understanding of data values and schema structures. It is possible to make entries on the Bursting page that would cause the report to fail at runtime. When you generate a bursted report, separate document files are created for each unique data value for a specified field tag. This 'burst by field' tag must be from the highest level repeating group (node) in the XML schema.

Bursting can only be defined when the report's data source has an associated schema file. Numerous bursting instructions depend upon the data coming from the application as defined by the schema tags.

As bursting is an advanced feature, PeopleTools delivers permission list security that is intended for XML Publisher report developers (PTPT2600). When users are assigned a role with this permission list, they have access to setup entries on the Bursting page. There is also a view only permission list (PTPT2500) option for XML Publisher power users that provides view-only access to the bursting information. The bursting page appears for the power user only when there are existing bursting instructions for the report.

Note. In order for a schema field to take advantage of the bursting features, it must be registered with the data source of the report definition.

Access the Bursting page.

Definition Template Output Security **Bursting**

Report Name: QE_BURST_PUB

Bursting

Burst by: CUST_ID

Template

Template controlled by: SETID

Template Application Criteria

| *Data Value | *Template ID | Language | | |
|-------------|----------------|----------|---|---|
| CRM01 | QE_BURST_PUB_1 | | + | - |
| CRM02 | QE_BURST_PUB_2 | Japanese | + | - |
| CRM03 | QE_BURST_PUB_3 | French | + | - |

Bursting page (1 of 2)

Burst Security

Security Join Table: SEC_SETID_CLS

Security Field: OPRCLASS **Security ID Type:** Permission List

Field Mapping

| Security Join Table Field | Data Source Field | | |
|---------------------------|-------------------|---|---|
| SETID | SETID | + | - |

Search Keys

Search Field

| | | |
|---------|---|---|
| COUNTRY | + | - |
| NAME1 | + | - |
| SETID | + | - |

Bursting page (2 of 2)

Burst by

Select a Burst by field to enable report bursting.

All subsequent bursting features are disabled until this value is selected. The values in the drop-down list box are the children from the highest repeating level (group node) in the XML schema associated with the data source assigned to the report definition.

Once selected, the report generates multiple files at runtime with a separate report instance file generated each time a unique value appears for the Burst by data tag. For example, this could be one report file for each employee when bursting by EmplID or one report for each department (that includes multiple occurrences of the report, one for each employee) when bursting by DeptID.

Template Assignment for Bursting (Optional)

This feature dynamically drives the template assignment at runtime based upon the data value of a designated schema tag. You can assign a language code to apply a specific template translation as well. This means that the various bursted report occurrences in one batch run can each have an appropriately assigned template and translation. For example, you can print Canadian paychecks in English or French depending upon the employee's preference.

A template ID should be selected for each data value that requires a special template.

At runtime, the process looks for the specified template and language. If the language does not exist, then the base untranslated template is applied. If a data value is encountered that is not assigned on the report definition, then the template ID entered on the run control is assigned. If no Template ID selection is captured at runtime, then the default template of the report definition is applied.

| | |
|-------------------------------|--|
| Template controlled by | Select the schema tag value from first child level to indicate the field with the template translation preference. |
| Data Value | Enter a row for each data value that requires a specific template or template translation. |
| Template ID | Select the template ID to be applied when the data value specified above is found in the XML data. These drop-down list box values are dynamically determined by those already defined on the report. |
| Language | (Optional) Select a language code for the desired translation of the template when the specified data value is found in the XML data. The language choices in the drop-down list box reflect the complete list of available languages and are not limited by the existing registered Translation XLIFF files. See Chapter 4, "Using XML Publisher," Maintaining Template Translations, page 31 . |

Security for Bursting (Optional)

When a report is set up to be bursted, the report designer can also designate how the generated documents are secured when they are posted to the Report Manager. At runtime, this information is used to determine who can view each bursted report instance. Bursting security can be utilized to supplement or replace the basic report viewer security by role or user ID. Otherwise, the system limits access to each report instance based on preexisting system security definitions.

The system automatically limits access to each report instance based on the Burst by field. For example, if the report is burst by employee ID, only the users designated with access to each employee ID are able to view the output file.

The report designer must provide the record name of the security join table and designate the common fields to join with the bursting field. The system performs the join and determine who can view the report instances. This matching allows the Report Manager's posting process to dynamically identify the user IDs or roles that are assigned viewing rights for each report instance.

At least one type of security should be completed either on the Security page or on the Bursting page. Set security in both places to secure bursted files differently from securing the report definition. If security on the Bursting page is blank, then the security set on the Report Definition Security page applies. If the Security page is also blank, then the report requestor gets put in as the viewer by default and all the bursted report files are accessible only by the report requestor. Security can be assigned from all three places, if desired.

| | |
|----------------------------------|--|
| Security Join Table | Select the record name for the table that stores either a user ID or a permission list assigned to a data value found in the XML data. This prompt list is filtered for records that include security data. |
| Security Field | Select the field from the Security Join Table that stores the user ID or permission list to secure on. |
| Security ID Type | Select either <i>User ID</i> or <i>Permission List</i> to indicate what type value is in the Security Field. |
| Security Join Table Field | Select the field from the Security Join Table that joins with the schema data tag to identify the proper row from which to find the Security Field's value that's used to secure the bursted file. |
| Data Source Field | Select the schema tag that stores the values that determines the security assignment. This may require more than one tag, as they must be first child level tags. For example, they could be employee, customer, department ID, or set ID/vendor ID combination, and so on. |

Search Keys (Optional)

When report results are burst into separate files, it is important to be able to locate the desired individual report from the Report Manager repository. Delivered search keys include Burst By, Report Definition Name, and Generated On Date. Additional search keys may be defined to provide even more specific granularity.

At report runtime, the report posting program uses this information to store the key names defined here along with the specific data values for each burst report. From the XML Publisher Report Search page, users can utilize these configurable search fields to locate a specific report occurrence. For example, if the pay advice report runs regularly and posts numerous report files for self-service access and as an employee you want to locate a particular dated advise, you would not want to browse through all the advise files to locate the one you really want to see. By adding a data value in the data source for 'pay period' and assigning that field as a bursting search key, the employee is then able to enter a date when searching their pay advises.

| | |
|---------------------|--|
| Search Field | Select an additional field to search on from within the XML Publisher Report Search page. The drop-down list box values are taken from the children from the highest repeating level (group node) in the XML schema. Make sure these values are unique per burst value At design time, you can select as many search fields as are required. However, at search time, the XML Publisher Report search page allows only two search criteria in addition to the Burst by value. An API is provided to facilitate finding bursted XML Publisher reports in the Report Manager repository. When reports are burst into multiple separate files and posted in the Report Manager, the configurable search keys with their values are available as search keys in addition to Report Name, Burst By, Date, and Process Instance ID. |
|---------------------|--|

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleCode API Reference*, “XML Publisher Classes,” SearchAttribute Class.

Registering Data Sources

This section provides an overview of data source registration and discusses how to register data sources.

Understanding Data Source Registration

A data source registers the schema and sample data design files. It is the extracted application fields from the data source files that are placed into the template files to create the final report.

Data sources may be PeopleSoft Queries, rowsets, XML document objects, or XML files.

Benefits of data source registration include:

1. Previously registered data sources can be reused with multiple report definitions.
2. Desktop template builder plug-in features can be used by anyone using the registered data sources.
These plug-in features facilitate the placement and mapping of data elements into a report template file.
3. The ability to take advantage of built-in bursting features.

A schema file must be registered with the report definition’s data source in order to take advantage of bursting functionality.

See [Chapter 4, “Using XML Publisher,” Setting Bursting Options, page 22](#).

Note. When creating a report definition, you can select a PeopleSoft Query data source that has not yet been registered and that data source is registered automatically once the report definition is saved. However, all other types of data sources must be registered before they can be associated with a report definition.

Note. You can check the format of an XML output file by opening it using Microsoft Internet Explorer (IE). IE opens the file and alerts you to any problems, such as unclosed tags.

Page Used to Register Data Sources

| Page Name | Object Name | Navigation | Usage |
|-------------|-------------|---|---|
| Data Source | PSXPDATASRC | Reporting Tools, XML Publisher, Data Source | Register existing processes that supply XML data for reports. Register optional schema and sample data files for XML Publisher data sources. |

Registering Data Sources

Access the Data Source page.

Data Source

Data Source Type: PS Query

Data Source ID: XRFWIN

Data Source Properties

Description: **Active**

Object Owner ID:

Registered Date/Time: 01/19/06 10:44:05PM **Registered By:** PTDMO

Last Update Date/Time: 01/26/06 10:59:43AM **Updated By:** PTDMO

Related Files

| File Type | File | Generate File |
|------------------|----------------------------|----------------------------|
| Sample Data File | XRFWIN.XML | Regenerate |
| Schema File | XRFWIN.XSD | Regenerate |

Data Source page

| | |
|------------------------------|--|
| Data Source Type | Select <i>PSQuery</i> , <i>Rowset</i> , <i>XML Doc</i> , or <i>XML File</i> . |
| Data Source ID | Select or enter the data source ID. When adding a new data source, for PSQuery data source types, the corresponding data source ID listing is pulled from Query Manager. For other data source types, this field accepts free-form text entry. Enter an ID that indicates what the data is, because you want to easily identify your data sources when defining reports. |
| Description | (Optional) Enter descriptive text that provides more detail about the data source. The description automatically defaults to the data source ID. |
| Object Owner ID | (Optional) Indicate which product, feature, or application owns this data source. This field is used to extract and package production data source and report registrations and their supporting files. |
| Registered Date/Time | This is a read-only field maintained by the system that indicates the date that the initial data source registration was made. |
| Last Update Date/Time | This is a read-only field maintained by the system that indicates the date that the last update to the data source was made. |
| Active | Select to indicate that this is an active data source. Only active data sources can be chosen when creating a new report definition. Only reports with active data sources can be processed. |
| Registered By | This is a read-only field maintained by the system that indicates the user ID of the operator who initially registered the data source. |

Updated By This is a read-only field maintained by the system that indicates the user ID of the operator who last updated the data source.

