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# Mastering PeopleSoft Reporting

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Hardware and Software  
Engineered to Work Together

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# Program Agenda

- How reporting is being redefined
- Enhancing user experience through reporting
- What's new in 8.53
- Top Tips from Support Cases
- How can you be a hero on Monday?

# Reporting Redefined

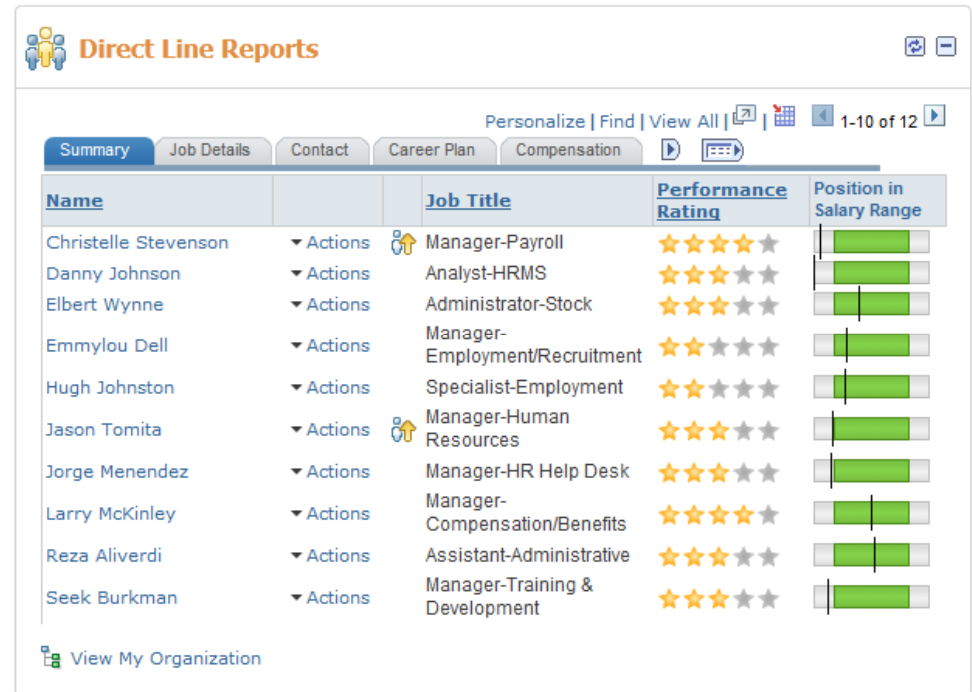
## Evolution in our applications

- User experience = productivity
  - Access to information
- Super-user experience moving to a self-service experience
- More people touch enterprise data than ever before
  - Employee self-service, executive information, etc.

# Reporting Redefined

## Example: HR Manager

- How many SQRs would you run to get this information?



**Direct Line Reports**

Personalize | Find | View All | 1-10 of 12

Summary | Job Details | Contact | Career Plan | Compensation

Name	Actions	Job Title	Performance Rating	Position in Salary Range
Christelle Stevenson	▼ Actions	Manager-Payroll	★★★★★	
Danny Johnson	▼ Actions	Analyst-HRMS	★★★★★	
Elbert Wynne	▼ Actions	Administrator-Stock	★★★★★	
Emmylou Dell	▼ Actions	Manager-Employment/Recruitment	★★★★★	
Hugh Johnston	▼ Actions	Specialist-Employment	★★★★★	
Jason Tomita	▼ Actions	Manager-Human Resources	★★★★★	
Jorge Menendez	▼ Actions	Manager-HR Help Desk	★★★★★	
Larry McKinley	▼ Actions	Manager-Compensation/Benefits	★★★★★	
Reza Aliverdi	▼ Actions	Assistant-Administrative	★★★★★	
Seek Burkman	▼ Actions	Manager-Training & Development	★★★★★	

[View My Organization](#)

# Reporting Redefined

How has reporting changed?

