



# PeopleSoft NW RUG

How Can Oracle Business Intelligence Publisher Serve Your PS 9.2 Reporting Needs?

Presented by:

Randy Johnson
Shahin Islam
SpearMC Consulting

# **Agenda**

- Introductions
- SpearMC Solutions Overview
- Reporting Tools Overview
- BI Publisher Overview
- Examples, Tips, and Tricks
- Questions and Answers



# Introductions

#### Introductions

#### Randy Johnson

- SpearMC Managing Director
- PeopleSoft Financials, Financial Controls and Reporting Expert
- Certified PeopleSoft v9.x Financials
- 20+ Years Experience...majority PeopleSoft

#### Shahin Islam

- SpearMC Technical Specialist
- Solution Architect
- Custom Development & Upgrades
- 16 + Years of PeopleSoft implementation experience

#### You

- Who is learning about BI Publisher for the first time?
- Who works at an organization that uses BI Publisher, but has not been involved with it themselves?
- Who is a BI Publisher guru?



# SpearMC Solutions Overview

## **About SpearMC**

#### Who is SpearMC?



- SpearMC is a full-service consulting and technology services firm with specific focus on Oracle/PeopleSoft Applications
- Our Local and well-connected network of top-tier Business Analysts, Technical Leads, Developers and Project Managers keep travel related costs to a minimum
- It is our goal to provide top-tier professional services at competitive rates



## Our Expertise...



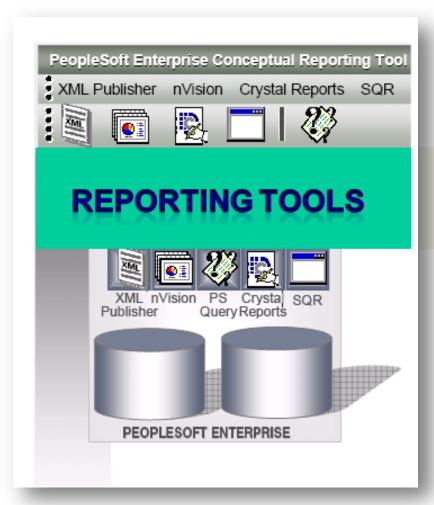
- Project Management
- OperationsImprovement
- BusinessIntelligence
- Education
- ☑ IT Strategy/
  Architecture
- ApplicationDevelopment
- **☑** ERP Integration
- **☑** Recruiting/Support



# Reporting Tools Overview

# **Reporting Tools**

#### **Tools bundled with PeopleSoft**



7 SQR

Query

7 nVision

Crystal Reports

**3** BI Publisher

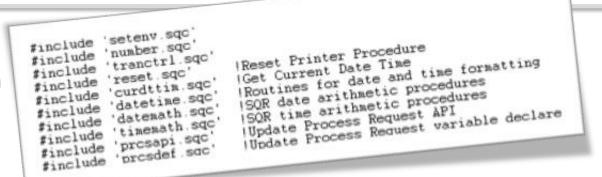


#### **SQR**

Very powerful-full database access within a "report"

#### Modular

- re-use logic in building blocks
- override delivered logic
- Part of the Oracle family
- Built-in support for debugging
- Programmer-centric
  - quick to build and run
  - requires a technical resource
- Lots of knowledge in the PeopleSoft community





#### **SQR**

### **Key Factors**

SQR talent

Data more important than presentation

Build reporting tables; performance requirements

#### Concerns

Buried business logic

**External Migration** 



## Query

#### Empowers business users

- Solve their own problems
- Explore data

#### **7** Built-in features

- Security (including new security optimization)
- Query Access Server (instant web service)
- Translate tables
- Embedded URLs
- Output to Excel