Related Files

These optional files facilitate the assignment of application data elements into the template file.

The sample data file is an XML file with sample data that is used for the preview action from within a desktop template designer or from within the report definition page. This file can be system-generated when PeopleSoft Query is the data source by clicking the Generate link; however, it must be constructed by the application developer and uploaded for non-query data sources.

The schema file is an XSD file that defines the structure and elements that is in the extracted XML data. The schema is required to map elements to a PDF form template and to insert form field tags into RTF templates using Microsoft Word. It is also required for bursting functionality. This file can also be system-generated when PeopleSoft Query is the data source by clicking the Generate link; non-query data sources must upload the file.

This table lists the role of each related file with regard to each of the template types:

| Related File | RTF Template | PDF Template | eText Template | XSL Template |
|------------------|-----------------------------------|--------------|----------------|--------------|
| Schema File | Form Field Tag Insertion | Mapping | N/A | N/A |
| Sample Data File | Form Field Tag Insertion, Preview | Preview | Preview | Preview |

File (Optional) Click the file name links to view the XML and XSD files once you have generated, regenerated, or uploaded them.

Last Update Date/Time (Optional) This is a read-only field maintained by the system that indicates the date that the last update to the related file was made.

Generate/Regenerate (Optional) Click the Generate link for PeopleSoft Query data sources to generate the related sample data and schema files.

Once the related files have been initially generated for query data sources, click the Regenerate link to regenerate them in the event the underlying query has changed.

Upload (Optional) Click the Upload link for non-query data sources to bring the related sample data and schema files into the database.

Note. A validation is run against the schema XSD file uploaded to a data source, alerting the developer if there are problems utilizing their schema.

Using the Content Library to Maintain Sub-templates

This section provides an overview of sub-templates and discusses how to maintain sub-templates.

Understanding Sub-templates

You may have text, images, or logic in your templates that you want to reuse across many report templates. Examples include company headquarter address information or standard legal language. Rather than replicate this text and/or code in every template, you have the ability to store sub-template files that include the reusable content. These sub-template files are referenced with standard XSL commands in the primary template file. Sub-template functionality is available for use only with primary RTF and XSL templates.

Sub-templates are secondary RTF or XSL templates that are imported by primary RTF or XSL report templates. The primary template accesses the sub-template through the XSL import style sheet feature. Any XSL style sheets or other RTF or XSL templates can be imported by following standard XSL import and call functions. PeopleTools simplified sub-template syntax is also supported.

Primary templates calling nonexistent or inactive sub-templates present an error indicating the reason for the problem. This error information is incorporated into Process Scheduler error handling as well as into online viewing or previewing of the report.

The sub-template files are independently stored and are not registered in association with a data source or primary template. This being the case, if any form fields exist inside the sub-template, the report in which the sub-template is placed must have a related data source that supplies those fields or the data must be passed in as runtime parameters.

The Content Library is a component provided for the registration of reusable sub-template files. The metadata is similar to that of primary template files and includes sub-template ID/Name, sub-template description, language, object owner ID, report category, effective date, and status. As with Report Definition security, sub-template editor registration security is applied through Report Categories. Because Report Category secures the data in the component, select users can be assigned Read Only access for a Report Category. These users are able to browse, view, and download sub-template files but not add them. This facilitates the offline design of primary templates for users who can access the library of existing sub-templates but who can't alter them.

Sub-template names are not exposed to the end user at either report design time or runtime. The complete template (primary and sub-templates) is systematically assembled by the XML Publisher engine during report generation. The same occurs during online previewing as long as the sub-template file exists.

Previewing reports online is the only way to see the complete report output, since the offline Microsoft Word preview functionality doesn't incorporate sub-templates. As such, sub-templates might be best used to incorporate complex processing and not to construct a template from multiple content-based sub-templates. The latter approach makes it much harder for you to see what you're doing when iteratively designing and testing a report, since you can't see your entire template's content design as one unit.

There is no method for viewing which report templates include which sub-templates. This means that users must be careful about changing, deleting, or inactivating sub-templates.

See [Chapter 4, "Using XML Publisher," Using the Content Library to Maintain Sub-templates, page 28](#).

Page Used to Maintain Sub-templates

| Page Name | Object Name | Navigation | Usage |
|-----------------|-----------------|---|-------------------------|
| Content Library | PSXPSUBTMPLDEFN | Reporting Tools, XML Publisher, Content Library | Maintain sub-templates. |

Maintaining Sub-templates

Access the Content Library page.

Content Library

Sub-Template ID: HEADERSTANDARD

Sub-Template Properties

Description:

***Language:**

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

Object Owner ID:

Sub-Template Type: RTF

Sub-Template File Find | View All First ◀ 1 of 1 ▶ Last

Effective Date: 01/05/2006

***Status:**

Template File: Header_Std_Lower_simple.rtf

Content Library page

| | |
|---------------------------|--|
| Sub-Template ID | Enter a unique sub-template ID. |
| Description | (Optional) Enter descriptive text that provides more detail about the sub-template and identifies its use. |
| Language | Select a language code for the sub-template. The default value reflects the user's base language. |
| Report Category ID | Select a report category ID. This is a grouping mechanism that provides row level security for editing sub-templates per the rights defined on the report category setup table. See Chapter 3, "Setting Up XML Publisher," Setting Up Report Categories, page 10. |
| Object Owner ID | (Optional) Indicate which product, feature, or application owns this sub-template. This field is used to extract and package production data source and report registrations and their supporting files. |
| Sub-Template Type | Select <i>RTF</i> or <i>XSL</i> . |
| Effective Date | Select an effective date for the sub-template file in order to maintain new versions or versions specific to a particular time period. For example, a new file could be uploaded to reflect a new format or new legal language for reports, and the new sub-template is automatically used as of the new effective date. The default date for a newly added sub-template file is the current system date. This effective date has no correlation with the effective date of the primary template. The as of date on the Query Report Viewer, Query Report |

| | |
|----------------------|--|
| | Scheduler, or Run Control page determines which effective dated templates and sub-templates are run. |
| Status | Select a status of <i>In Progress</i> , <i>Active</i> , or <i>Inactive</i> for the sub-template file. This field indicates the usability of the sub-template file. Runtime sub-template file selection logic uses this field in conjunction with the Effective Date field to determine which sub-template file should be used at runtime. At least one file must be active to save a sub-template in the Content Library. |
| Template File | A read-only field indicating the name of the sub-template file. |
| Upload | Click this button to attach an actual effective dated sub-template file. Once the sub-template is saved, this button becomes disabled. To reupload a new version of the sub-template, you must delete and re-add it. |
| Download | Click this button to download the sub-template to your local computer for updating. |
| View | Click this button to view the contents of the sub-template. |

Maintaining Template Translations

This section provides an overview of template translations and discusses how to:

- Search template translations.
- Maintain template translations.

Understanding Template Translations

The Template Translation component interfaces with both report definition templates and Content Library sub-templates. Template translation files can be created only when a report's template type is RTF. Template Translation is a separate component with no row level security, as the target user is different from the report developer, requestors, or viewers.

The Template Translation feature is based upon standard Localization Interchange File Format (XLIFF) .xlf file processing. Each report template or sub-template file can have related translation XLIFF files. These XLIFF files include translation units for each content element to be translated. The translatable units include all the fixed verbiage of the template excluding any values supplied by the data source. The Template Translations page includes an action button that generates a translatable file that must then be manually edited with the appropriately translated values. Once the translation exercise is complete, the XLIFF file is uploaded and integrated into the XML Publisher translation system.

The Template Translation Search page provides advanced search capabilities to facilitate the location and management of template translations. Using this search page, you can determine whether or not a particular translation exists. The search can be focused by template or report, thus handling both Report Definition templates and Content Library sub-templates. You can also search based on target language.

Note. A template must exist before it can be translated.

Template translations are not available for template types other than RTF. For a PDF report, there must be multiple PDF templates registered to the report, one for each locale or language as required.

Pages Used to Maintain Template Translations

| Page Name | Object Name | Navigation | Usage |
|------------------------------|-----------------|---|---------------------------------|
| Template Translations Search | PSXPTMPLTRNSRCH | Reporting Tools, XML Publisher, Translations | Search template translations. |
| Template Translations | PSXPTMPLTRNS | Reporting Tools, XML Publisher, Translations Select the effective date of the template or sub-template that you want to maintain translations for. | Maintain template translations. |

Searching Template Translations

Access the Template Translations Search page.

Template Translations

Enter any information you have and click Search. Leave fields blank for a list of all values.

Report Template
 Sub-Template

Report Name:

Template ID:

Base Language: =

Effective Date: =

Status: =

Target Language: = Translated

When using the IN or BETWEEN operators, enter comma separated values without quotes. i.e. JOB,EMPLOYEE,JRNL_LN.