- Visual v.s. paper
- Functionally related information in one place
- Data in-context with business processes
- Mobile

# Enhancing User Experience with Reporting



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# Pivot Grids

- Ad-hoc analysis without having to build new queries
  - Drag and drop columns for different answers

## Expense Analysis

Display Chart

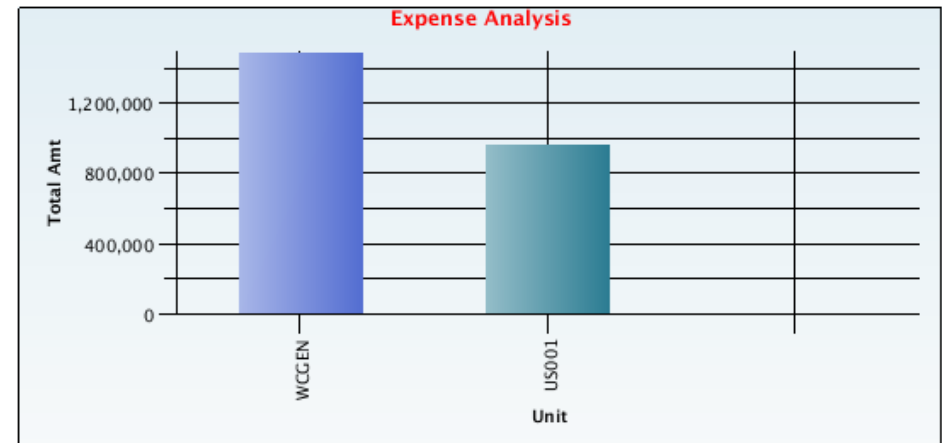
 Export All Data

Pivot Grid

Account: 600020 Dept: All Year: 2011 Period: 1

	Sum: Total Amt
All	2464118.693
US001	967507.106
WCGEN	1496611.587

 Bar  Line  Pie



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# Query Drill Pagelets

- Actionable alerts
- Query as a navigation structure

[Favorites](#) > [Main Menu](#) > [General Ledger](#) > [GL Workcenter](#) > [Open Period](#) [My Links](#)
Home | [Worklist](#) | [Sign Out](#)

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All Search Advanced Search

Welcome Justine! Wed, Sep 26, '11

[My Page](#) | [My HR](#) | [Financial Mgr Dashboard](#)

[New Window](#) | [Help](#) | [Personalize Page](#) | [http](#)

**GL Workcenter**

[My Work](#) | [Ledger Tasks](#) | [Workcenters](#)

**Journals To Review**

Unit	Journal ID	Date	Status	Des
US001	<a href="#">0000004184</a>	2011-01-24	V	
US001	<a href="#">0000004524</a>	2012-01-10	V	
US001	<a href="#">0000004529</a>	2012-01-11	N	

**Journals In Error**

Unit	Journal ID	Date	Status
US001	<a href="#">AP00003790</a>	2007-12-03	E
US001	<a href="#">AP00003800</a>	2009-09-22	E
US001	<a href="#">EXACC03297</a>	2007-03-19	E

**Ledger Open Periods**

Unit	First Open	Last Open
<a href="#">US001</a>	2005-01-01	2013-12-31
<a href="#">US003</a>	2004-01-01	2011-12-30
<a href="#">US004</a>	2004-01-01	2013-12-31

**Open Period Update**

PeopleSoft Product: GL    Business Unit: US001    Ledger Group:

Show all transaction types

**Open Period(s)**

Trans Type	Description	From Year	From Period	First Open	To Year
DEF	Default	2005	1	01/01/2005	2013
PCA	Procurement Car	2005	1	01/01/2005	2013
POR	Purchase Order	2005	1	01/01/2005	2013
RCA	Receipt Accrual	2005	1	01/01/2005	2013
REQ	Requisition	2005	1	01/01/2005	2013
UNP	GL Journal Unpost	2005	1	01/01/2005	2013

**Include Adjustment Periods**

*Adjustment Period	*Adjustment Year	Is Open	Default
<a href="#">901</a>	2005	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">902</a>	2005	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">903</a>	2005	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">904</a>	2005	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<a href="#">905</a>	2005	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Business Unit: US001

## BI Publisher Drills

0000000044: Stars Inc.