	Course	Descr	Session	Start	Length	Instructor
1	1033	Introduction to CRM		05/18/2009	_	GXI - Gina Isenberg
2	1034	Call Desk Essentials		06/15/2009		AGH - Anita G Harris
3	1005	General Ledger I		03/03/2008		MEB - Mary Belknap
4	1005	General Ledger I	111	07/21/2008		SAS - Scott M. Sarris
5	1005	General Ledger I	284	02/18/2008	5.0	DHS - Doug Shore
6	1005	General Ledger I	292	03/17/2008	5.0	JCO - John Coscia
7	1005	General Ledger I	305	11/10/2007	5.0	TEP - Tracy Paugh
8	1009	Payables	4.45	03/03/2008	6.0	TEP - Tracy Paugh

#### Outsource processing criteria/logic to query and business users



# Query

# Key Factors

Tabular data

Dynamic criteria

Users want spreadsheets

#### Concerns

Shared (copied) private queries

Poorly written queries



#### **nVision**



- Power of Excel
- Tightly connected to PeopleSoft data
  - Ledgers
  - Trees
- Matrix layout plus nPlosion provides quick access to details
- Drill-down into additional reports



#### **nVision**

# **Key Factors**

Data requires interactive analysis

Financial, ledger data

#### Concerns

nVision talent

Setup and maintenance



# **Crystal Reports**



- GUI Report Designer
  - Drag-and-drop
  - Preview look and feel
- Query-driven data
- Many delivered reports are in based on Crystal



# **Crystal Reports**

## **Key Factors**

**Presentation matters** 

Based upon underlying queries

#### Concerns

**External migration** 

Non-Oracle solution



#### **BI Publisher**

- Formerly called XML Publisher
- Report designer is Microsoft Word
- Query or Connected Query as data source
- Output to HTML, PDF, Rich Text, or Excel
- Split data into multiple reports (Bursting)
  - Post to report repository with security per report
  - Enable search by report data
- Templates enable one report with multiple formats

```
fowset name="P:mDefn" size="1708" count="1">
  destUpdDttm>2011-11-10-13.39.08.000000/pdDttm
  <szlastUpdOprId>TKUMMER01</szlastUpdOprId>
  <szObjectOwnerID></szObjectOwnerID>
  <nUseCount>1</nUseCount>
  <buseUpdate>1</buseUpdate>
  <1Version>25236</1Version>
  <1SwapVersion>0</1SwapVersion>
  <nSwapNum>0</nSwapNum>
  <szProjectName>G9 EMAIL NOTIF</szProjectName>
  <szLanguageCd>ENG</szLanguageCd>
  <szProjectDescr>Email Notifications</szProjectDescr>
  <szTgtServerName></szTgtServerName>
  <szTgtDBName></szTgtDBName>
  <szTgtOprId></szTgtOprId>
  <fReportFilter>16232832</fReportFilter>
  <eTargetOrientation>0</eTargetOrientation>
  <eCompareType>1</eCompareType>
  <fKeepTgt>31</fKeepTgt>
  <nCommitLimit>50</nCommitLimit>
  <szCompRelease></szCompRelease>
  <szCompRelDttm></szCompRelDttm>
  <bMaintenanceProject>0</bMaintenanceProject>
  <bUseDbFieldNameAttrib>0</bUseDbFieldNameAttrib>
  <szReleaseLabel></szReleaseLabel>
  <szReleaseDttm></szReleaseDttm>
  <nDescrLongLen>414</nDescrLongLen>
  <hDescrLong> HANDLE
     (rowset name="char" size="414" count="1">
```



#### **BI Publisher**

<b>Key F</b>	actors
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**Presentation matters** 

Business analysts involved

Multiple formats

Online: Print page

Based upon underlying queries

#### Concerns

Keep template simple

Performance for large volume



# BI Publisher Setup

#### **Data Sources**

# Query

- Users can build data source
- · Delivered page runs query-based BIP reports
- End-to-end report development without a single line of code

# XML File

- · Good for external sources of data
- · Recommended for large volumes

# Rowset

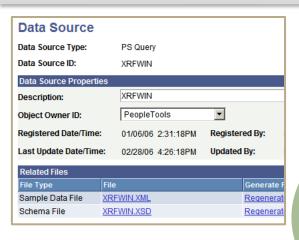
- Deprecated (8.50)
- Provides developer with very dynamic data source
- Component buffer