Include History
 Correct History

[Basic Search](#)

Search Results

| Template Files | | | | |
|----------------|----------------------------|-------------|---------------|--------|
| Template ID | Effective Date | Report Name | Base Language | Status |
| QESMOKEXMLP_1 | 2006-02-15 | QESMOKEXMLP | English | Active |
| XRFWIN_1 | 1900-01-01 | XRFWIN | English | Active |

Template Translations Search page

To search for a template translation:

1. Select either the Report Template or the Sub-template option, depending on whether you want to search the Report Definition templates or the Content Library sub-templates.

The subsequent search prompts vary depending upon this choice. For example, the Report Name drop-down list box appears only if Report Template is selected.

2. Select your search criteria and click the Search button.

Report Properties

When the file to be translated is a report template, basic metadata about the report is displayed. This information is not displayed when the file selected is a Content Library sub-template.

| | |
|-------------------------|--|
| Data Source Type | A read-only field that indicates the report's corresponding data source type of <i>PSQuery</i> , <i>Rowset</i> , <i>XML Doc</i> , or <i>XML File</i> . |
| Data Source ID | A read-only field that indicates the report's data source ID. |
| Report Name | A read-only field that indicates the report's name. |
| Description | A read-only field that indicates the report's description. |

Template Properties/Sub-Template Properties

The Template Properties/Sub-Template Properties group box displays basic metadata about the base language template file that has been selected for translation.

| | |
|-----------------------------------|---|
| Description | A read-only field that indicates the template's description. |
| Base Language | A read-only field that indicates the base language of the template. |
| Channel | A read-only field that indicates the distribution channel for the template. |
| Template File | A read-only field indicating the name of the template file. |
| Status | A read-only field indicating a status of <i>In Progress</i> , <i>Active</i> , or <i>Inactive</i> for the template file. |
| Download | Click this button to open or save the base template file. |
| Preview/View | For report templates, click the Preview button to preview the report template with sample data from the sample data file that was registered with the data source. The Preview button is not enabled when there is no sample data file registered with the data source. For sub-templates, click the View button to view the sub-template file. |
| Generate Translatable File | Click this button to generate an .xlf file, which includes all translatable units extracted from the selected (sub)template file's fixed text. This file must be saved locally and then manually translated. |

Translatable Files

The generated translatable XLIFF file includes the template's static headings and body text that require translation into another language. At the top of the file, the `<source-language>` tag indicates the base language value. The `<target-language>` tag must be updated to the language you are translating into. Initially the `<source-language>` and `<target-language>` values are the same. Prior to uploading the translated file into the database, the `<target-language>` tag must be edited to the translated language code. The value must be the two character ISO language code.

For example, `fr` equals French, `jp` equals Japanese, and so on. The file won't load if the file type isn't .xlf or if the `<source-language>` equals the `<target-language>`, and an error message is presented.

In the <body> section of the file, each <trans-unit id> tag contains both a <source> tag and a <target> tag. The <source> tag contains the text in the base language. The corresponding <target> tag contains the translate fixed text.

There is no naming restriction on XLIFF files, however, it is advised to keep them close to the template file name and include the language. For example, for a French translation of the XRFWIN template, you could use XRFWIN_FR.xlf.

Below is an example of a translated XLIFF file:

```
<?xml version="1.0" encoding="utf-8" ?>
- <xliff version="1.0">
- <file source-language="en-US" target-language="fr-FR" datatype="XDO"
  original="orphen.rtf" product-version="orphen.xlf" product name="">
  <header />
- <body>
- <trans-unit id="4d3eb24" maxbytes="4000" maxwidth="15"
  size-unit="char" translate="yes">
  <source>Total</source>
  <target>Totale</target>
  <note>Text located: body/table</note>
</trans-unit>
- <trans-unit id="a2bad3c3" maxbytes="4000" maxwidth="22"
  size-unit="char" translate="yes">
  <source>Seq Name</source>
  <target>Nom de Seq</target>
  <note>Text located: body/table/table header</note>
</trans-unit>
```

Translation Files

The Translation Files grid is where you maintain the translated XLIFF files for your templates.

| | |
|-------------------|---|
| Active | Once uploaded, the translated template must be <i>Active</i> to make that language translation available at runtime. The file is <i>Active</i> by default. |
| XLIFF File | Click the name of the uploaded translation file to open or save the file. This action opens a new window that displays the file per the user's browser and OS settings and allows for updating and reloading the file. |
| Language | A read-only field that indicates the language the file was translated to. During the upload of the translated file, the system determines the language from the <target-language> tag and automatically updates the template translation metadata. |
| Preview | Select this link to display a translated version of the report in a new window. This link is active only if the report's data source has a sample data file. No link is available for sub-templates, as there is no report context to preview. |
| Upload | Select this link to browse and upload the translation file. |

Running XML Publisher Reports

You can view and schedule query-based reports with XML Publisher.

This section discusses how to:

- Run reports in Query Report Viewer.
- Schedule reports in Query Report Scheduler.

See [Appendix A, “Working with XML Publisher Technology,” page 43](#).

Pages Used to Run XML Publisher Reports

| Page Name | Object Name | Navigation | Usage |
|------------------------|-----------------|--|---|
| Query Report Viewer | PSXPQRYVIEWER | Reporting Tools, XML Publisher, Query Report Viewer | View query-based report online without persisting the results. Reports are viewed from a search page. |
| Query Report Scheduler | PSXPQRYRUNCNTRL | Reporting Tools, XML Publisher, Query Report Scheduler | Select a run control ID and submit a process request to schedule query-based reports. |
| XMLP Report Search | PSXPRTMGR | Reporting Tools, XML Publisher, XMLP Report Search | Search the XML Publisher Report Repository. |

Running Reports in Query Report Viewer

The Query Report Viewer allows selection and online viewing of those reports that have a data source type of PeopleSoft Query. Existing Query security applies so that each user has access to run only the reports to which he or she has qualified Query access to the data source.

Access the Query Report Viewer page.

Query Report Viewer
Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search by: begins with

[Advanced Search](#)

Search Results [Hide Template Prompts](#)

| Report Name | Description | Data Source ID | *Template ID | As Of Date | *Format | Burst | View Report |
|-------------|--------------------------------|---------------------|--|---|----------------------------------|-------|-----------------------------|
| MSGLIST | Message List | MESSAGES_FOR_MSGSET | <input type="text" value="MSGLIST_1"/> | <input type="text" value="02/06/2006"/> | <input type="text" value="HTM"/> | N | View Report |
| XRFWIN | Cross Reference Window Listing | XRFWIN | <input type="text" value="XRFWIN_1"/> | <input type="text" value="02/06/2006"/> | <input type="text" value="HTM"/> | N | View Report |

Query Report Viewer page

Show Template Prompts

Click this link to expand the Report Definition Search Results grid to include the template ID and as of date template prompts.

Report Name

A read only field that indicates the name of the report.

Description

A read-only field that indicates the report’s description.

| | |
|-----------------------|---|
| Data Source ID | A read-only field that indicates the report's data source ID. |
| Template ID | Select from the templates associated with the report definition. |
| As Of Date | Select the as of date for the template version you want to view. |
| Format | Select from the output format choices associated with the report definition. |
| Burst | <p>A read-only field that indicates whether the report definition includes bursting instructions.</p> <p>Bursted reports are listed, but they aren't executable from the Query Report Viewer component.</p> <hr/> <p>Note. Bursted reports must be run from the Query Report Scheduler component.</p> <hr/> |
| View Report | <p>Click this link to view the report online. When they exist, the Query's runtime parameters are presented.</p> <p>A new window opens displaying the report results according to the runtime inputs. You can save the report results locally by using the browser's Save functionality.</p> <hr/> <p>Note. This link is disabled for bursted reports.</p> <hr/> |

Note. The data and template translation language choice automatically defaults to the user's session language.

Scheduling Reports in Query Report Scheduler

Query Report Scheduler uses the existing Process Scheduler functionality to:

- Select runtime parameters for query-based reports.
- Monitor the report process request.
- Post and secure the results to either the Report Manager, a printer, or the Process Scheduler file directory.

Note. If a query is run through Reporting Tools, Query, Schedule Query, the XML Publisher-related prompts do not appear. Only the basic table-formatted query results are generated.

Access the Query Report Scheduler page.

