
Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise

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Enterprise PeopleTools 8.49 PeopleBook: XML Publisher for PeopleSoft Enterprise
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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)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. 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

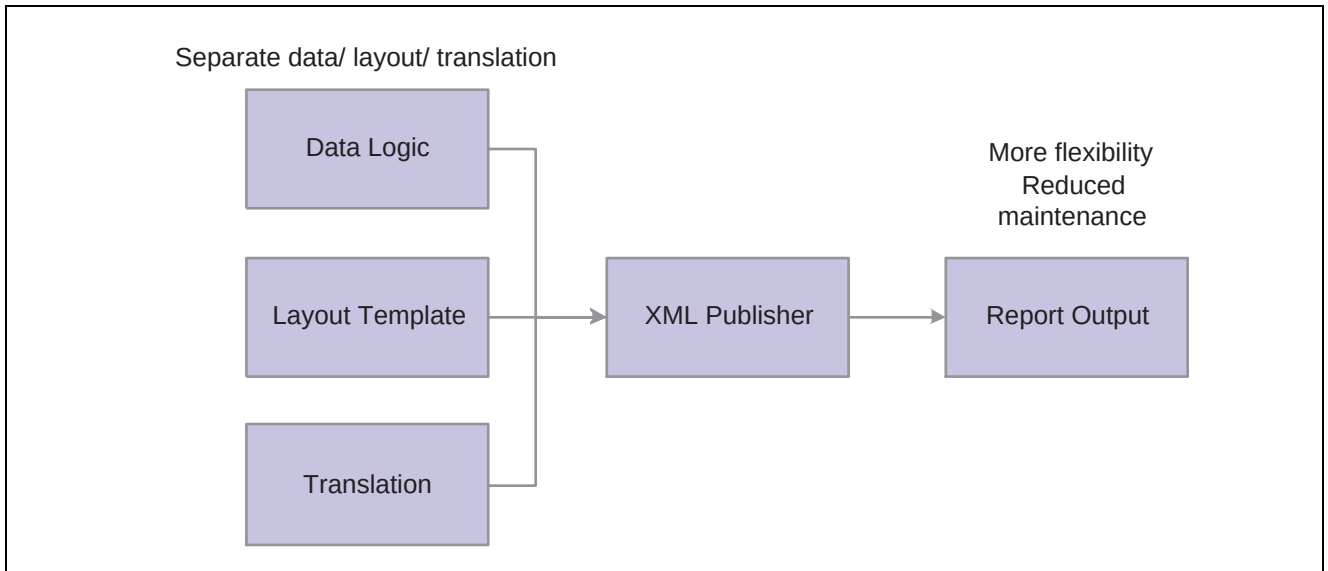
Getting Started with XML Publisher

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

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. PeopleSoft Query as well as any PeopleTools based applications providing XML data are available to XML Publisher as a data source. 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 and final xml data is passed to the core formatting engine to produce report output.

XML Publisher Phases

XML Publisher implementation can be divided into the following phases:

- Set up XML Publisher.
- Create and register data sources.
- Create and upload report templates.
- Define XML Publisher reports.
- Run, locate and view XML Publisher reports.

Set Up XML Publisher

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

Step	Reference
1. Define XML Publisher settings.	See Chapter 2, “Setting Up XML Publisher,” Defining XML Publisher Global Engine Settings, page 5.
2. Set up XML Publisher permission list security.	See Chapter 2, “Setting Up XML Publisher,” Assigning XMLP Permissions to Users, page 6.
3. Set up Report Manager.	See <i>Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler</i> , “Using Report Manager”.
4. Define report categories, including Report Definition Editor security.	See Chapter 2, “Setting Up XML Publisher,” Setting Up Report Categories, page 7.
5. Download design plug-ins to facilitate the offline template design activities.	See Chapter 2, “Setting Up XML Publisher,” Working with Template Design Helpers, page 8.

Create and Register Data Sources

To create and register data sources, perform the following steps:

Step	Reference
1. Identify or create the source of your report data. Data sources can be PS Query, Rowset PeopleCode object, XMLDoc object, or XML files.	See <i>Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Query</i> , “Creating and Running Simple Queries” and Chapter 3, “Creating and Registering Data Sources,” Creating Data Sources, page 11.
2. Register schema and sample data files for XML Publisher data sources. For PS Query you can automatically generate schema file and sample data.	See Chapter 3, “Creating and Registering Data Sources,” Registering Data Sources, page 14.

Create and Upload Report Templates

To create and upload templates, perform the following steps:

Step	Reference
1. Create and upload schema and sample data.	See Chapter 3, “Creating and Registering Data Sources,” Creating Data Sources, page 11.
2. Download schema and sample data from the appropriate data source to facilitate template design.	See Chapter 5, “Defining Report Definitions,” Defining Reports, page 30.
3. Use either Microsoft Word and Adobe Acrobat to develop and maintain custom report formats.	See Chapter 4, “Creating Report Templates,” Selecting Report Template Type, page 19.
4. (Optional) Create and maintain reusable sub-template definitions.	See Chapter 5, “Defining Report Definitions,” Using the Content Library to Maintain Sub-templates, page 42.
5. (Optional) Register translation XLIFF files for report templates and Content Library sub-templates.	See Chapter 5, “Defining Report Definitions,” Maintaining Template Translations, page 44.

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 5, “Defining Report Definitions,” Defining Reports, page 30.