- “Live” reports
- Drill from PDF to PeopleSoft

Voucher ID	Invoice ID
00000581	<a href="#">TFG1</a>
00000582	<a href="#">TFG2</a>



Summary		Related Documents		Invoice Information		Payments		Voucher Attributes		Error Summary	
Business Unit:	US001	Invoice Date:	01/10/2011	Voucher ID:	00000582	Invoice No:	TFG2	Voucher Style:	Regular	Invoice Total:	1,200.00 USD
Contract ID:		Vendor Name:	Stars Inc. 221 State Street Pleasanton, CA 94588	Pay Terms:	Net 30	Voucher Source:	Online	Entry Status:	Postable	Origin:	ONL
Match Status:	No Match	Approval Status:	Approved	Created:	01/10/2011	Modified:	01/10/2011	Post Status:	Posted	Created By:	CROTH
Budget Status:	Valid	Budget Misc Status:	Valid	Modified By:	CROTH	ERS Type:	Not Applicable	*View Related:	Payment Inquiry	Close Status:	Open

Summary | Related Documents | Invoice Information | Payments | Voucher Attributes | Error Summary

## Drill to BI Publisher

- Bypass components and run control pages
- Create an iScript that calls BI Publisher
- Create queries that drill to it

**My Communications**

Sequence	Letter	Communication Date	Completed?	Date Completed
1	Verification Selection Notice	2010-10-04		2010-10-04
2	Verification Selection Notice	2010-10-04		

### ORACLE<sup>®</sup> University

Keith Mars  
1234 Pacific Court  
Neptune, CA 96750

Student ID: FADEMO0001  
Date: 2010-10-04

Dear Keith,  
Thank you for your interest in our university. Your application has been selected for Financial Aid Verification for Aid Year 2011. Please go to your Student Center at [www.oracleuniversity.com/stu-login](http://www.oracleuniversity.com/stu-login) and return the following documents to our office.

Pending Items	Due Date
VERWKD - Please complete and return the enclosed Verification Worksheet. Items of particular importance are the Number in Household, Number in Family, and sources of untaxed income. You and your parent(s) must sign and date the form.	2010-12-03
1040P - Please provide a signed copy of your Federal 1040, 1040A, or 1040EZ tax return.	2010-12-03
1040S - Please provide a signed copy of your Federal 1040, 1040A, or 1040EZ Tax Form.	2010-12-03
001001 - Please provide a copy of your State Withholding Tax form.	2010-12-03

If you have any questions please feel free to contact us for more information at:  
Phone: 888-555-1212  
Web: [www.ofa-oracleuniversity.edu](http://www.ofa-oracleuniversity.edu)  
Email: [verification@ofa-oracleuniversity.edu](mailto:verification@ofa-oracleuniversity.edu)

Sincerely,  
Gina Godfrey  
Office of Financial Aid

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# Design Patterns

- Dashboards
  - Role-based
  - Functionally related data
- Build Queries for extensibility
  - Drill URLs
  - Base for:
    - Pagelets
    - BI Publisher reports