Query Report Scheduler

Run Control ID: T4_Burst_Multi [Report Manager](#) [Process Monitor](#)

Language: English

Report Definition

*Report Name: t4 Burst tst for multi in file

Burst Field Name: MESSAGE_SET_NBR

Dynamic Template: Inactive **Bursting Security:** Inactive

Template ID: Basic

Template As Of Date: Channel:

[Update Parameters](#)

| Query Parameters | |
|------------------|--------------|
| Prompt Name | Prompt Value |
| MESSAGE_SET_NBR | 3 |

[Go to XMLP Report Search](#)

Query Report Scheduler page

- Run Control ID** Enter a run control ID.
- Language** A read-only field that indicates language of the run control.
The report selects data and template translations based upon the language code of the run control. This value is set by the user on the My System Profile, General Profile Information page in the My Preferred Language for Reports and Email field. The language is displayed in the Query Report Scheduler Search Results so you are informed of the language selection criteria.
- Report Name** Select the name of the Query-based report that you want to schedule.
The drop-down list box values are based on previously registered report definitions. Existing Query security applies so that each user only has access to run reports to which they have Query access.
- Burst Field Name** A read-only field that displays the value set in the Burst byfield of the Report Definition, Bursting page. This field appears for bursted reports only.
- Dynamic Template** A read-only field that displays either *Active* or *Inactive* depending on whether there is criteria to dynamically select the template and/or language based upon a data value set in the Template group box of the Report Definition, Bursting page. This field appears for bursted reports only.
- Bursting Security** A read-only field that displays either *Active* or *Inactive* depending on whether there is criteria to assign unique bursting security set in the Burst Security group box of the Report Definition, Bursting page. This field appears for bursted reports only.
- Template ID** Select from the templates associated with the report definition.

| | |
|---------------------------------|---|
| Template As Of Date | (Optional) Select the as of date for the template version to use for the report. The system looks at the report definition for templates that are active as of this date. |
| Channel | A read-only field that indicates the distribution channel of the template. |
| Update Parameters | Click this link to update the Query's runtime prompt values. The first time a report is selected to be assigned to the run control ID, all existing Query prompts and prompt values also appear. |
| Report Manager | Click this link to go to the Report Manager to check the progress of your process request and to view the report content immediately after the output file is posted. The final output file is posted to the Report Manager repository for web access by authorized users. See <i>Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler</i> , "Using Report Manager". |
| Process Monitor | Click this link to go to the Process Monitor to check the progress of your request. See <i>Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler</i> , "Using Process Monitor". |
| Run | Click this button to access the Process Scheduler Request page. The Process Scheduler Request page enables you to specify variables, such as where a process runs and in what format the process output is generated. The values for output type and output format appear by default per the report definition and can be changed if the report definition allows it. Distribution options are also active allowing updates to viewers, again only as allowed in the report definition. |
| Go to XMLP Report Search | Click this link to access the XMLP Report Search page. See Chapter 4, "Using XML Publisher," Searching the XML Publisher Report Repository, page 39 . |

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests".

Searching the XML Publisher Report Repository

Access the XML Publisher Report Search page.

XMLP Report Search

[Report Manager](#) [Process Monitor](#)

Report Definition ID: Cross Reference Window Listing

Folder Name: Instance: to

Created On: or Last Days

View Reports Using Search Keys Case Sensitive

MENUNAME

| Reports | | | | | | |
|---|--|---------|----------------------|-----------------|-----------|---------------|
| Customize Find View All <input type="button" value="📅"/> | | | | | | |
| First <input type="button" value="⏪"/> 1-2 of 2 <input type="button" value="⏩"/> Last | | | | | | |
| Report | Report Description | Folder | Completion Date/Time | Expiration Date | Report ID | Prce Instance |
| 1 XMLP | XRFWIN [SDK_PORTAL_COMPONENTS] CROSS REFERENCE WINDOW LISTING | GENERAL | 04/25/06 11:30AM | 04/26/2006 | 36 | 9999945 |
| 2 XMLP | XRFWIN [SDK_INTEGRATION_TECHNOLOGIES] CROSS REFERENCE WINDOW LISTING | GENERAL | 04/25/06 11:30AM | 04/26/2006 | 35 | 9999945 |

XMLP Report Search page

Enter criteria to filter the reports to list. XML Publisher Report Search ignores criteria for fields that are blank.

- Report Definition ID** (Optional) Select the name of the report definition to search on.
- Folder Name** (Optional) Select a specific folder to list only the reports that are contained in that folder.
- Created On** (Optional) Use the calendar, or enter a specific date to list only reports that are created on that date.
- Instance and to** (Optional) Enter a range of process instances. Leave the to field blank to list all instances after the number that you enter in the Instance field.
- Last** (Optional) Use to display only those reports that were created in the last number of days, hours, or minutes. For example, to list only those reports that were created within the last two hours, enter 2 and select *Hours*.
- Report Manager** Click this link to go to the Report Manager.
See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*, “Using Report Manager”.
- Process Monitor** Click this link to go to the Process Monitor.
See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*, “Using Process Monitor”.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*, “Using Report Manager,” Viewing Reports.

Viewing Reports Using Additional Search Keys

Users are also able to search by the following criteria for bursted reports:

- A specific value in the Burst By field.

This is a read-only field that displays automatically when there is a value set in the Burst byfield of the Report Definition, Bursting page.

- Up to two additional values in the predefined bursting Search Key fields.

These drop-down list boxes display the values set in the Search Keysregion of the Report Definition, Bursting page.

To view bursted reports using the additional search keys:

1. Select the Case Sensitive check box to perform a case sensitive search.
2. For the Burst By field, select a search operator.
3. Enter a value to search on.
4. For the additional Search Key fields, select the search field name that you want to search on.

Then select a search operator and a value to search on.

See [Chapter 4, “Using XML Publisher,” Setting Bursting Options, page 22.](#)

APPENDIX A

Working with XML Publisher Technology

This chapter discusses how to:

- Manage objects.
- Create a custom report.
- Run reports.

Managing Objects

To facilitate the movement of reports and templates from development to test and then to production, XML Publisher objects are available as managed objects that can be placed into projects for migration from database to database.

To facilitate the location of report-related objects, these items can be identified based on object owner ID:

- Data sources.
- Report definitions.
- Templates.

Note. Since XML Publisher is based on managed objects, it is important to understand that direct SQL updates to your data are not recommended because of the complexity of the various report objects and their relationships. Instead, update your data using the PeopleSoft XML Publisher Pure Internet Architecture pages and PeopleSoft Application Designer.

Note. Because XML Publisher uses managed object functionality, you do not have the ability to use the switching feature of multi-language data entry. You can populate related language tables by logging in and establishing a different session language. The related language table for that session can then be populated.

See *Enterprise PeopleTools 8.48 PeopleBook: Global Technology*, “Working With PeopleSoft Applications in Multiple Languages” and *Enterprise PeopleTools 8.48 PeopleBook: Internet Technology*, “Understanding PeopleSoft Pure Internet Architecture”.

Creating a Custom Report

This section provides an overview of custom reports and discusses how to:

- Choose a template.

- Pass parameters.
- Burst reports.

Understanding Custom Reports

All report runtime functionality is available using the PeopleCode XML Publisher classes. The classes and methods you use to define custom reports respect the report category security assigned to the report definition. Users with read-only access to report definitions are not be able to edit them.

A process type of *XML Publisher* is delivered as system data and is available on the PeopleTools, Process Scheduler, Process Definition page. When application processes are defined and assigned the *XML Publisher* process type, entries for output type and format on the runtime Process Scheduler Request page reflect the definitional metadata under the XML Publisher report definition.

If the XML Publisher report is run through the Process Scheduler, the report name must be the same as the Process Scheduler process name. The Application Engine process that extracts the data must also have the same name as the process name. Therefore, XML Publisher report name, Process Scheduler process name, and the Application Engine process name are the same.

Runtime classes are available to call and pass in XML data and a choice of report template to the XML Publisher core engine to generate the output in a desired format. For online viewing, a function is available to pass the output back to the browser. Processing a report through the Process Scheduler posts XML Publisher output entries to the web, the Report Manager, or both according to the existing processes. When processes are categorized under the XML Publisher process type, the capability to establish output destination, format, and authorized viewer choices from the related report definition is enhanced. A search method is also available for accessing reports in the report repository.

See [Chapter 4, “Using XML Publisher,” Creating Report Definitions, page 13](#).

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Process Scheduler*, “Defining PeopleSoft Process Scheduler Support Information”.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleSoft Application Engine*, “Creating Application Engine Programs”.

See *Enterprise PeopleTools 8.48 PeopleBook: PeopleCode API Reference*, “XML Publisher Classes”.

Choosing a Template

Since report definition information is available using the PeopleCode XML Publisher classes, you can incorporate prompts on runtime pages to select reports and templates. You must pass in XML data and a choice of report template to the XML Publisher core engine to generate the output in a desired format.

You can retrieve a particular template file or expose a choice of templates at runtime. Only active reports and templates are retrieved. An As of Date is also required to coordinate with the template file’s effective date. If not supplied, the As of Date is assumed to be the system date. At runtime, the template As of Date is used to select the appropriate active effective-dated template and sub-template that is current as of that date.

A PeopleCode class is available to retrieve a report’s template IDs based on a channel value, although it is not exposed on a PeopleSoft PeopleTools-delivered Pure Internet Architecture page. You can also incorporate template administration functionality directly into your application pages. This functionality includes creating the definitions and storing the related files, as well as querying to find the templates associated with a report definition.

Your run control page should be a combination of the PeopleSoft PeopleTools-supplied run control subpage and the application-specific section for runtime parameters for the data extraction program. It should include report, template name, language, and as of date. Depending upon your application design, these values could be systematically deduced from user preferences, come from program defaults, or come from operator input selection.

Passing Parameters

It may be necessary to pass runtime parameters into the XML Publisher core engine. Numbers and text are sent as strings with single quotes.

The `ReportDefn` class `ProcessReport` method always passes the following parameters. These tag names can be included in report templates and sub-templates. When needed, the following instructions must be entered under form fields at the top of the report's primary template; one for each value:

- `<xsl:param name="ReportID" xdofo:ctx="begin"/>`
- `<xsl:param name="ReportTitle" xdofo:ctx="begin"/>`
- `<xsl:param name="RunDate" xdofo:ctx="begin"/>`
- `<xsl:param name="RunTime" xdofo:ctx="begin"/>`

These tags can be included in the template layout wherever they are needed. These parameters are especially useful for report headers.

The PeopleSoft-delivered XML Publisher report `XRFWIN` demonstrates the usage of these values in a report calling a sub-template for a header.