Run, Locate and View XML Publisher Reports

XML Publisher reports can be run online or in batch through the Process Scheduler. For query-based reports, pages are available for running the reports both online and in batch. To run XML Publisher reports, perform the following steps:

Step	Reference
1. Schedule Query-based XML Publisher reports.	See Chapter 6, “ Running, Locating and Viewing XML Publisher Reports ,” Scheduling Reports in Query Report Scheduler , page 53.
2. Schedule other XML Publisher reports. Note. You will need to create an application engine program using XMLP PeopleCode APIs.	See Chapter 6, “ Running, Locating and Viewing XML Publisher Reports ,” Running Report Using PeopleCode , page 57.
3. View Query-based XML Publisher reports online real-time.	See Chapter 6, “ Running, Locating and Viewing XML Publisher Reports ,” Running Reports in Query Report Viewer , page 52.
4. View other XML Publisher reports online real-time.	See Chapter 6, “ Running, Locating and Viewing XML Publisher Reports ,” Running Report Using PeopleCode , page 57.
5. Locate XML Publisher reports using enhanced search criteria.	See Chapter 6, “ Running, Locating and Viewing XML Publisher Reports ,” Searching the XML Publisher Report Repository , page 60 and <i>Enterprise PeopleTools 8.49 PeopleBook: PeopleCode API Reference</i> , “XML Publisher Classes,” Search Operator Values.
6. View XML Publisher reports in the Report Manager.	See <i>Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler</i> , “Using Report Manager,” Viewing Reports.

CHAPTER 2

Setting Up XML Publisher

This chapter discusses how to:

- Prepare to use XML Publisher.
- Set Up XML Publisher.

Preparing to use XML Publisher

This section discusses how to:

- Define XML Publisher global engine settings.
- Assign users to XMLP roles.

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>

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

Note. By default, `system-temp-dir` property is set to `CACHE` directory, this is relative to the active running domain. That means runtime XMLP processes will use `[PS_HOME]/appserv/[domain]/CACHE` directory and batch XMLP processes running under process scheduler will use `[PS_HOME]/appserv/PRCS/[domain]/CACHE` directory when creating temporary files. This `CACHE` directory is shared by all running PeopleTools processes and it set through `CacheBaseDir` setting in `psappsrv.cfg` or `psprcs.cfg` configuration files. If you change `CacheBaseDir`, you will need to change `system-temp-dir` to point to another valid directory. Note that temporary files created in that directory could grow very large in size depending on the size of your reports so you need to choose your "system-temp-dir" for optimum system performance.

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=%PS_HOME%/appserv/xdo.cfg
```

New line in `psappsrv.cfg`:

```
JavaVM Options=-Xrs -Dxdo.ConfigFile==%PS_HOME%/appserv/P8488041/xdo.cfg
```

where `P8488041` is the Application Server domain name.

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*.

Assigning XMLP Permissions to Users

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
Query Report Viewer	Yes	Yes	No
Query Report Scheduler	Yes	Yes	No
Report Repository	Yes	Yes	Yes

Setting Up XML Publisher

This section discusses how to:

- Set up report categories.
- Download 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	PSXPSETUPDWNLD	Reporting Tools, XML Publisher, Setup, Design Helper	Download plug-ins to facilitate offline template design.

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.

Select Reporting Tools, XML Publisher, Setup, Report Category.

Report Category

Report Category ID: ALLUSER

Properties

Description: All PeopleSoft User

***Object Owner ID:** PeopleTools

Report Definition Editors and Viewers				View All	First	1 of 1	Last
*ID Type	*Security ID	Description	Read Only				
Role	PeopleSoft User	PeopleSoft User	☐				

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.

There are two template design helpers available one for designing RTF Reports (MS Word Template Builder) and the second for PDF template which gets embedded as a JavaScript inside the pdf template itself upon uploading to PeopleTools.

Select Reporting Tools, XML Publisher, Setup, Design Helper.

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.

See Chapter 4, “Creating Report Templates,” Using PDF Templates, page 25.

CHAPTER 3

Creating and Registering Data Sources

This chapter discusses how to:

- Create data sources.
- Register data sources.

Creating Data Sources

This section provides an overview of data generation and creating schema and sample data.

Understanding Data Generation

In XML Publisher, the data extraction is separate for the data presentation. Sample data can be used to design your RTF template. Data schema is important for defining the bursting feature and helpful when designing RTF templates. If PeopleSoft queries are used for data extraction, the system will generate the schema, for all other data sources, you must create the data schema using tools outside of the PeopleSoft system.

XMLP can register PS/Query, Rowset object, XMLDoc object and XML file as a data source, but XML data can be generated using any means including PS/Query, SQR, Application Engine, PeopleCode, FileLayout and so forth. If you are not using PS/Query, Rowset or XMLDoc, you can use XML File as a data source for all other means of data generation. Internally all data source types will be converted to xml files before passing them to the core formatting engine.

Considerations for data generation include:

- XML file is the preferred data source type for large reports such as Paychecks. Rowsets and XMLDoc data sources have performance/memory limitations, use them only on small reports.
- For a large data source, consider defining bursting fields in your XML data so they can be used at runtime to split report processing; this will reduce memory usage and improve performance for large data files (*burst by field* tag must be from a second level repeating group (node) in the XML schema).
- For RTF template based reports, design your data source xml structure to be as close as possible to the actual report template structure; this will improve runtime performance by preventing unnecessary grouping by the formatting engine.

Note. For improved performance, Rowset and XMLDoc data sources should only be used for small low volume reports; moderate to large reports should use XML files as their data sources.

Creating Schema and Sample Data

Since the data source can be any xml data source, you will need to create the data schema to describe the xml data source. Sample data source information needs to be created to assist you in developing your report templates.

Storing the sample data file in PeopleTools provides a means to:

- Perform iterative template development.
- Preview the template.

XML Publisher expects XML data file to consist of a root node with a set of related elements below. This is a sample XML File used as a data source:

