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Printing vs. Reporting

Overview

It is often a question whether data should be presented to the user by using a custom report in the Reporting framework, or by using the specification print capabilities in GSM. There are advantages to both options, including usability, but a large factor in determining which approach to take will have to do with the complexities in retrieving the data.

In the end, Printing is a good option if the data is already available in the out-of-the-box print models. If all the data is not present, then retrieving the extra data can be challenging. Minor additions may be acceptable. We recommend for larger changes, such as pulling in other specifications or objects, should be performed as a custom report.

Printing

- Initiated directly from a specification with no additional parameters. The intent is to report on details of the viewed specification only. Customizations can be made to the print layout by altering the XSL/XSL:FO. See the *Oracle Agile Product Lifecycle Management for Process Print Extensibility Guide* for more information.
- With printing, data objects are mapped to XML through a model. If the resulting XML does not contain all the data required, minor updates can be made to the model as described in the *Oracle Agile Product Lifecycle for Management for Process Print Extensibility Guide*. Updating the print models requires significant knowledge of the underlying data objects and therefore is not recommended to make significant changes or include data from related specifications.
- Print Managers define the printing flow. The XSL/XSL:FO steps may be omitted by defining a Print Manager that pipes the XML directly to BI Publisher. Print Managers are configured in the PrintSettings.config file which contains a sample configuration for piping the XML directly to BI Publisher.

- A BI Publisher report template will need to be created to consume the XML. The various output types (PDF, XLS, RTF, etc.) would be available based on the template created.

Custom Reporting

- Initiated from the Reporting module (RPT) and optionally from the specification through contextual reporting. This framework provides the ability to report across the entire database. The user can select filters and custom SQL is executed to retrieve the desired results.
- Configure report parameters that utilize available selection controls: EQT searches, single and multi-select lists, dates, free text.
- Use the CustomerReportExtensions.xml file to configure parameters and report links directly to BI Publisher report templates. Parameter selections will be passed to the report templates where direct SQL can be generated to produce the dataset within BI Publisher. See the *Oracle Agile Product Lifecycle Management for Process Custom Report Configuration Guide* included with the Extensibility Pack for more information on configuring custom reports.
- Security must be considered when designing custom reports. By creating direct SQL to the database, the application's built-in security is by-passed. Security must be built-in to the SQL or control user's access to each report through the configurations.

PRINTING/REPORTING SKILLS MATRIX

SKILLS/REQUIRED KNOWLEDGE	PRINTING	REPORTING
XML	Y	
XML Models	Y	
C# for custom handlers	Y	
PLM4P object model	Y	
BI Publisher	Y	Y
PLM4P data schema		Y
SQL		Y



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