For the standard parameter passage of Report ID and Report Description, the translation of report descriptions may become important for report headers. XML Publisher includes PeopleSoft Related Language tables for the data source, and report and template tables that support the report's data language values for the description fields.

Bursting Reports

The `ReportDefn` class `ProcessReport` method has code built in to process a single report request to create multiple output files per the bursting instructions defined on the report definition. Bursting always occurs at runtime if a burst value is stored in the report definition's burst field value.

See [Chapter 4, "Using XML Publisher," Setting Bursting Options, page 22](#).

Running Reports

This section discusses how to:

- Use the Process Scheduler Request page.
- Customize printed report output.
- Distribute reports.
- Search for reports.
- Monitor requests.

Using the Process Scheduler Request Page

At runtime, the Process Schedule Request page appears after you click the Run button on the run control page. This page includes operator selectable choices of output type and output format. Output type choices reflect the location values from the report definition. Output Format choices reflect the output format values from the report definition.

Since values for output location, output format, and viewer security are associated with each report definition, these values should be passed to the Process Schedule Request page. These values are passed automatically only when the process definition type is *XML Publisher*.

Customizing Printed Report Output

The PeopleSoft application support batch printing XML Publisher reports directly from a server using PDF output format. Printers with Postscript level 3 interpreter natively support printing PDF format. You can also convert the generated PDF report files to conventional formats supported by other printers, such as Postscript or PCL, by using an external software program. The PeopleSoft application provides PeopleCode support for sending PDF files directly to a specified printer, and it also provides customization capability for inserting conversion logic from PDF to different printer formats.

Generated XML Publisher reports are sent to a printer by calling the `PrintOutput` method after using the `ProcessReport` method, as follows:

```
&MyReportDefn.ProcessReport("myTemplate", "", %Date, "PDF");
&MyReportDefn.PrintOutput(&PrinterPath);
```

If you want to insert conversion logic from PDF to a different printer format before an output file is sent to a printer, create a batch file named `psxpprint.bat` on Microsoft Windows or `psxpprint.sh` on Unix under Process Scheduler server's home directory `%PS_HOME%\appserv\prcs\%domain_name%` and write a call to an external conversion program in this batch file.

The following is a sample from a `psxpprint.bat` batch file on Microsoft Windows that uses a program called `pdftops` to convert a PDF file generated by XML Publisher to a Postscript level 2 file:

```
@echo PRINT JOB LOG > %RPTOUTDIR%\prtjob.log
c:\user\bat\pdftops -level2 %REPORTFILE% %RPTOUTDIR%\out.ps >> %RPTOUTDIR%\
\prtjob.log
copy %RPTOUTDIR%\out.ps %DESTPRINTER% >> %RPTOUTDIR%\prtjob.log
```

In the batch file, you can use the following variables, which the `ReportDefn.PrintOutput()` method replaces with actual data correct at the runtime of the report:

| Variable | Description |
|----------------------------|---|
| <code>%RPTOUTDIR%</code> | Full path to the report output directory. |
| <code>%REPORTFILE%</code> | Full path to the report output file. |
| <code>%DESTPRINTER%</code> | Full path to the destination printer. |

See [Chapter 4, "Using XML Publisher," Setting Output Options, page 19](#).

Distributing Reports

PeopleCode options are available for posting your generated report to a file server, printing it, or publishing it to the Report Manager with appropriate security.

For online viewing, a method is available for passing the output back to the browser. No report results are persisted, but the user viewing the results can use the browser's Save As feature to retain the report file locally.

When the output type is *Printer*, the output format is limited to PDF. A printer location must be specified, and the printer must be capable of printing PDF output. If the output file is large, adequate memory must be available on the print server.

Distribute To IDs are those defined in the Report Definition, Security page. Distribution functionality within the Process Scheduler is enhanced to assign values systematically per the XML Publisher report definition. The Report Definition, Security page provides choices for selecting a Report Manager folder as well as the ability to assign viewing rights to additional roles or user IDs at runtime if so allowed by the report definition.

When the report definition has the Allow viewer ID assignment at report runtime check box selected, the report requestor can add or delete IDs. If no viewers are assigned, by default the requestor's ID is added systematically.

Searching for Reports

A search method is available for accessing reports in the Report Manager repository. The PeopleCode uses additional search keys based on the report definition's additional metadata.

See [Chapter 4, "Using XML Publisher," Setting Bursting Options, page 22](#) and [Chapter 4, "Using XML Publisher," Searching the XML Publisher Report Repository, page 39](#).

Monitoring Requests

The Process Scheduler processes XML Publisher-based reports. Multiple related activities can be defined as separate processes. For example, generation of the XML data, the XML Publisher merging of that data with the template and creating the final output, and the subsequent post-processing to send related emails. Each process appears separately in the Process Monitor. Error messages indicate whether the problem is on the data extraction or the XML Publisher portion of the report request.

APPENDIX B

Creating Report Templates

Template design involves the construction of a report's layout in a template file and is dependent upon what the core Oracle XML Publisher engines accept for processing.

This chapter discusses:

- RTF templates.
- PDF templates.
- eText templates.
- XSL templates.

See Also

Oracle XML Publisher Core Components Guide.

Enterprise PeopleTools 8.48 PeopleBook: PeopleCode API Reference, "XML Publisher Classes"

RTF Templates

RTF templates support most XSL functionality and can be designed with robust processing and formatting code.

This section discusses how to:

- Create RTF templates.
- Incorporate sub-templates.
- Include images.

Creating RTF Templates

To create an RTF template using Microsoft Word:

1. Download the delivered XML Publisher Template Builder plug-in for offline template design on the Reporting Tools, XML Publisher, Setup, Design Helper page to facilitate the insertion of application data tags into your RTF templates.

The XML Publisher Template Builder is an extension to Microsoft Word that simplifies the development of RTF templates. While the Template Builder is not required to create RTF templates, it provides many automated functions that may increase your productivity.

Note. You can choose to automatically view the Word Template Builder Tutorial File, Word Template Builder Tutorial.doc, upon installing the plug-in. This document offers a quick and informative tutorial of the Template Builder.

The Word Template Builder Tutorial.doc is located in the \\Word Template Builder\doc directory of the folder where Oracle XML Publisher Desktop, the XML Publisher Template Builder plug-in, was installed.

2. Download the XML schema and sample data files by clicking the Data Schema and Sample Data links on the Reporting Tools, XML Publisher, Report Definition page for a specified query.
3. Load the schema and sample data into the document by selecting Data, Load Schema or Load XML Data from within the Microsoft Word Template Builder tool bar menu.

4. Design your template in the RTF document.

By using the downloaded schema or XML sample data, you can insert the data field tags into your template rather than manually typing XSL-formatted tags.

You can preview the template output with the sample XML data by selecting either Adobe Acrobat Reader (PDF), Microsoft Word file (RTF), Microsoft EXCEL (EXCEL), or a browser (HTML) from the Microsoft Word Preview menu.

5. Upload the completed template into the report definition by clicking the Upload button on the Reporting Tools, XML Publisher, Report Definition, Template page.

See *Oracle XML Publisher Core Components Guide, Creating an RTF Template*.

See “\\Word Template Builder\doc\Word Template Builder Tutorial.doc.”

See [Chapter 3, “Setting Up XML Publisher,” Working with Template Design Helpers, page 11](#) and [Chapter 4, “Using XML Publisher,” Creating Report Definitions, page 13](#).

Incorporating Sub-templates

When designing a template, you can incorporate one or more sub-templates into your primary template.

Specific syntax must be used to:

- Create sub-templates.
- Import sub-templates.
- Call sub-templates.

See [Chapter 4, “Using XML Publisher,” Using the Content Library to Maintain Sub-templates, page 28](#).

Creating Sub-templates

Within a single sub-template file, multiple sub-template components can be available. Start and end template indicators must exist to distinguish those various components.

```
<?template:component_name?>
<?end template?>
```

For example, syntax of a sub-template file containing two components could be:

```
<?template:peoplesoft?>
Pleasanton Campus
500 Oracle Lane
```

```
Pleasanton, CA 94488
<?end template?>
```

```
<?template:logo2x.5?>
  Oracle_Logo
<?end template?>
```

where `<?template:peoplesoft?>` is the start template indicator of the component *peoplesoft* and `<?template:logo2x.5?>` is the start template indicator of the component *logo2x.5*. Each `<?end template?>` tag indicates the end of its respective component.

Importing Sub-templates

To import a sub-template file that is stored in the Content Library, the following syntax must be placed at the top of the primary template file:

```
<?import:psxmlp://sub-template_NAME?>
```

where `sub-template_NAME` is the registered sub-template ID in the Content Library. This syntax must be in Normal text.

Calling Sub-templates

The following syntax must be placed in the primary template file in the location where the desired text or XSL instructions from the sub-template file should appear:

```
<?call-template:peoplesoft?>
```

where `peoplesoft` is the name of the component that you want to use in the sub-template file.

Note. Primary templates calling nonexistent or inactive sub-templates presents an error indicating the reason for the problem. This error information is incorporated into Process Scheduler error handling as well as into online viewing or previewing of the report.

See [Chapter 4, “Using XML Publisher,” Running XML Publisher Reports, page 36](#).

Including Images

XML Publisher supports a number of methods for including images in your reports:

- Inserting images.
- Referencing images.
- Importing images.