```
Sample XML <?xml version="1.0" encoding="UTF-8"?>
<root>
  <taxroot>
    <Box_Year>2005</Box_Year>
    <Box_Form>W2</Box_Form>
    <EE_SSN>111-11-1111</EE_SSN>
    <ER_EIN>ER_11111111</ER_EIN>
    <Employee>
      <EE_FirstName>Incheol</EE_FirstName>
      <EE_LastName>Kang</EE_LastName>
      <EE_Address1>500 Oracle Parkway</EE_Address1>
      <EE_Address2>Redwood Shores</EE_Address2>
      <EE_Address3>CA 94065</EE_Address3>
    </Employee>
    <Employer>
      <ER_Name>Oracle USA</ER_Name>
      <ER_Address1>500 Oracle Parkway</ER_Address1>
      <ER_Address2>Redwood Shores</ER_Address2>
      <ER_Address3>CA 94065</ER_Address3>
    </Employer>
    <Tax>
      <Fed_Wages_COR>20000</Fed_Wages_COR>
      <Fed_Tax_COR>20000</Fed_Tax_COR>
      <RETIRE_EE_PRV>Y</RETIRE_EE_PRV>
    </Tax>
  </taxroot>
  <taxroot>
    <Box_Year>2005</Box_Year>
    <Box_Form>W2</Box_Form>
    <EE_SSN>2222-22-2222</EE_SSN>
    <ER_EIN>ER_22222222</ER_EIN>
    <Employee>
      <EE_FirstName>Chang</EE_FirstName>
      <EE_LastName>Yu</EE_LastName>
      <EE_Address1>500 Oracle Parkway</EE_Address1>
      <EE_Address2>Redwood Shores</EE_Address2>
      <EE_Address3>CA 94065</EE_Address3>
    </Employee>
```

```

    <Employer>
      <ER_Name>Oracle USA</ER_Name>
      <ER_Address1>500 Oracle Parkway</ER_Address1>
      <ER_Address2>Redwood Shores</ER_Address2>
      <ER_Address3>CA 94065</ER_Address3>
    </Employer>
    <Tax>
      <Fed_Wages_COR>10000</Fed_Wages_COR>
      <Fed_Tax_COR>10000</Fed_Tax_COR>
      <RETIRE_EE_PRV>Y</RETIRE_EE_PRV>
    </Tax>
  </taxroot>
</root>

```

This is the sample schema for the xml file above:

```

<?xml version="1.0"?>
<xs:schema id="root" targetNamespace="http://tempuri.org/example_xml.xsd" xmlns:⇒
mstns="http://tempuri.org/example_xml.xsd" xmlns="http://tempuri.org/example_⇒
xml.xsd" xmlns:xs="http://www.w3.org/2001/XMLSchema" xmlns:msdata="urn:schemas-⇒
microsoft-com:xml-msdata" attributeFormDefault="qualified" elementFormDefault="⇒
"qualified">
  <xs:element name="root" msdata:IsDataSet="true" msdata:EnforceConstraints="⇒
"False">
    <xs:complexType>
      <xs:choice maxOccurs="unbounded">
        <xs:element name="taxroot">
          <xs:complexType>
            <xs:sequence>
              <xs:element name="Box_Year" type="xs:string" minOccurs="0" />
              <xs:element name="Box_Form" type="xs:string" minOccurs="0" />
              <xs:element name="EE_SSN" type="xs:string" minOccurs="0" />
              <xs:element name="ER_EIN" type="xs:string" minOccurs="0" />
              <xs:element name="Employee" minOccurs="0" maxOccurs="unbounded">
                <xs:complexType>
                  <xs:sequence>
                    <xs:element name="EE_FirstName" type="xs:string" minOccurs="0" ⇒
/>
                    <xs:element name="EE_LastName" type="xs:string" minOccurs="0" ⇒
/>
                    <xs:element name="EE_Address1" type="xs:string" minOccurs="0" ⇒
/>
                    <xs:element name="EE_Address2" type="xs:string" minOccurs="0" ⇒
/>
                    <xs:element name="EE_Address3" type="xs:string" minOccurs="0" ⇒
/>
                  </xs:sequence>
                </xs:complexType>
              </xs:element>
            <xs:element name="Employer" minOccurs="0" maxOccurs="unbounded">

```