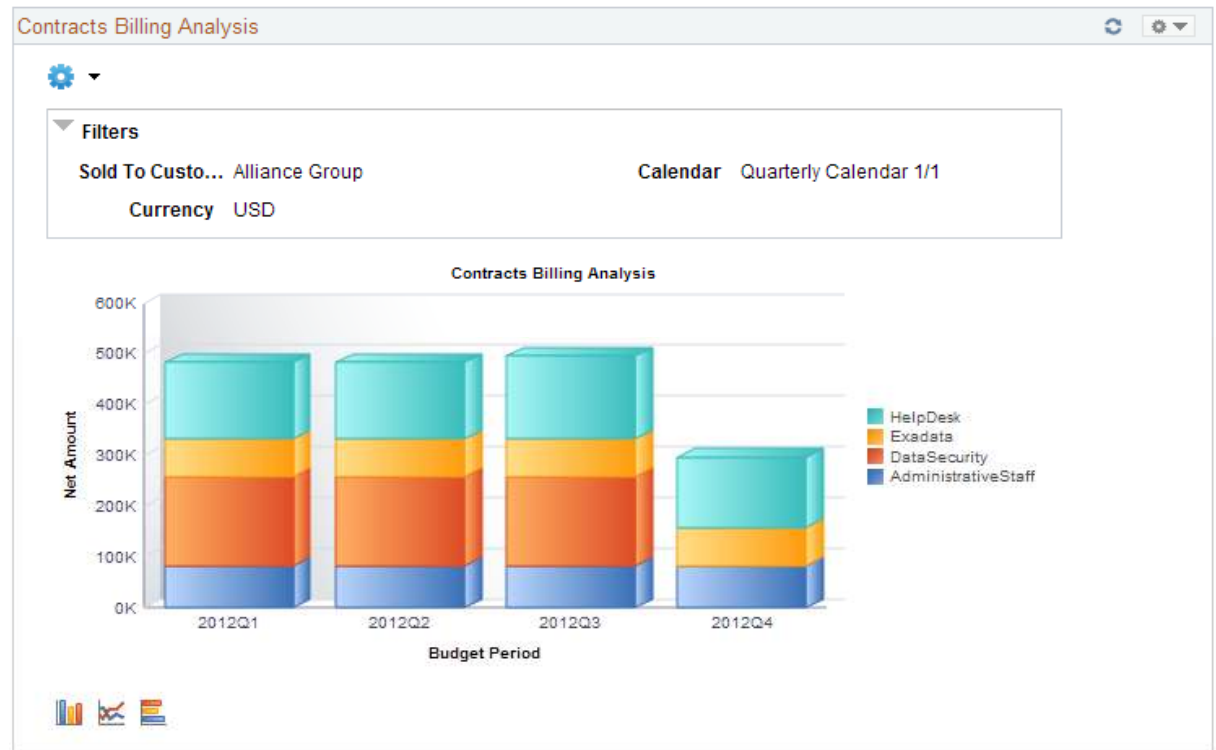
# What's New



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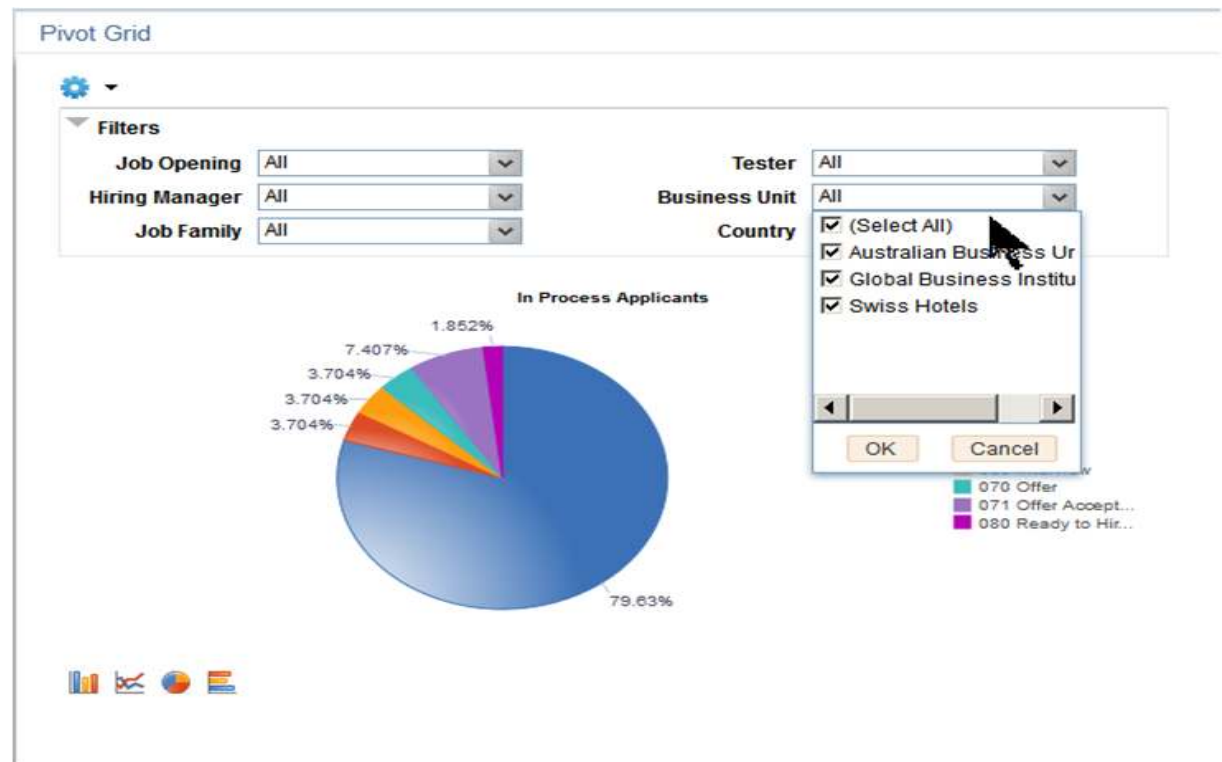
# Pivot Grid Enhancements