Inserting Images

To directly insert a .jpg, .gif, or .png image file into a template:

1. Select Insert->Picture->From File while the template is open in Microsoft Word.
2. Select the desired .jpg, .gif, or .png file to insert into the template.
3. Save the template.

Note. It is advised to use the Microsoft Word *Insert* menu option to insert the image, as the additional properties that need to be set for the RTF template to correctly generate reports with those images are automatically set by using this method. Additionally, dragging and dropping an image onto a template creates a link to the local machine being used and may cause problems when the report is generated.

Referencing Images

To reference images with a URL:

1. Insert a dummy image into the template in the appropriate location.
 2. In the Format Picture dialog box in Microsoft Word, select the Web tab.
Enter the following syntax in the Alternative Text region to reference the URL image:
url: { 'http://image location' }.
For example: url: { 'http://www.oracle.com/images/ora_logo.gif' }.
-

Note. The user has to be online to access the image referenced in the URL.

Importing Images

To import an image from a sub-template file:

1. Embed the .jpg, .gif or .png into the sub-template file.

For example,

```
<?template:logo2x.5?>
  Oracle_Logo
<?end template?>
```

where Oracle_Logo is the actual .jpg, .gif, or .png.

2. Import the sub-template file that includes the image by including the following syntax at the top of the primary template file:

```
<?import:psxmlp://sub-template_NAME?>
```

where sub-template_NAME is the registered sub-template ID in the Content Library.

3. Insert a dummy image into the primary template in the appropriate location.
4. Add the calling details in the Format Picture dialog box in Microsoft Word using the syntax:

```
<?call-template:logo2x.5?>
```

where logo2x.5 is the name of the component that contains the image in the sub-template file.

See [Appendix B, “Creating Report Templates,” Incorporating Sub-templates, page 50.](#)

PDF Templates

This section discusses:

- Working with PDF templates.
- Creating PDF templates.
- Mapping data tags.

See [Chapter 4, “Using XML Publisher,” Associating Templates, page 17](#).

Working with PDF Templates

PDF templates do not require a plug-in for offline template design. A mapping feature for XML data element tags is enabled when the PDF template file is uploaded into the Reporting Tools, XML Publisher, Report Definition, Template page. The XML Publisher PDF mapping functionality allows you to match existing form fields in a PDF template with data schema field tags.

If you are not using a third party PDF template, you don't need to map data tags if you create PDF template field names and XML data tags that are the same to begin with. You can also change the PDF template field names to match your XML data tags.

The following guidelines need to be adhered to when working with PDF templates whether or not you are mapping PDF template fields and tags:

- The PDF document must allow editing.

Check the Security setting in the File, Document Properties, Summary page.

- Files must be Adobe Acrobat 5.0 compatible.

If you are using a later version of Adobe Acrobat, go to File, Reduce File Size and select the Make Compatible with: *Acrobat 5.0 and later* option.

- Files must have form fields for the placement of application data, with each field tag being unique.

If no form fields exist, use the Adobe Professional version to add field tags. If there are duplicate tags or non-unique tags in forms obtained from third parties, use Adobe Professional to update the tags.

- Files should not have embedded javascript.

XML Publisher removes it during the course of the `Map Enablement` function when the Generate button on the Reporting Tools, XML Publisher, Report Definition, Template page is selected.

Processing PDF Templates

The Oracle XML Publisher Core Engine adheres to the following rules when processing PDF templates:

- The hierarchy of the XML is ignored.
- The search for the tag that matches the field name starts at the end of the XML file.
- The first match of the tag is used for the field value.
- If the tag is not found, it looks at the map file (if provided).

This means that even if the form is mapped, when there is a tag in the XML data that matches the PDF template form field tag, it has priority over the map for placing the data.

Creating PDF Templates

To create a PDF template without mapping tags using Adobe Acrobat:

1. Design your template in the PDF document as documented in the *Oracle XML Publisher Core Components Guide*.

Be sure that the PDF template field names match the XML data tags.

2. Upload the completed template into the Report Definition by clicking the Upload button on the Reporting Tools, XML Publisher, Report Definition, Template page.

Note. XML Publisher supports Adobe Acrobat 5.0 (PDF specification version 1.4). If you are using a later version of Adobe Acrobat, use the File, Reduce File Size option to save your file as Adobe Acrobat 5.0 compatible.

See *Oracle XML Publisher Core Components Guide, Creating a PDF Template*.

Mapping Data Tags

Third parties most often supply PDF templates where the form fields already exist inside the form template. In order for the XML data element tags to know where they should print within the PDF template, a mapping is required between the field elements from the data source and the form field elements in the PDF template. By taking a PDF form with editable form fields and mapping those fields to XML schema fields generated by PeopleSoft Query or from any other data source's XML schema, the template is ready for use by XML Publisher.

Prior to being able to perform this mapping, some XML Publisher-specific pre-processing of the file is required. This processing requires the existence of an OPEN schema and the report's data source. Adobe Standard or above and version 6 or above is required for the template mapping. In the event that the PDF form does not have form fields, the form field and tags can be inserted using the Designer or Professional versions of Adobe. The form field tags can then be mapped to the schema tags.

To create a PDF template by mapping data element tags using Adobe Acrobat:

1. Upload the PDF template file to be mapped by clicking the template file Upload button on the Reporting Tools, XML Publisher, Report Definition, Template page.

2. Generate the file to be mapped by clicking the map file Generate button.

Generate creates a map-enabled PDF and allows you to access the data tags by placing schema and sample data into the PDF file.

3. Visually map the data tags to the form's field tags.

The mapping exercise is performed offline within the Adobe Acrobat application.

4. Once complete, save the file locally with a new name.

Some indication of mapping should be included in the name to distinguish it from the unmapped file. For example, i9m.pdf.

5. Upload the mapped PDF file on the Reporting Tools, XML Publisher, Report Definition, Template page by selecting the map file Upload button.

When uploaded to the server, the mapping information is stored along with the PDF form template.

Note. When the PDF template's field names already the same as the data source's data tag names, then no mapping or uploading of a map file is required.

Note. PDF file security has to allow editing and saving for the mapping to be completed. The ability to perform these functions depends on the Adobe version you are working with.

Note. If no map file exists for your PDF file, selecting the Preview button on the Reporting Tools, XML Publisher, Report Definition, Template page won't show any data.

XML Publisher and Adobe

XML Publisher provides the following features within Adobe:

- A visual indication of the PDF form fields that have been mapped.
A dark blue outline displays around the mapped form fields.
- Display of the mapped field tag name when the cursor hovers over the PDF form field.
- A pop-up dialogue containing a schema tag list that you can select from to insert the field tag when you click on the PDF form field.
- Preparation of the PDF form for uploading to the report definition when you save the file locally by doing a File, Save.

eText Templates

eText templates are RTF-based templates that are used to generate flat file text output that can be transmitted to a bank or other customer for Electronic Funds Transfer (ETF) or Electronic Data Interchange (EDI). Because the output is intended for electronic communication, these templates must follow specific format instructions for data placement.

See *Oracle XML Publisher Core Components Guide, eText Templates*.

XSL Templates

For more complex design requirements, a number of XSL and XSL-FO elements are supported for use with your XSL templates.

See *Oracle XML Publisher Core Components Guide, XSL, SQL, and XSL-FO Support*.

Glossary of PeopleSoft Enterprise Terms

| | |
|------------------------------|---|
| absence entitlement | This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period. |
| absence take | This element defines the conditions that must be met before a payee is entitled to take paid time off. |
| academic career | In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on). |
| academic institution | In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes. |
| academic organization | In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division. |
| academic plan | In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career. |
| academic program | In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates. |
| accounting class | In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs. |
| accounting date | The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date. |
| accounting split | The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields. |
| accumulator | You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated. |
| action reason | The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Enterprise Human Resources, PeopleSoft Enterprise Benefits |

| | |
|--------------------------------|--|
| | Administration, PeopleSoft Enterprise Stock Administration, and the COBRA Administration feature of the Base Benefits business process. |
| action template | In PeopleSoft Enterprise Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition. |
| activity | <p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p> |
| address usage | In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address. |
| adjustment calendar | In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount. |
| administrative function | In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area. |
| admit type | In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications. |
| agreement | In PeopleSoft Enterprise eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination. |
| allocation rule | In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules. |
| alternate account | A feature in PeopleSoft Enterprise General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments. |
| analysis database | In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered |

for satisfying a requirement but that are rejected. It also contains information on courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

| | |
|-------------------------------|---|
| Application Messaging | PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft Enterprise and third-party applications. An application message defines the records and fields to be published or subscribed to. |
| AR specialist | Abbreviation for <i>receivables specialist</i> . In PeopleSoft Enterprise Receivables, an individual in who tracks and resolves deductions and disputed items. |
| arbitration plan | In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced. |
| assessment rule | In PeopleSoft Enterprise Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action. |
| asset class | An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification. |
| attribute/value pair | In PeopleSoft Enterprise Directory Interface, relates the data that makes up an entry in the directory information tree. |
| audience | In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences. |
| authentication server | A server that is set up to verify users of the system. |
| base time period | In PeopleSoft Enterprise Business Planning, the lowest level time period in a calendar. |
| benchmark job | In PeopleSoft Enterprise Workforce Analytics Solution, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources. |
| billing career | In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers. |
| bio bit or bio brief | In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports. |
| book | In PeopleSoft Enterprise Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets. |
| branch | A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager. |
| budgetary account only | An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account." |
| budget check | In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning. |
| budget control | In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. |