```

        <xs:complexType>
          <xs:sequence>
            <xs:element name="ER_Name" type="xs:string" minOccurs="0" />
            <xs:element name="ER_Address1" type="xs:string" minOccurs="0" =>
/>
            <xs:element name="ER_Address2" type="xs:string" minOccurs="0" =>
/>
            <xs:element name="ER_Address3" type="xs:string" minOccurs="0" =>
/>
          </xs:sequence>
        </xs:complexType>
      </xs:element>
      <xs:element name="Tax" minOccurs="0" maxOccurs="unbounded">
        <xs:complexType>
          <xs:sequence>
            <xs:element name="Fed_Wages_COR" type="xs:string" minOccurs=>
"0" />
            <xs:element name="Fed_Tax_COR" type="xs:string" minOccurs="0" =>
/>
            <xs:element name="RETIRE_EE_PRV" type="xs:string" minOccurs=>
"0" />
          </xs:sequence>
        </xs:complexType>
      </xs:element>
    </xs:sequence>
  </xs:complexType>
</xs:element>
</xs:choice>
</xs:complexType>
</xs:element>
</xs:schema>

```

Note. Schema and sample data are generated for PeopleSoft Query data source.

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 source may be PeopleSoft Query, Rowset object, XMLDoc object , or XML files.

Benefits of data source registration include:

1. Previously registered data sources can be reused with multiple report definitions.
2. 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 5, "Defining Report Definitions," Setting Bursting Options, page 38.](#)

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: Window listing query ☒ **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 *PSQuery*, *Rowset*, *XML Doc*, or *XML File*.

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 mapping 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.

CHAPTER 4

Creating Report Templates

This chapter discusses how to:

- Select report template type.
- Use RTF templates.
- Use PDF templates.

See Also

Oracle XML Publisher Core Components Guide.

Enterprise PeopleTools 8.49 PeopleBook: PeopleCode API Reference, “XML Publisher Classes”

Selecting Report Template Type

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 section provides an overview of report templates and discusses considerations for templates.

Understanding Report Templates

The nature of the data plays a role in the selection of a template.

Note. Internet Explorer does not have native support for svg graphics, a SVGViewer must be installed in order to see charts in Internet Explorer. SVGViewer is available for free download on Adobe web site - <http://www.adobe.com/svg/viewer/install/> .

There are different considerations when it comes to choosing template types for your reports, below is a list of supported template types along with descriptions and guidelines:

Template Type	Description
PDF Template	Reports are pre-rendered PDF forms that are simply filled with data at runtime. The mapping between xml data source elements and PDF form fields is implemented using a simple algorithm that does not support nested structures such as multi-value fields. This limitation is mainly because of the static nature of PDF forms. Suitable when you have existing PDF forms that you need to use to generate reports, such as government forms. Generally faster than RTF templates since there is no runtime rendering involved. All element names in the schema must be unique, since there will be one-to-one mapping between xml elements and PDF form fields. The low level repeated elements should be a single element (not siblings). For example: <pre>AllPaychecks -> EmplID, Earnings, Taxes, Benefits</pre> In this example, EmplID, Earnings, Taxes and Benefits (the low level elements) are siblings. The PDF processor will not be able to produce a report that has low level sibling elements. To correct this situation, the User could modify the schema to combine the siblings into a compound type like Paycheck, which would be the child of AllPaychecks. The resulting structure will look like: <pre>AllPaychecks -> Paycheck (EmplID, Earnings, => Taxes, Benefits)</pre> Use PDF templates when: • You already have PDF templates that you must use (e.g. government forms). • You have simple form-based reporting requirements with no complex formatting (i.e. no charting, dynamic tables, dynamic repeated fields and so forth).

Template Type	Description
RTF Template	RTF engine is the core of XMLP, it is based on the W3C XSL-FO standard and it is the fastest, most scalable implementation in the world today. Reports are fully rendered reports, which means, the actual PDF output is generated at runtime using XSLFO technology. Report designers have full control on output formatting and can incorporate charts, dynamic tables, conditional formatting and so forth. Reports are generally slower than PDF based reports since they involve real-time output rendering. For bursting, XML schema should have a single repeated element (paycheck, emplId, an so forth) on a second level (child of the root element).
eText	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 (EFT) or Electronic Data Interchange (EDI). Because the output is intended for electronic communication, these templates must follow specific format instructions for data placement. See <i>Oracle XML Publisher Core Components Guide, eText Templates</i>.
XSL Templates	For more complex design requirements, a number of XSL and XSL-FO elements are supported for use with your XSL templates. See <i>Oracle XML Publisher Core Components Guide, XSL, SQL, and XSL-FO Support</i>.

Note. Sample report templates are bundled with the XML Publisher Desktop, and available in <Installation Directory>\XML Publisher Desktop\samples.

Using 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.
- Change default template font.

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, XML Publisher Template Builder plug-in, was installed.

Sample report templates are available in <Installation Directory>\XML Publisher Desktop\samples.

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.

Note. Your data source xml structure should be designed to be as close as possible to the actual report template structure; this will improve runtime performance by preventing unnecessary XSL transformation. This is particularly applicable for reports with complex data structures and very large file sizes.

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

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

See [Chapter 2, “Setting Up XML Publisher,” Working with Template Design Helpers, page 8](#) and [Chapter 5, “Defining Report Definitions,” Creating Report Definitions, page 29](#).

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 5, “Defining Report Definitions,” Using the Content Library to Maintain Sub-templates, page 42](#).

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, for example: `<?import:psxmlp://STDHEADER?>`. This syntax must be in Normal text.

Note. The sub-template reference is only defined in the RTF template. The sub-template must be defined in Content Library, however the relationship to templates using the sub-template is not defined in the database. Developers must be aware of the sub-template relationships when modifying the RTF sub-template.

See [Chapter 5, “Defining Report Definitions,” Using the Content Library to Maintain Sub-templates, page 42](#).

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 6, “Running, Locating and Viewing XML Publisher Reports,” Running XML Publisher PeopleSoft Query Reports, page 51.](#)

Testing Sub-template in Microsoft Word

You should test your template and sub-template using Template Builder before uploading to PeopleTools, to make your sub-template is accessible to your template on the file system.

Use the following syntax when importing:

```
<?import:file:C:///Template_Directory/subtemplate_file.rtf?>
```

Notice the triple slashes and the use of the actual file name instead of template ID.

When your design is complete, you can change the import statement back to make the sub-template available to the main template in PeopleTools environment:

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 [Chapter 4, “Creating Report Templates,” Incorporating Sub-templates, page 22](#).

Changing Default Template Font

The output report from RTF template uses template level default fonts for empty report spaces and empty table cells. If default font size does not match font height used in a template, a final report could look different from user expectations. In this case the user can change template default font either in design time or runtime:

- Design time

Set the xdo.cfg for the font, for example set default font for a specific report to be Helvetica, size is 8:

```
<property name="rtf-output-default-font">Helvetica:8</property>
```

- Runtime

Use PeopleCode to set the font. for example set default font for a specific report to be Times New Roman with height 10 :

```
Local PSXP_ENGINE:FOPProcessor  &oFOPProcessor = create PSXP_ENGINE:FOPProcessor();
```

```
&oFOPProcessor.ConfProp = create PSXP_ENGINE:Properties();
```

```
If Not &oFOPProcessor.ConfProp.setProperty("rtf-output-default-font", "Times New⇒
Roman:10") Then
```

