

Adding Rich Excel Reporting To Your PeopleSoft Web

Session #20181

March 13, 2006

**Alliance 2006 Conference
Nashville, Tennessee**

Sit back and relax!

- Conference Site

Your Tour Guides

University of Houston

David Vandiver (dvandive@central.uh.edu)

&

Mike Chang (mychang@central.uh.edu)

University of Houston System

UH – Established 1927

UH-Downtown – Established 1974

UH-Clear Lake – Established 1974 – Upper Division

UH-Victoria – Established 1983 – Upper Division

UH System

Students - 57,000

Employees – 12,250



Overview

The University of Houston System has developed a technique:

To produce Rich Excel reports from the PeopleTools web page, without the need for the process scheduler.

Define Rich Excel

A Microsoft© Excel document with any of the following:

- Formatted Cell Styles (font, border, color, etc.)
- Formulas
- Page Styles (Landscape/Portrait, Pagebreaks, etc.)

Rich Excel Example

Univ. of Houston - Clear Lake															
Budget Request Form															
For Fiscal Year 2006															
											Position Total				
Budget/Funding											Assignment			FTE	
Sbed/PO Description		Base Amt	Prop Amt	\$ Change	%	Dist	Base Amt	Prop Amt	Change	Officer Code	Base	Prop	Chg		
B5006 SALARY AND WAGES		466,860	468,150	1,290	0.28										
B5009 L3-MAINTENANCE AND OPERATIONS		8,379	8,379	0	0.00										
Account Total		475,239	476,529	1,290	0.27										
Position 1	3463	50,287	50,287	0	0.00	100.000	50,287	50,287	0		1.00	1.00	0.00		
Employee 1	0078003						50,287	50,287	0	N	1.00	1.00	0.00		
Position 2	0450	92,142	92,142	0	0.00	100.000	92,142	92,142	0		1.00	1.00	0.00		
Employee 2	0078046						92,142	92,142	0	N	1.00	1.00	0.00		

Outline

- ❑ **The Challenge we faced**
- ❑ **The Approach we took**
- ❑ **The Solution we built**

The Challenge-Current Way

Current tools to produce Excel:

- SQR to CSV (Comma Separated Values)
- nVision
- PSQuery (semi-rich)

The Challenge-Why Rich Excel?

Benefits of Rich Excel as a reporting solution:

- End-users requested fonts, color, & formulas.
- End-users are familiar with Excel.
- Excel reports can have a uniform output.
- Reports need to be created quickly (without a process scheduler).
- Less storage requirements.

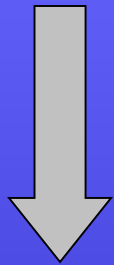
The Approach-New Way

New option by combining tools:

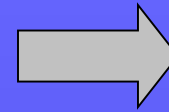
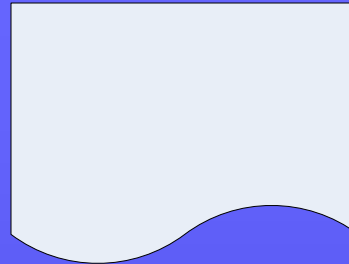
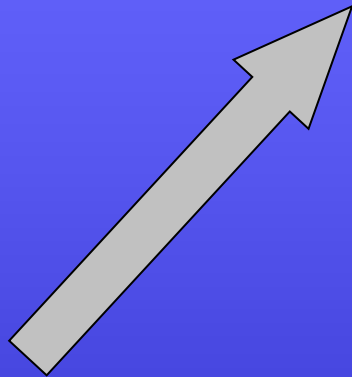
- PeopleTools can create HTML files using iScript.
- MicroSoft Excel (version XP & 2003) can read and write XML files.