For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

| | |
|--------------------------|--|
| budget period | The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar. |
| business activity | The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process. |
| business event | In PeopleSoft Enterprise Receivables, defines the processing characteristics for the Receivable Update process for a draft activity. In PeopleSoft Enterprise Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example). |
| business process | A standard set of 17 business processes are defined and maintained by the PeopleSoft Enterprise product families and are supported by the Business Process Engineering group. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth. See also <i>detailed business process</i> . |
| business task | The name of the specific function depicted in one of the business processes. |
| business unit | A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions. |
| buyer | In PeopleSoft Enterprise eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system. |
| campus | In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career. |
| catalog item | In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities. |
| catalog map | In PeopleSoft Enterprise Catalog Management, translates values from the catalog source data to the format of the company's catalog. |
| catalog partner | In PeopleSoft Enterprise Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content. |
| categorization | Associates partner offerings with catalog offerings and groups them into enterprise catalog categories. |
| category | In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions. |
| channel | In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event. |
| ChartField | A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft Enterprise application. ChartField values represent individual account numbers, department codes, and so forth. |

| | |
|------------------------------------|---|
| ChartField balancing | You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction. |
| ChartField combination edit | The process of editing journal lines for valid ChartField combinations based on user-defined rules. |
| ChartKey | One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination. |
| checkbook | In PeopleSoft Enterprise Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions. |
| checklist code | In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page. |
| class | In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term. See also <i>course</i> . |
| Class ChartField | A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> . |
| clearance | In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Enterprise Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period. |
| clone | In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change. |
| cohort | In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>division</i> . |
| collection | To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleTools maintains a set of collections (one per language code) for each search index object. |
| collection rule | In PeopleSoft Enterprise Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances. |
| comm key | See <i>communication key</i> . |
| communication key | In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users. |

| | |
|--|---|
| compensation object | In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation. |
| compensation structure | In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects. |
| component interface | A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft Enterprise database information using a program instead of the PeopleSoft client. |
| condition | In PeopleSoft Enterprise Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due. |
| configuration parameter catalog | Used to configure an external system with PeopleSoft Enterprise. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server. |
| configuration plan | In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions. |
| constituents | In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE). |
| content reference | Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets. |
| context | In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running. In PeopleSoft Enterprise Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions. In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level. |
| control table | Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data. |
| cost-plus contract line | A rate-based contract line associated with a fee component of Award, Fixed, Incentive, or Other. Rate-based contract lines associated with a fee type of None are not considered cost-plus contract lines. |
| cost profile | A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book. |
| cost row | A cost transaction and amount for a set of ChartFields. |
| course | In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and |

credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.

See also *class*.

| | |
|-----------------------------------|---|
| course share set | In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement. |
| current learning | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs. |
| data acquisition | In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS). |
| data cube | In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager. |
| data elements | Data elements, at their simplest level, define a subset of data and the rules by which to group them. For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups. |
| dataset | A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles. |
| delivery method | In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Enterprise Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, and rail). The delivery method is specified when creating shipment schedules. |
| delivery method type | In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components. |
| detailed business process | A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management. |
| dimension | In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager. |
| directory information tree | In PeopleSoft Enterprise Directory Interface, the representation of a directory's hierarchical structure. |

| | |
|----------------------------------|---|
| division | In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it. See also <i>population</i> and <i>cohort</i> . |
| document sequencing | A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity. |
| dynamic detail tree | A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user. |
| edit table | A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft Enterprise application, they can be validated against an edit table to ensure data integrity throughout the system. |
| effective date | A method of dating information in PeopleSoft Enterprise applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date. |
| EIM ledger | Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result. |
| elimination set | In PeopleSoft Enterprise General Ledger, a related group of intercompany accounts that is processed during consolidations. |
| entry event | In PeopleSoft Enterprise General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries. |
| equitization | In PeopleSoft Enterprise General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations. |
| equity item limit | In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally. |
| event | A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Enterprise Human Resources, also refers to an incident that affects benefits eligibility. |
| event propagation process | In PeopleSoft Enterprise Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects. PeopleSoft Enterprise Enterprise Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit. |
| exception | In PeopleSoft Enterprise Receivables, an item that either is a deduction or is in dispute. |

| | |
|-----------------------------|--|
| exclusive pricing | In PeopleSoft Enterprise Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions. |
| fact | In PeopleSoft Enterprise applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table. |
| financial aid term | In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career. |
| forecast item | A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage. |
| fund | In PeopleSoft Enterprise Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual. |
| gap | In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded. |
| generic process type | In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report. |
| gift table | In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Enterprise Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal. |
| GL business unit | Abbreviation for <i>general ledger business unit</i> . A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also <i>business unit</i> . |
| GL entry template | Abbreviation for <i>general ledger entry template</i> . In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash. |
| GL Interface process | Abbreviation for <i>General Ledger Interface process</i> . In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run. |
| group | In PeopleSoft Enterprise Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Enterprise Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to |

| | |
|--------------------------|---|
| | run calculations in PeopleSoft business processes. In PeopleSoft Enterprise Time and Labor, for example, employees are placed in groups for time reporting purposes. |
| incentive object | In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, and user interaction objects. |
| incentive rule | In PeopleSoft Enterprise Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation. |
| incur | In PeopleSoft Enterprise Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities. |
| initiative | In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives. |
| inquiry access | In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data. See also <i>update access</i> . |
| institution | In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes. |
| integration | A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft Enterprise applications to work seamlessly with other PeopleSoft Enterprise applications or with third-party systems or software. |
| integration point | An interface that a system uses to communicate with another PeopleSoft Enterprise application or an external application. |
| integration set | A logical grouping of integrations that applications use for the same business purpose. For example, the integration set <code>ADVANCED_SHIPPING_ORDER</code> contains all of the integrations that notify a customer that an order has shipped. |
| item | In PeopleSoft Enterprise Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Enterprise Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Enterprise Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment. |
| item shuffle | In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment. |

| | |
|-----------------------------|---|
| joint communication | In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database. |
| keyword | In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Enterprise Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box. |
| KPI | An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined. |
| LDIF file | Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft Enterprise data and directory data. |
| learner group | In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office. |
| learning components | In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity. |
| learning environment | In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them. |
| learning history | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs. |
| ledger mapping | You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table. |
| library section | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it. |
| linked section | In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section. |
| linked variable | In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable. |
| LMS | Abbreviation for <i>learning management system</i> . In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Enterprise Student Records feature that provides a |

common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.

| | |
|-------------------------------|---|
| load | In PeopleSoft Enterprise Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Enterprise Inventory that is used to track the weight, the volume, and the destination of a shipment. |
| local functionality | In PeopleSoft Enterprise HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu. |
| location | Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address. |
| logistical task | In PeopleSoft Enterprise Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider. |
| market template | In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category. |
| mass change | In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution. See also <i>3C engine</i> . |
| match group | In PeopleSoft Enterprise Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values. |
| MCF server | Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration. |
| merchandising activity | In PeopleSoft Enterprise Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic. |
| meta-SQL | Meta-SQL constructs expand into platform-specific SQL substrings. They are used in functions that pass SQL strings, such as in SQL objects, the <i>SQLExec</i> function, and PeopleSoft Application Engine programs. |
| metastring | Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform. |
| multibook | In PeopleSoft Enterprise General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single |

| | |
|--|---|
| | transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers). |
| multicurrency | The ability to process transactions in a currency other than the business unit's base currency. |
| national allowance | In PeopleSoft Enterprise Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount. |
| need | In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package is based on the amount of financial need. The process of determining a student's need is called <i>need analysis</i> . |
| node-oriented tree | A tree that is based on a detail structure, but the detail values are not used. |
| pagelet | Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft Enterprise and non-PeopleSoft Enterprise content. |
| participant | In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process. |
| participant object | Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> . |
| partner | A company that supplies products or services that are resold or purchased by the enterprise. |
| pay cycle | In PeopleSoft Enterprise Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation. |
| payment shuffle | In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed. |
| pending item | In PeopleSoft Enterprise Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted. |
| PeopleCode | PeopleCode is a proprietary language, executed by the PeopleSoft Enterprise component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft Enterprise applications wherever PeopleCode can be executed. |
| PeopleCode event | See <i>event</i> . |
| PeopleSoft Pure Internet Architecture | The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser. |
| performance measurement | In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting. |
| period context | In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates |

a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

| | |
|-----------------------------|--|
| person of interest | A person about whom the organization maintains information but who is not part of the workforce. |
| personal portfolio | In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information. |
| plan | In PeopleSoft Enterprise Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions. |
| plan context | In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them. |
| plan template | In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition. |
| planned learning | In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs. |
| planning instance | In PeopleSoft Enterprise Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan. |
| population | In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also <i>division</i> and <i>cohort</i> . |
| portal registry | In PeopleSoft Enterprise applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references. |
| price list | In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges. |
| price rule | In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met. |
| price rule condition | In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction. |
| price rule key | In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule. |

| | |
|----------------------------|---|
| primacy number | In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence. |
| primary name type | In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides. |
| process category | In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization. |
| process group | In PeopleSoft Enterprise Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page. |
| process definition | Process definitions define each run request. |
| process instance | A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run. |
| process job | You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request. |
| process request | A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler. |
| process run control | A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request. |
| product | A PeopleSoft Enterprise or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products appear with the product name and release number. |
| product category | In PeopleSoft Enterprise Incentive Management, indicates an application in the PeopleSoft Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category. |
| product family | A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are Oracle's PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified partners. |
| product line | The name of a PeopleSoft Enterprise product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line. |
| programs | In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications. |