```
    Return False;
```

```
End-If;
```

Using PDF Templates

This section discusses:

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

See [Chapter 5, “Defining Report Definitions,” Associating Templates, page 33](#).

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 with the letter *m* added at the end of the file, for example if the original file is *template.pdf*, the mapped file will be *templatem.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. If the PDF template's field names are 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.

This is an example:

The screenshot displays the Adobe Acrobat Professional interface with a T4 form titled "STATEMENT OF REMUNERATION PAID / ÉTAT DE LA RÉMUNÉRATION PAYÉE". The form includes various fields for personal and employment information, such as "Employer's name", "Year", "Province of employment", and "Employee's CPP contributions". A dark blue outline highlights the mapped form fields. A pop-up dialog box titled "Fields" is open, showing a list of mapped fields including "CAN_YearEnd", "T4_Data", "Amend_Cancel", "BATCH_ID", "BN", "BURST_VALUE", "CPP_Exempt", "CPP_QPP_earnings", "CHIRID", "DUP_Copy", and "EE_Address1". The "Select" button is highlighted. The form also includes sections for "Other information (see the back)" and "Autres renseignements (voir au verso)".

Sample PDF file mapping

CHAPTER 5

Defining Report Definitions

This chapter discusses how to:

- Create report definitions.
- 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:	Cross Reference Window Listing				
*Report Status:	Active				
*Report Category ID:	ALLUSER All PeopleSoft User				
Object Owner ID:	PeopleTools				
Template Type:	☐ PDF ☒ RTF ☐ eText ☐ XSL				
Days Before Purge:					
Registered Date/Time:	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.

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	This is a read-only field that reflects the value that was entered when the data source was registered. For unregistered query data sources, this field reflects the query description.
Report Description	(Optional) Enter descriptive text that provides more detail about the report. If left blank, the report name appears by default.
Report Status	Select <i>Active</i>, <i>In Progress</i>, or <i>Inactive</i>. 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.
Report Category ID	Select a report category ID. 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. See Chapter 2, “Setting Up XML Publisher,” Setting Up Report Categories, page 7.
Object Owner ID	(Optional) Indicate which product, feature, or application owns this report. Note. The default value that appears here is based on the Object Owner ID set in the Report Category component.
Template Type	Select <i>PDF</i>, <i>RTF</i>, <i>eText</i>, or <i>XSL</i>. Only one template type is allowed per report. The type cannot be altered once the first template file has been uploaded and saved. 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
Days Before Purge	(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. 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. Only XML Publisher report developers with permission list PTPT2600 can set this value. See <i>Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler</i>, “Using Report Manager,” Maintaining Reports.
Registered Date/Time	This is a read-only field maintained by the system that indicates the date that the initial report definition was registered.
Updated Date/Time	This is a read-only field maintained by the system that indicates the date that the last update to the report definition was made.
Registered By	This is a read-only field maintained by the system that indicates the user ID of the operator who initially registered the report definition.

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.

Associating Templates

Access the Template page.

The screenshot shows the 'Template' tab selected in a web application. The 'Report Name' is 'T4NBR3'. Under the 'Template' section, the 'Template ID' is 'T4NBR3_1', 'Description' is empty, '*Language Code' is 'English', and 'Channel' is empty. The '*Default Template' checkbox is checked. Below this is the 'Template Files' section, which 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 another 'Upload'/'Download' pair.

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 8.49 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.

Note. The preview button uses the sample xml data file to generate report output, sometimes, if the sample data does not match the real data you may find discrepancies between preview and real report outputs. This is specifically true when the report template uses sample data in variables and conditional formatting.

See [Chapter 4, “Creating Report Templates,” Mapping Data Tags, page 27](#).

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.

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 [Chapter 4, “Creating Report Templates,” Mapping Data Tags, page 27](#).

Setting Output Options

Access the Output page.

Definition **Template** **Output** **Security** **Bursting**

Report Name: XRFWIN

General

☐ PDF report output may be edited

Runtime Output Format Options

Format Type	Enabled	Default
HTML	☒	☒
PDF	☒	☐
RTF	☒	☐
XLS	☒	☐

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 8.49 PeopleBook: PeopleCode API Reference*, “XML Publisher Classes”; *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests,” Scheduling Process Requests and [Chapter 6, “Running, Locating and Viewing XML Publisher Reports,” Customizing Printed Report Output, page 58.](#)

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.

Definition Template Output **Security** Bursting

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.

Note. This *burst by field* tag must be from the highest level repeating group (node) in the XML schema. For Bursting to work, there should be only one high level repeating group in the XML source.

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 5, "Defining Report Definitions," Maintaining Template Translations, page 44.

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 8.49 PeopleBook: PeopleCode API Reference*, “XML Publisher Classes,” SearchAttribute Class.

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.

Note. 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.

Page Used to Maintain Sub-templates

Page Name	Object Name	Navigation	Usage
Content Library	PSXPSTMTPLDEFN	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: Report Header

***Language:** English

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

Object Owner ID: PeopleTools

Sub-Template Type: RTF

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

Effective Date: 01/05/2006

***Status:** Active

Template File: Header_Std_Lower_simple.rtf Upload Download View

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. <u>See Chapter 2, "Setting Up XML Publisher," Setting Up Report Categories, page 7.</u>
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				
Customize Find View All				
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.