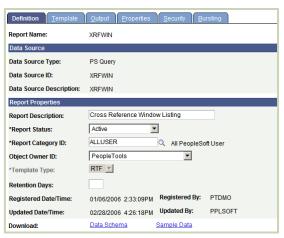
# XMLDoc

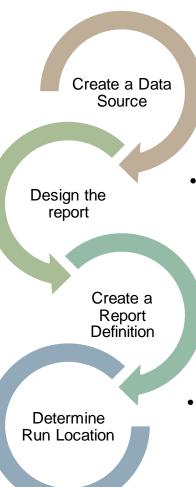
- Deprecated (8.50)
- Can be generated from a rowset
- Enables transformation with XSL



# **Creating a Report**







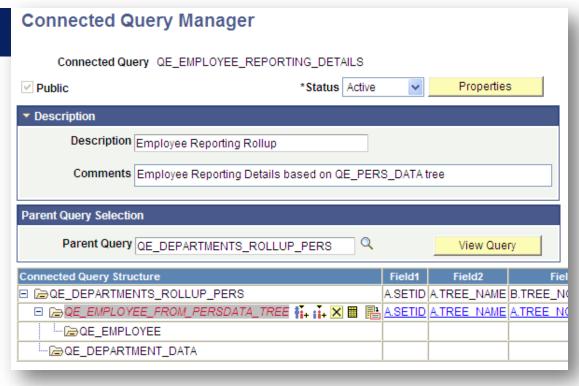
- Choose where the data will come from (Query, PeopleCode, or file), then create Data Source Definition.
- Use the sample data form the Data Source with the Microsoft Word plug-in to create the report template.
  - On the report definition, select the Data Source, then upload the template. Run a sample report from here.
- Run control, push button, or report manager.
   If query-based, use the delivered Query-BIP run control.



## **Connected Query**

# Connected Query provides the ability to create a single XML file based on a set of queries with parent-child relationships

- A Connected Query is a hierarchical object built with existing PeopleSoft Queries
- A parent query can nest "n" levels of child queries and any child query can have "m" sibling queries within a hierarchy
- The output for connected query is always an XML file
- Connected Query can be used as a data source for XML Publisher reports





## **Descriptive Names**

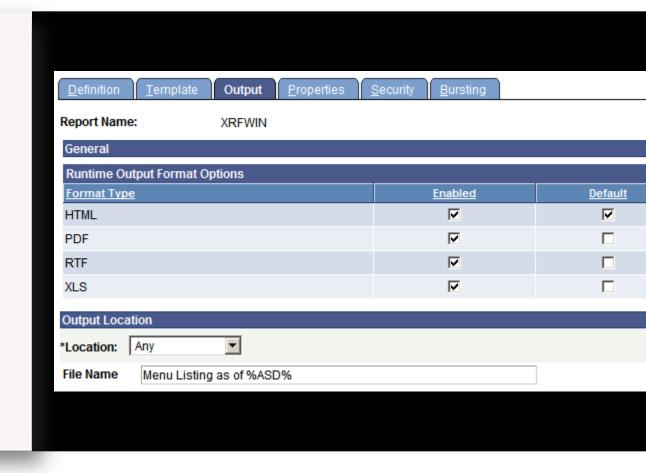
# Issue: Every time you run a report it would output the exact same filename, thus overriding your existing file

#### Solution

# The following variables are now supported:

- %ASD% will insert the As-Of Date
- %RID% will insert the Report ID
- %BTV% will insert the burst field value
- %field% where field is a the name of a field from the XML data that lies below the first repeating field

**Example:** If you have an EMPLID field, use %EMPLID%, at runtime the value of that field will be used. All burst key candidates on the on the bursting page are eligible.