| | |
|-------------------------------|--|
| progress log | In PeopleSoft Enterprise Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project. |
| project transaction | In PeopleSoft Enterprise Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row. |
| promotion | In PeopleSoft Enterprise Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume. |
| prospects | In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution. In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution. |
| publishing | In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants. |
| rating components | In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations. |
| record group | A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views. |
| record input VAT flag | Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Enterprise Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Enterprise Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Enterprise Expenses, where it is assumed that you are always recording only input VAT. |
| record output VAT flag | Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> . |
| recname | The name of a record that is used to determine the associated field to match a value or set of values. |
| recognition | In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit. |
| reference data | In PeopleSoft Enterprise Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, and channels. |
| reference object | In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree). |

| | |
|--------------------------------|--|
| reference transaction | In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition. |
| regional sourcing | In PeopleSoft Enterprise Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location. |
| relationship object | In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects. |
| remote data source data | Data that is extracted from a separate database and migrated into the local database. |
| REN server | Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework. |
| requester | In PeopleSoft Enterprise eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders. |
| reversal indicator | In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds. |
| role | Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity. |
| role user | A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs. |
| roll up | In a tree, to roll up is to total sums based on the information hierarchy. |
| run control | A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data. |
| run control ID | A unique ID to associate each user with his or her own run control table entries. |
| run-level context | In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context. |
| SCP SCBM XML message | Abbreviation for <i>Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message</i> . Supply Chain Business Modeler uses XML as the format for all data that it imports and exports. |
| search query | You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents. |
| search/match | In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database. |

| | |
|--------------------------------|---|
| seasonal address | In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted. |
| section | In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections. |
| security event | In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries. |
| serial genealogy | In PeopleSoft Enterprise Manufacturing, the ability to track the composition of a specific, serial-controlled item. |
| serial in production | In PeopleSoft Enterprise Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record. |
| service impact | In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes. |
| service indicator | In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students. |
| session | <p>In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Enterprise Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.</p> <p>In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.</p> |
| session template | In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern. |
| setup relationship | In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node. |
| share driver expression | In PeopleSoft Enterprise Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse. |
| single signon | With single signon, users can, after being authenticated by a PeopleSoft Enterprise application server, access a second PeopleSoft Enterprise application server without entering a user ID or password. |

| | |
|------------------------------|--|
| source key process | In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges. |
| source transaction | In commitment control, any transaction generated in a PeopleSoft Enterprise or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction. |
| speed key | See <i>communication key</i> . |
| SpeedChart | A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition. |
| SpeedType | A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together. |
| staging | A method of consolidating selected partner offerings with the offerings from the enterprise's other partners. |
| standard letter code | In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification. |
| statutory account | Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft Enterprise, this is equivalent to the Alternate Account (ALTACCT) ChartField. |
| step | In PeopleSoft Enterprise Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run. |
| storage level | In PeopleSoft Enterprise Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels. |
| subcustomer qualifier | A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles. |
| Summary ChartField | You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters). |
| summary ledger | An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting. |
| summary time period | In PeopleSoft Enterprise Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total. |
| summary tree | A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built. |
| syndicate | To distribute a production version of the enterprise catalog to partners. |

| | |
|-------------------------|---|
| system function | In PeopleSoft Enterprise Receivables, an activity that defines how the system generates accounting entries for the general ledger. |
| system source | <p>The system source identifies the source of a transaction row in the database. For example, a transaction that originates in PeopleSoft Enterprise Expenses contains a system source code of BEX (Expenses Batch).</p> <p>When PeopleSoft Enterprise Project Costing prices the source transaction row for billing, the system creates a new row with a system source code of PRP (Project Costing pricing), which represents the system source of the new row. System source codes can identify sources that are internal or external to the PeopleSoft Enterprise system. For example, processes that import data from Microsoft Project into PeopleSoft Enterprise applications create transaction rows with a source code of MSP (Microsoft Project).</p> |
| TableSet | A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same. |
| TableSet sharing | Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier. |
| target currency | The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes. |
| tax authority | In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact. |
| template | A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft Enterprise, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft Enterprise portal, all templates must be registered in the portal registry, and each content reference must be assigned a template. |
| territory | In PeopleSoft Enterprise Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants. |
| third party | A company or vendor that has extensive PeopleSoft Enterprise product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft Enterprise applications. |
| 3C engine | Abbreviation for <i>Communications, Checklists, and Comments engine</i> . In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes. |
| 3C group | Abbreviation for <i>Communications, Checklists, and Comments group</i> . In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate. |
| TimeSpan | A relative period, such as year-to-date or current period, that can be used in various PeopleSoft Enterprise General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Enterprise Projects. |

| | |
|------------------------------------|---|
| trace usage | In PeopleSoft Enterprise Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record. |
| transaction allocation | In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables. |
| transaction state | In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing. |
| Translate table | A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own. |
| tree | The graphical hierarchy in PeopleSoft Enterprise systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies. |
| tuition lock | In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or <i>locked</i>) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge. |
| unclaimed transaction | In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator. |
| universal navigation header | Every PeopleSoft Enterprise portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user. |
| update access | In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data. See also <i>inquiry access</i> . |
| user interaction object | In PeopleSoft Enterprise Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All PeopleSoft Enterprise Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups). |
| variable | In PeopleSoft Enterprise Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section. |
| VAT exception | Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension. |
| VAT exempt | Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery. |

| | |
|---------------------------|---|
| VAT exoneration | Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization. |
| VAT suspension | Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT. |
| warehouse | A PeopleSoft Enterprise data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions. |
| work order | In PeopleSoft Enterprise Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order. |
| worker | A person who is part of the workforce; an employee or a contingent worker. |
| workset | A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page. |
| worksheet | A way of presenting data through a PeopleSoft Enterprise Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information. |
| worklist | The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item. |
| XML link | The XML Linking language enables you to insert elements into XML documents to create a links between resources. |
| XML schema | An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks. |
| XPI | Abbreviation for <i>eXtended Process Integrator</i> . PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with JD Edwards EnterpriseOne applications. |
| yield by operation | In PeopleSoft Enterprise Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis. |
| zero-rated VAT | Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery. |

Index

A

additional documentation x
application fundamentals ix

B

bursting 22, 24
 search keys 25
 template assignment 24
 using PeopleCode 45

C

comments, submitting xiv
common elements xiv
configuring XML Publisher 2
contact information xiv
creating templates 3
cross-references xiii
Customer Connection website x

D

data sources
 registering 2
 registration 26
 related files 28
data tags 54
documentation
 printed x
 related x
 updates x

F

files
 mapping PDF template files 19
 translatable 34
 translations 35

G

glossary 57

I

images
 importing 52
 inserting 51
 referencing 52

implementing XML Publisher 2
importing images 52
inserting images 51

M

mapping PDF template files 19

N

notes xiii

O

output formats 21

P

pages used
 associate templates 14
 bursting 14
 data source registration 26
 Design Helper 9
 output 14
 Query Report Scheduler 36
 Query Report Viewer 36
 Report Category 9
 Report Definition 14
 security 14
 sub-templates 29
 template translations 32
 XML Publisher report scheduler 36
PDF template files 19
PDF templates
 creating 53
 mapping data tags 54
 processing 53
 working with 53
PeopleBooks
 ordering x
PeopleCode
 bursting 45
 distributing reports 47
 for customizing report output 46
 for reports 43
 report parameters 45
 searching reports 47
 using with custom reports 44

PeopleCode, typographical
 conventions xii
 prerequisites ix
 printed documentation x
 printing reports 21

R

referencing images 52
 related documentation x
 related files 28
 report output
 customizing 46
 printing 21
 reports
 adding template files 18
 associating templates 17
 bursting options 22
 creating custom 43
 creating templates 49
 custom 44
 defining 3, 14
 distributing using PeopleCode 47
 locating 4
 output formats 21
 output options 19
 passing parameters 45
 printing 21
 properties 34
 running 3, 36, 45
 running in Query Report Viewer 36
 scheduling reports in Query Report
 Scheduler 37
 searching in repository 39
 searching using PeopleCode 47
 setting up categories 10
 viewing 4
 viewing with search keys 41
 RTF templates 49
 running reports 36

S

scheduling reports 37
 searching for reports 39
 security 24
 bursting 24
 defining 6
 setting 21
 sub-templates
 calling 51

creating 50
 importing 51
 maintaining 29
 properties 34
 understanding 29
 using 50
 suggestions, submitting xiv

T

template translations
 maintaining 33
 searching 32
 templates
 adding template files 18
 associating with a report 17
 bursting 24
 choosing for custom reports 44
 creating 49
 creating PDF 53
 creating RTF 49
 mapping PDF data tags 54
 mapping PDF files 19
 processing PDF 53
 properties 34
 RTF 49
 setting up 11
 sub-templates 29
 translations 31
 working with PDF 53
 terms 57
 translatable files 34
 translation files 35
 translation templates 31
 translations 31
 typographical conventions xii

V

visual cues xiii

W

warnings xiii

X

xdo.cfg file 9
 XML Publisher
 configuring 2
 custom reports 43
 defining reports 3
 global engine settings 9

- implementation 2
- running reports 3, 36
- security 6
- set up pages 9
- template design helpers 11