The Translated check box appears only when you have selected a value in the Target Language field. This check box, when selected, enables you to search for templates that have already been translated into the selected target language. If cleared, you are searching for templates that have not yet been translated into the target language.

3. Once your search results appear, select the effective date of the template for which you want to maintain translations.

Maintaining Template Translations

Access the Template Translations page.

Template Translations

Template ID: XRFWIN_1 **Effective Date:** 01/01/1900

Report Properties

Data Source Type: PS Query **Data Source ID:** XRFWIN
Report Name: XRFWIN **Description:** Window repo

Template Properties

Description:
Base Language: English **Channel:**
Template File: xrfwin.rtf
Status: Active [Download](#) [Preview](#) [Generate Translatable File](#)

Translation Files						
Active	XLIFF File	Language	Preview	Upload		
☒	xrfwin_esp.xlf	Spanish	Preview	Upload	+	-
☒	xrfwin_fra.xlf	French	Preview	Upload	+	-
☒	xrfwin_ger.xlf	German	Preview	Upload	+	-
☒	xrfwin_ja.xlf	Japanese	Preview	Upload	+	-
☒	xrfwin_kor.xlf	Korean	Preview	Upload	+	-
☒	xrfwin_zhs.xlf	SCinese	Preview	Upload	+	-

Template Translations page

Template ID/Sub-Template ID A read only field indicating the unique template ID or sub-template ID.

Effective Date A read only field that indicates the effective date as registered for the template under the Report Definition component or for the sub-template under the Content Library component.

Note. The translation inherits the same date and cannot be changed.

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

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 *In Progress*, *Active*, or *Inactive* 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 translated 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 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 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.

CHAPTER 6

Running, Locating and Viewing XML Publisher Reports

You can view and schedule query-based reports with XML Publisher. Custom reports as well as query-based reports can be run in batch through the Process Scheduler or online using PeopleCode APIs.

This chapter discusses how to:

- Run XML Publisher PeopleSoft Query reports.
- Run reports using PeopleCode.
- Run reports in Process Scheduler.
- Locate and view XML Publisher reports.

Running XML Publisher PeopleSoft Query Reports

You can view and schedule query-based reports with XML Publisher delivered PeopleSoft Internet Architecture pages.

This section discusses how to:

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

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	PSXPRPTMGR	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	MSGLIST_1	02/06/2006	HTM	N	View Report
XRFWIN	Cross Reference Window Listing	XRFWIN	XRFWIN_1	02/06/2006	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

A read-only field that indicates whether the report definition includes bursting instructions.

Burst reports are listed, but they aren't executable from the Query Report Viewer component.

Note. Burst reports must be run from the Query Report Scheduler component.

View Report

Click this link to view the report online. When they exist, the Query's runtime parameters are presented.

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.

Note. This link is disabled for burst reports.

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

Note. If an old query (created using Windows Query Manager) is used as your data source, you may receive an error message *Rowset Object cannot be empty* while running a report through Query Report Viewer or XML Publisher Report Scheduler. To correct this problem, resave the query in PeopleSoft Pure Internet Architecture which will update the metadata.

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_B_TEST2 t4 Burst tst for multi in file

Burst Field Name: MESSAGE_SET_NBR

Dynamic Template: Inactive Bursting Security: Inactive

Template ID: T4_B_TEST2_1 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 <i>Active</i> or <i>Inactive</i> depending on whether there is criteria to dynamically select the template and/or language based upon a data value set in the Templategroup box of the Report Definition, Bursting page. This field appears for bursted reports only.
Bursting Security	A read-only field that displays either <i>Active</i> or <i>Inactive</i> depending on whether there is criteria to assign unique bursting security set in the Burst Securitygroup 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 8.49 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 8.49 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 6, “Running, Locating and Viewing XML Publisher Reports,” Searching the XML Publisher Report Repository, page 60.](#)

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests”.

Running Reports in Process Scheduler

This section discusses how to:

- Use the Process Scheduler Request page.
- Create run control page.
- Create a process definition.
- 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*.

Creating Run Control Page

You will need to create a custom run page that contains the prompts required by your 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.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests,” Running Processes from PeopleSoft Applications.

Creating a Process Definition

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.

The XML Publisher report name, Process Scheduler process name, and the Application Engine process name are the same.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Defining PeopleSoft Process Scheduler Support Information,” Defining Process Definitions.

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.

Running Reports Using PeopleCode

This section provides an overview of PeopleCode XML Publisher classes and discusses how to:

- Run reports using PeopleCode.
- Choose a template.
- Pass parameters.
- Burst reports.
- Customize printed report output.
- Distribute reports.
- Search for reports.

Understanding PeopleCode XML Publisher Classes

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.

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.

You can call the PeopleCode from a page for online processing, or you can create an application engine program to run the report in batch.

See [Chapter 5, “Defining Report Definitions,” Creating Report Definitions, page 29](#).

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Application Engine*, “Creating Application Engine Programs”.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleCode API Reference*, “XML Publisher Classes”.

Running Report Using PeopleCode

The XML Publisher classes enable you to access the runtime portions of the XML publishing process programmatically, that is, after the templates and reports have been created. The XML Publisher classes are not built-in classes, like rowset, field, record, and so on. They are application classes. Before you can use these classes in your PeopleCode program, you must import them to your program.

Your import statements should look like the following:

```
import PSXP_RPTDEFNMANAGER:*
```

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleCode API Reference*, “XML Publisher Classes,” Report Manager Definition Classes Constructors.

Example: Publish a report based on PSQuery

This is a code snippet example for publishing a report based on PSQuery:

```
/* get report definition object */
&oRptDefn = create PSXP_RPTDEFNMANAGER:ReportDefn (&sRptDefn);
&oRptDefn.Get();
/* fill query runtime prompt record */
&rcdQryPrompts = %RptDefn.GetPSQueryPromptRecord();
If Not &rcdQryPrompts = Null Then
    &oRptDefn.SetPSQueryPromptRecord(&rcdQryPrompts);
End-If;
/*generate report*/
&oRptDefn.ProcessReport (&sTpltID, &sLangCd, &AsOfDate, &sOutFormat);
/*publish report */
&oRptDefn.Publish(&sPrsServerName,"",&sFolder, &prcsInstId;
```

Example: Print a report based on XMLFile

This is a code snippet example for printing a report based on XMLFile:

```
/* get report definition object */
&oRptDefn = create PSXP_RPTDEFNMANAGER:ReportDefn (&sRptDefn);
&oRptDefn.Get();
/* pass XMLFile to the report definition */
&oRptDefn.SetRuntimeDataXMLFile(&sXMLFilePath);
/*generate report*/
&oRptDefn.ProcessReport (&sTpltID, &sLangCd, &AsOfDate, &sOutFormat);
/*publish report */
&oRptDefn.PrintOutput (&sDestinationPath);
```

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.

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 5, "Defining Report Definitions," Setting Bursting Options, page 38.](#)

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 `psxprint.bat` on Microsoft Windows or `psxprint.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 `psxprint.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
%RPTOUTDIR%	Full path to the report output directory.
%REPORTFILE%	Full path to the report output file.
%DESTPRINTER%	Full path to the destination printer.

See [Chapter 5, “Defining Report Definitions,” Setting Output Options, page 35](#).

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 checkbox 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 5, “Defining Report Definitions,” Setting Bursting Options, page 38](#) and [Chapter 6, “Running, Locating and Viewing XML Publisher Reports,” Searching the XML Publisher Report Repository, page 60](#).

Locating and Viewing XML Publisher Reports

This section discusses how to:

- Search the XML Publisher Report Repository.
- View reports.

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**

☐ Case Sensitive

MENUNAME

Reports
[Customize](#) | [Find](#) | [View All](#) |

First 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 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Using Report Manager”.

Process Monitor

Click this link to go to the Process Monitor.

See *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, “Using Process Monitor”.

See *Enterprise PeopleTools 8.49 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 5, “Defining Report Definitions,” Setting Bursting Options, page 38.

APPENDIX A

Securing XML Publisher

This chapter discusses XML Publisher Security:

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 2, "Setting Up XML Publisher," Setting Up Report Categories, page 7; Chapter 5, "Defining Report Definitions," Creating Report Definitions, page 29; *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, "Submitting and Scheduling Process Requests," Scheduling Process Requests; *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Process Scheduler*, "Setting Up PeopleSoft Process Scheduler Security" and *Enterprise PeopleTools 8.49 PeopleBook: PeopleSoft Query*, "PeopleSoft Query Security".

APPENDIX B

Migrating XMLP Definitions

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.

XMLP Definition Types

The following definition types can be added to projects in Application Designer:

- XMLP Data Src Defn.
- XMLP File Defn.
- XMLP Report Defn.
- XMLP Template Defn.

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. 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.

See *Enterprise PeopleTools 8.49 PeopleBook: Global Technology*, “Working With PeopleSoft Applications in Multiple Languages” and *Enterprise PeopleTools 8.49 PeopleBook: Internet Technology*, “Understanding PeopleSoft Pure Internet Architecture”.

Migrating XML Publisher Translated Languages

XMLP template translation uses related XLIFF files (one for each language) that contain not only specific translation pair but the whole template definition. This is a standard for using XLIFF translation methodology.

Since the translation is tied to the template definition, the translation file (XMLP Template Defn) as well as the specific XLIFF files (XMLP File Defn) should be included in the project.

Note. If the template file is not copied with the language files, the correct translation file may not be used when the report is run. Run a SYSAUDIT for Audit XML Publisher Integrity and delete any orphaned definitions.

See *Enterprise PeopleTools 8.49 PeopleBook: Data Management*, “Ensuring Data Integrity,” XML Publisher for PeopleSoft Integrity.

Cleaning Up XML Publisher Metadata

To insure the integrity of the XML Publisher files run the application engine program PSXPCLEAN.

This application engine program will:

- Find unreferenced objects in PSFILEDEFN.
- Find template definitions and template translations for which file objects are missing.
- Find inconsistencies between PSFILEDEFN and PSFILEDATA.

This application engine program is delivered in *Report and Delete* mode. To run the program in *Report Only* mode, open PSXPCLEAN in Application Designer and uncomment the following statement in PSXPCLEAN:Main:Start PeopleCode action:

```
rem PSXPFILECLN_AET.REPORT_ONLY_FLAG = "Y"
```

PSXPCLEAN could be scheduled and run via PeopleTools, Process Scheduler, System Process Request page. This program should be run on a regular basis to keep template metadata consistent.

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	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. In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing. In PeopleSoft Enterprise Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks. 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.
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	The arbiter when multiple price rules match the transaction. This plan determines the order in which the price rules are applied to the transaction base price.
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.
auction event	In PeopleSoft Strategic Sourcing, a sourcing event where bidders actively compete against one another to achieve the best price or score.
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.
bid response	In PeopleSoft Strategic Sourcing, the response by a bidder to an event.
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 unit constraints	In PeopleSoft Strategic Sourcing, these constraints apply to a selected Strategic Sourcing business unit. Spend is tracked across all of the events within the selected Strategic Sourcing business unit.
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.
buy event	In PeopleSoft Strategic Sourcing, for event creators, the purchase of goods or services, most typically associated with a request for quote, proposal, or reverse auction. For bidders, the sale of goods or services.
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.
cash drawer	A repository for monies and payments taken locally.
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.
claimback	In the wholesale distribution industry, a contract between supplier and distributor, in which monies are paid to the distributor on the sale of specified products or product groups to targeted customers or customer groups.
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).
constraint	A business policy or rule that affects how a sourcing event is awarded. There are three types of constraints: business, global, and event.
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 plus pricing	In PeopleSoft Enterprise Pricer, a pricing method that begins with cost of goods as the basis.
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.
counter sale	A face-to-face customer transaction where the customer typically selects items from the storefront or picks up products that they ordered ahead of time. Customers pay for the goods at the counter and take the goods with them instead of having the goods shipped from a warehouse.
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 <i>class</i> .
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.
direct receipt	Items shipped from a warehouse or vendor to another warehouse.
direct ship	Items shipped from the vendor or warehouse directly to the customer (formerly referred to as <i>drop ship</i>).
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 constraints	In PeopleSoft Strategic Sourcing, these constraints are associated with a specific sourcing event. Spend is tracked within the selected event.
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.
financial sanctions	For U.S. based companies and their foreign subsidiaries, a federal regulation from the Office of Foreign Assets Control (OFAC) requires that vendors be validated against a Specially Designated Nationals (SDN) list prior to payment. For PeopleSoft Payables, eSettlements, Cash Management, and Order to Cash, you can validate your vendors against any financial sanctions list (for example, the SDN list, a European Union list, and so on).
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.
GDS	Abbreviation for <i>Global Distribution System</i> . Broad-based term to describe all computer reservation systems for making travel plans.
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.
global constraints	In PeopleSoft Strategic Sourcing, these constraints apply across multiple Strategic Sourcing business units. Spend is tracked across all of the events from the multiple Strategic Sourcing business units.
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.
ideal response	In PeopleSoft Strategic Sourcing, a question that requires the response to match the ideal value for the bid to be considered eligible for award. If the response does not match the ideal value, you can still submit the bid, but it will be disqualified and ineligible for award.
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.
itinerary	In PeopleSoft Expenses, a collection of travel reservations. Itineraries can have reservations that are selected and reserved with the travel vendor. These itineraries are not yet paid for and can be referred to as <i>pending reservations</i> . Reservations that have been paid for are referred to as <i>confirmed reservations</i> .
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.
KVI	Abbreviation for <i>Known Value Item</i> . Term used for products or groups of products where the selling price cannot be reduced or increased.
landlord	In PeopleSoft Real Estate Management, an entity that owns real estate and leases the real estate to tenants.
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.
lease	In PeopleSoft Real Estate Management, a legally binding agreement between a landlord and a tenant, where the tenant rents all or part of a physical property from the landlord.
lease abstract	In PeopleSoft Real Estate Management, a summarized version of the complete lease contract with only the important terms. The lease abstract usually fits on one page and does not include legal terminology.
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.
line	In PeopleSoft Strategic Sourcing, an individual item or service upon which there can be a bid.

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 SQLExec 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.
NDP	Abbreviation for <i>Non-Discountable Products</i> . Term used for products or groups of products where the selling price cannot be decreased.
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.
Optimization Engine	A PeopleTools component that Strategic Sourcing leverages to evaluate bids and determine an ideal award allocation. The award recommendation is based on maximizing the value while adhering to purchasing and company objectives and constraints.
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.
phase	A level 1 task, meaning that if a task had subtasks, the level 1 task would be considered the phase.
pickup quantity	The product quantity that the customer is taking with them from the counter sales environment.
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.
predecessor task	A task that you must complete before you start another task.
price breaks	In PeopleSoft Strategic Sourcing, a price discount or surcharge that a bidder may apply based on the quantity awarded.
price components	In PeopleSoft Strategic Sourcing, the various components, such as material costs, labor costs, shipping costs, and so on that make up the overall bid price.
price list	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	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 conditions	Conditions that select the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields relate to the transaction.
price rule key	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 adds	The pricing functionality where buying product A gets product B for free or at a price (formerly referred to as <i>giveaways</i>).
product bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.
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.
proxy bidding	In PeopleSoft Strategic Sourcing, the placing of a bid on behalf of the bidder, up or down to the bidder's specified amount, so that the bidder can be the leading bidder.

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.
reservations	In PeopleSoft Expenses, travel reservations that have been placed with the travel vendor.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
RFI event	In PeopleSoft Strategic Sourcing, a request for information.
RFx event	In PeopleSoft Strategic Sourcing, a request for proposal or request for a quote event when bidders submit their overall best bids and during which bidders do not actively compete against one another.
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.
saved bid	In PeopleSoft Strategic Sourcing, a bid that has been created but not submitted. Only submitted bids are eligible for award.
score	In PeopleSoft Strategic Sourcing, the numerical sum of answers (percentages) to bid factors on an event. Scores appear only to bidders on auction events.
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.
sell event	In PeopleSoft Strategic Sourcing, for event creators, the sale of goods or services most typically associated with forward auctions. For bidders, the purchase of goods or services.
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	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. 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.
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.
short-term customer	A customer not in the system who is entered during sales order entry using a template.

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.
sourcing objective	For constraints, the option to designate whether a business rule is required (mandatory) or is only recommended (target).
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	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). 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).
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.
task	A deliverable item on the detailed sourcing plan.
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.
tenant	In PeopleSoft Real Estate Management, an entity that leases real estate from a landlord.
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.
tiered pricing	Enables different portions of a schedule to be priced differently from one another.
time span	A relative period, such as year-to-date or current period, that various PeopleSoft General Ledger functions and reports can use when a rolling time frame, rather than a specific date, is required.
total cost	In PeopleSoft Strategic Sourcing, the estimated dollar cost (sum of real price dollars and potential “soft” or non-price dollars) of a particular award approach.

travel group	In PeopleSoft Expenses, the organization's travel rules and policies that are associated with specific business units, departments, or employees. You must define at least one travel group when setting up the PeopleSoft Expenses travel feature. You must define and associate at least one travel group with a travel vendor.
travel partner	In PeopleSoft Expenses, the travel vendor with which the organization has a contractual relationship.
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.
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 *inquiry access*.

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 term 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.
weight or weighting	In PeopleSoft Strategic Sourcing, how important the line or question is to the overall event. Weighting is used to score and analyze bids. For RFx and RFI events, weightings may or may not appear to bidders.
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 *zero-rated value-added tax*. 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.

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