The Approach-iScript

People
Tools



iScript

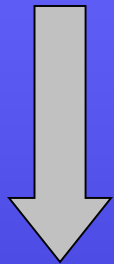


browser

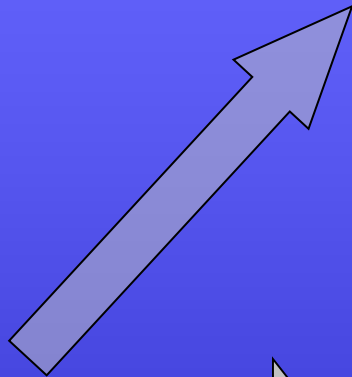


The Approach-Insert XML Logic

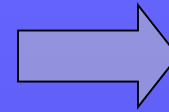
People
Tools



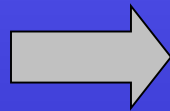
iScript



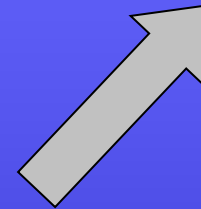
HTML



browser

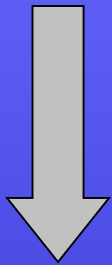


XML

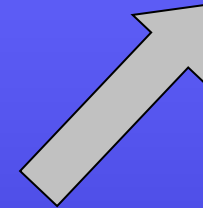
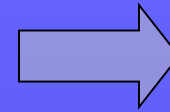
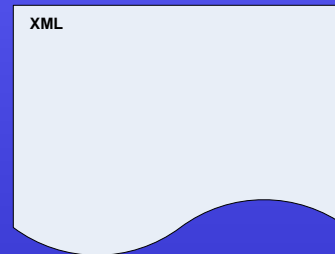
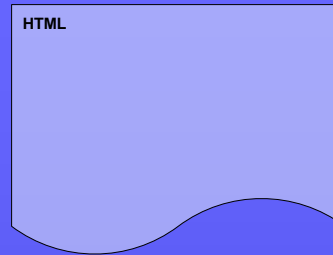
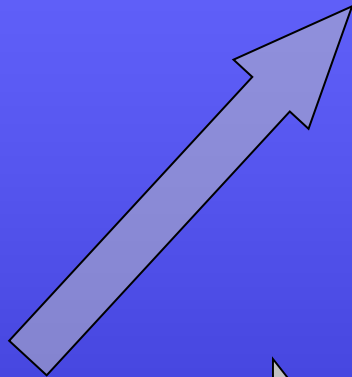


The Approach-Forward to Excel

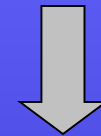
People
Tools



iScript



browser



	A	B
1	Rich Excel	
2	Color	
3	\$ 5,000.00	
4	\$ 11,000.00	
5	\$ 16,000.00	
6	Formulas	
7		

The Solution-XML in Action

Let's see this process in action.

The Solution-Inside the WebLib

Steps:

1. Declare special XML functions.
2. Initialize the XML file (workbook).
3. Create the styles (fonts, color, etc).
4. Initialize the worksheet and columns.
5. Insert a row, then add text, numbers, dates, or formulas.
6. Finalize the worksheet and workbook.

The Solution-App Designer Part 1

```
Function IScript_HEUG();  
    &bu = %Request.GetParameter("bu");  
  
    /*Init the XML File & several  
    variables.*/  
    XML_init_file(0, 0, 0, 0);  
  
    /*Init the default style*/  
    XML_init_style(1);  
    XML_style_font("Arial", 18, 2);
```

The Solution-App Designer Part 2

```
/*Init the XML Worksheet and Columns*/  
XML_init_worksheet("Alliance", 0, 0);  
XML_init_col(1, 0, 100, 0, 0);  
XML_init_col(2, 0, 50, 0, 0);  
XML_init_col(3, 0, 75, 0, 0);  
  
/*Init the first row*/  
XML_init_row(0, 0, 20, 0, 0);  
XML_cell_char(&bu, 0, 1);
```

System Requirements

- Excel Version – Office XP or 2003
- PeopleTools Version 8.1x or higher

Final Thoughts

- This product is best suited for quick reports.
- Try the SQR2XML for larger jobs.
<http://sourceforge.net/projects/sqr2xml>
- Fusion and XML Publisher

What Questions Do You Have?

**This presentation and all Alliance
2006 presentations are available for
download from the Conference
Site.**

Presentations from previous meetings are also available