- Related Actions
- Multiselect filtering
- Prompts via URL
- Chart-only pivoting
- Interwindow communication



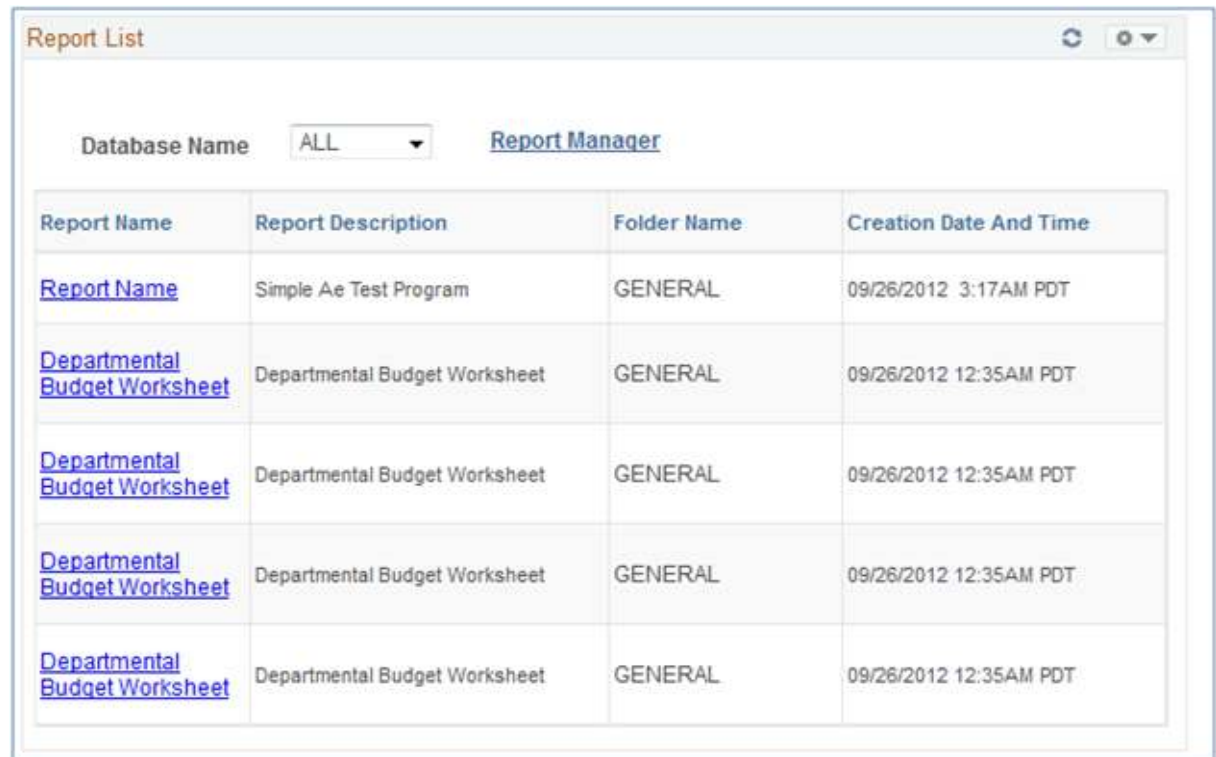
# Pivot Grid Enhancements

- Related Actions
- Multiselect filtering
- Prompts via URL
- Chart-only pivoting
- Interwindow communication



# Report List Pagelet

- Multiple application view
- Open report directly instead of Report Manager
- Group multiple report instances



Report Name	Report Description	Folder Name	Creation Date And Time
<a href="#">Report Name</a>	Simple Ae Test Program	GENERAL	09/26/2012 3:17AM PDT
<a href="#">Departmental Budget Worksheet</a>	Departmental Budget Worksheet	GENERAL	09/26/2012 12:35AM PDT
<a href="#">Departmental Budget Worksheet</a>	Departmental Budget Worksheet	GENERAL	09/26/2012 12:35AM PDT
<a href="#">Departmental Budget Worksheet</a>	Departmental Budget Worksheet	GENERAL	09/26/2012 12:35AM PDT
<a href="#">Departmental Budget Worksheet</a>	Departmental Budget Worksheet	GENERAL	09/26/2012 12:35AM PDT