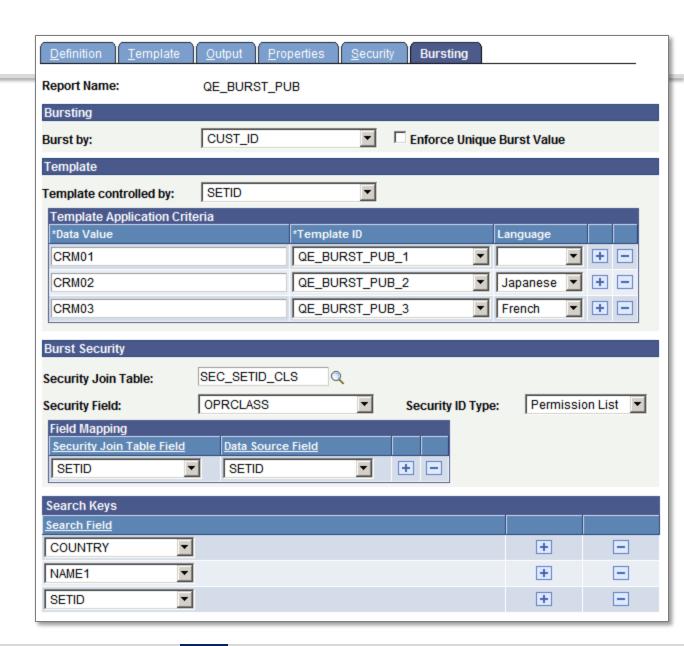




# **Bursting**

Let the report data do the work:

- Generate reports per customer, employee, department...
- Select template and language
- Post to report manager with dataspecific security
- Report-specific search keys





Examples, Tips, and Tricks

# **Job Codes by Job Family**

- Requirement: Show four jobs per page, tiled horizontally
- Job Family might have just2 or 3, or might have 15 jobs
- Option 1: Group jobs in the RTF template
- Option 2: After generating XML, use XSLT in PeopleCode to create groups of four



- Chose Option 2 in order to keep the template simple. Many things are possible in templates, but focus on what it does well: Bullets and Bold.
  - use PeopleCode + pure XSLT to do the heavy lifting
  - store XSLT in html definitions
  - use built-in function TransformEx
  - don't try to do it all at once



# **Job Codes by Job Family**

#### **Key Factors**

- Presentation mattered: Result was a polished PDF served up from the company's intranet
- Multiple layouts: Organization changes were in process, so not all Job Families used new format
- Push button: Added a push button to the Job Family page so report could be previewed before it was posted to intranet

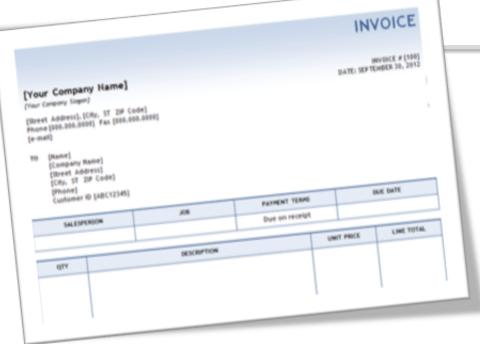
#### Concerns

Keep template simple



# **Invoicing in PS 9.2 Billing**

- Delivered: Create an app engine for each different report (aka invoice)
- Client had six different invoices and the potential for adding more
- Business analyst desired a standardized but flexible solution



We decided on a convention: Invoice Layout Id would match Template Id. Created a single new app engine to generate any invoice.



# **Invoicing in PS 9.2 Billing**

### Key Factors

- Business analyst involvement:
   The analyst created all the report templates
- Multiple layouts: By business unit or by customer the invoice requirements changed

#### Concerns

Need for technical resource



# **Questions and Answers**

www.SpearMC.com

#### **Contact Information**



Marcus Bode, Principal

mbode@spearmc.com

Shahin Islam, Technical Specialist

Shahin.islam@spearmc.com

Randy Johnson, Managing Director

Randall.johnson@spearmc.com