# Reporting Console

- Drag and drop
- Drop-down selectors
- Import favorites from other users

The screenshot displays the Reporting Console interface. At the top, there are navigation buttons: Preference (with a red briefcase icon), New (with a document and pencil icon), Quick Run (with a magnifying glass icon), Import Favorites, and Process Monitor Report Manager. Below these is a toolbar with 'Personalize | View All' and pagination controls 'First 1-9 of 9 Last'. The main area is a list of reports under the heading 'Name'. The list includes folders: My Reports, My Process Requests, My Favorites (with a dropdown arrow), Yearly Runs (with a dropdown arrow), Monthly Runs (with a dropdown arrow), Weekly Runs (with a dropdown arrow), Daily Runs (with a dropdown arrow), and Ad-hoc Runs (with a dropdown arrow). The last item is 'Simple AE test program' (with a dropdown arrow). A context menu is open over 'Simple AE test program', showing 'Edit', 'Delete', and 'Run' (highlighted by a mouse cursor).

# Reporting Console – Import Favorites

- Mark Favorites as Public
- Users can import

The screenshot displays the Reporting Console interface. At the top, there are navigation tabs: Preference, New, Quick Run, Import Favorites, and Process Monitor Report Manager. Below these is a search bar with 'Person' and 'View All' options, and a pagination control showing 'First', '1-9 of 9', and 'Last'. A red arrow points from the 'Import Favorites' tab to a dialog box titled 'User ID' with a search input field and 'OK' and 'Cancel' buttons. Another red arrow points from the 'Preference' tab to a 'View Preferences' dialog box. This dialog box has several sections: 'Default Folder' with a table, 'Process Link Display Option' with radio buttons, 'Process Request Display Option' with search fields, 'Display Options for My Reports' with dropdowns, and 'Export Favorites' with a checked checkbox for 'Public Access to Favorites'. A red box highlights the 'Export Favorites' section.

Type	Display Order	Active
My Reports	1	<input checked="" type="checkbox"/>
My Process Requests	2	<input checked="" type="checkbox"/>
My Favorites	3	<input checked="" type="checkbox"/>

# What's New

## Query Transform

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Favorites Main Menu > Reporting Tools > Query > Query Manager

Records Query Expressions Prompts Fields Criteria Having Transformations

Query Name QE\_XFORM\_XRFWIN Description qe copy of XRFWIN

Add XSLT

User Defined Output Personalize | Find | First 1-2 of 2 Last

Name	Output File Type	Edit XSLT	Preview
qe_xrfwinCSV	TXT	<a href="#">Edit XSLT</a>	<a href="#">Preview</a>
qe_xrfwinFixformat	TXT	<a href="#">Edit XSLT</a>	<a href="#">Preview</a>

```
ADJUST_BILLS,1,Manage &Sales Activities
ADJUST_BUDGETS,1,Process &Financial Information
ADMINISTER_ACCOUNTING,1,Manage Treasur&y
ADMINISTER_CONTRACTS,1,A&administer Procurement
ADMINISTER_DEALS,1,Manage Treasur&y
ADMINISTER_EXPENSE_FUNCTIONS,1,Manage E&xpenses
ADMINISTER_LEASES,1,Administer Leases
ADMINISTER_SECURITY,1,Define &Business Rules
ADMINISTER_SITES,1,Administer Sites
ADMINISTER_VAT,1,Define &Business Rules
ADMINMOBILE_MENU,1,Administer Mobile
ADMIN_EXCISE_SALES_TAX_IND,1,Define &Business Rules
ALTNAME POP,1,
```

# What's New

## Query Transform

Process Scheduler Request

User ID: VP1      Run Control ID: rct1

Server Name:       Run Date: 09/26/2012

Recurrence:       Run Time: 7:21:04PM

Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format	Distribution	*Transformation
<input checked="" type="checkbox"/>	PSQUERY	PSQUERY	Application Engine	Web	XFORM	Distribution	<input type="text"/>
							qe_xrfwinCSV
							qe_xrfwinFixformat

# What's New

## Query Transform

**Report Index**

**Report**

**Report ID:** 8164      **Process Instance:** 10555      [Message Log](#)

**Name:** PSQUERY      **Process Type:** Application Engine

**Run Status:** Success

qe copy of XRFWIN for ondemand

**Distribution Details**

**Distribution Node:** http      **Expiration Date:** 10/03/2012

**File List**

<a href="#">Name</a>	<a href="#">File Size (bytes)</a>	<a href="#">Datetime Created</a>
<a href="#">AE_PSQUERY_10555.stdout</a>	304	09/26/2012 7:25:29.032000PM PDT
<a href="#">QE_XFORM_XRFWIN-10555.TXT</a>	18,359	09/26/2012 7:25:29.032000PM PDT

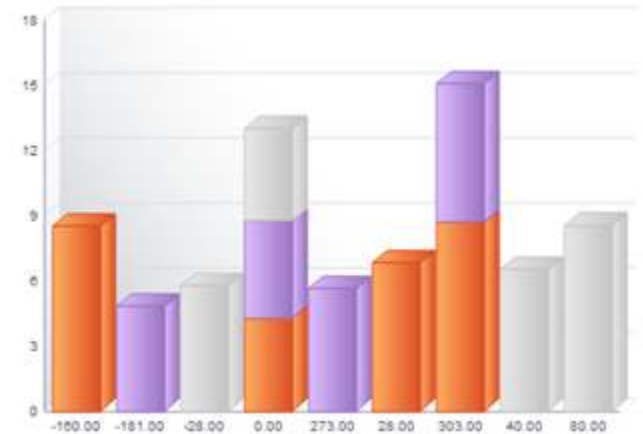
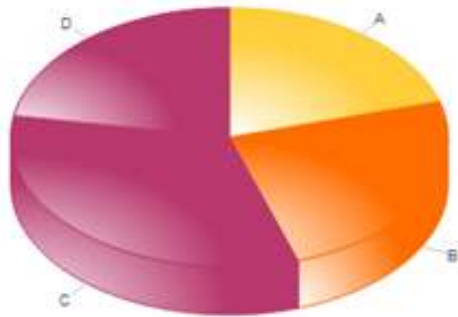
**Distribute To**

<a href="#">Distribution ID Type</a>	<a href="#">*Distribution ID</a>
User	VP1

[Return](#)

# New Chart Styles

- SVG
  - Smooth scaling
- PNG
  - When browser doesn't support SVG



# SQR Enhancements

- PDF support enhancements
  - Support for PDF accessibility (Tagged PDF)
  - Compliant with Adobe Distiller and Acrobat Pro
- Removal of processing limits
  - No longer a need to split program files
  - System virtual memory is your only constraint

# nVision – Support for Runtime Query Prompts

Previously: only in the nVision client

Web prompt on drilldown

Prompt values used for report generation

Run Drilldown

Report Instance: 10533\_8168

Row: 7 Column: 3

\*Type: Web

Available Drilldown Layouts Personalize Find First 1-23 of 23 Last

Description	*Server Name	Run Drilldown
AP Detail	PSNT	Run Drilldown
Account by Business Unit	PSNT	Run Drilldown
Account by Department	PSNT	Run Drilldown
Account by Period	PSNT	Run Drilldown
Account by Product	PSNT	Run Drilldown
Accounts by Actuals/Budgets	PSNT	Run Drilldown
Business Unit by Period	PSNT	Run Drilldown
Business Unit by Account	PSNT	Run Drilldown

QE\_MATPROMPT

Unit: US001

Ledger: LOCAL

OK

Cancel



# More Enhancements....

- Connected Query
  - Performance enhancements
- Cube Manager
  - Native XLS format

# Beyond 8.53

## Composite Query

- <<Jody to provide content>>

# Top Tips from Support Cases



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## Tip: Editable PDF

- <<Jody to provide content>>

## Tip: Font Setup

- <<Jody to provide content>>

# How to be a Hero on Monday



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# Reporting Design Patterns

- Dashboards and Pagelets v.s. reports
- Pivot grids for first level of ad-hoc analysis
- Build queries drill URLs for reuse
- Workcenters and Query Pagelets
- Start thinking of queries as modular building blocks
  - Now: Connected Query
  - Future: Composite Query



# Questions?

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# What's New

- Connected Query
  - Performance enhancements
- Cube Manager
  - Native XLS format
- Query
  - Left outer join to Any
  - Changes to component drill URL