

PeopleSoft®

Enterprise PeopleTools 8.45 PeopleBook: Crystal Reports for PeopleSoft

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Enterprise PeopleTools 8.45 PeopleBook: Crystal Reports for PeopleSoft
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Contents

General Preface

- About This PeopleBookv**
- PeopleSoft Application Prerequisites.....v
- PeopleSoft Application Fundamentals.....v
- Related Documentation.....vi
 - Obtaining Documentation Updates.....vi
 - Ordering Printed Documentation.....vi
- Typographical Conventions and Visual Cues.....vii
 - Typographical Conventions.....vii
 - Visual Cues.....viii
 - Country, Region, and Industry Identifiers.....viii
 - Currency Codes.....ix
- Comments and Suggestions.....ix
- Common Elements in These PeopleBooksix

Preface

- Crystal Reports for PeopleSoft Preface.....xi**
- Crystal Reports for PeopleSoft.....xi

Chapter 1

- Getting Started With Crystal Reports for PeopleSoft.....1**
- Crystal Reports for PeopleSoft Overview.....1
- Crystal Reports Integrations.....1
- Crystal Reports Implementation.....1
 - Installing Crystal Reports.....2
 - Creating and Saving Queries in PeopleSoft Query.....2
 - Creating and Saving Report Definitions in Crystal Reports.....2
- Other Sources of Information.....2

Chapter 2

- Using Crystal Reports.....5**
- Understanding Crystal Compatibility Issues.....5

Configuring Crystal Reports.....6
 Specifying Crystal/Business Interlink Options.....6
 Specifying the Path for Production Crystal Reports.....7
 Running Client Setup.....8
 Logging into a PeopleSoft Database.....10
 Creating and Formatting Crystal Reports.....10
 Creating Crystal Reports.....10
 Formatting Crystal Reports.....11
 Printing Reports.....12
 Modifying Crystal Reports Defaults.....12
 Running Crystal Reports.....13
 Running Crystal Reports From PeopleSoft Process Scheduler.....14
 Running Standard Reports From Within Crystal Reports16
 Launching Crystal Reports With PeopleSoft Query.....17
 Working with Multiple Languages.....18
 Understanding Data Returned by the Report.....18
 Understanding Report Layout and Boilerplate Text.....18
 Understanding Crystal Reports Designer/Runtime Language Versions.....19
 Understanding the Language Parameter for PSCRRUN.EXE.....21
 Understanding the Customization of Crystal Reports for Multilingual Environments.....21
 Understanding the Process of Searching for Translated Reports.....21

Appendix A

Using PeopleTools RPT Conversion Utility.....23
 Converting RPT Files.....23
 Repairing RPT Files.....24

Appendix B

ISO Country and Currency Codes.....27
 ISO Country Codes.....27
 ISO Currency Codes.....36

Glossary of PeopleSoft Terms.....47

Index63

About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page 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 applications are defined in this preface.

PeopleSoft 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 applications.

See *Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications*.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. 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 applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. 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 this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, <https://www.peoplesoft.com/corp/en/login.jsp>

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, 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 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)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

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 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.

See *About These PeopleBooks*, “ISO Country and Currency Codes,” ISO Country Codes.

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.

See Appendix B, “ISO Country and Currency Codes,” ISO Currency Codes.

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 PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These 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.

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).

Process Monitor

Click to access the Process List page, where you can view the status of submitted process requests.

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.

Request ID

An ID that represents a set of selection criteria for a report or process.

User ID

An ID that represents the person who generates a transaction.

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.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.45 PeopleBook: Using PeopleSoft Applications

Crystal Reports for PeopleSoft Preface

This book discusses Crystal Reports for PeopleSoft.

Crystal Reports for PeopleSoft

Crystal Reports for PeopleSoft helps you generate clear and easy-to-read printed reports containing data from your PeopleSoft applications. You can generate standard reports already created and saved in Crystal, or create your own custom reports.

CHAPTER 1

Getting Started With Crystal Reports for PeopleSoft

This chapter provides an overview of Crystal Reports and discusses:

- Crystal Reports integrations.
- Crystal Reports implementation.

Crystal Reports for PeopleSoft Overview

Crystal Reports for PeopleSoft enables you to generate both standard and custom printed reports containing data from your PeopleSoft applications.

Note. Crystal Reports has many more features than are described in this book. See your Crystal Reports documentation for more information. Note that you must have Crystal Reports installed to gain access to this documentation.

See *Crystal Reports documentation*.

Note. Crystal reports in PeopleTools are language-sensitive.

See Chapter 2, “Using Crystal Reports,” Working with Multiple Languages, page 18.

Crystal Reports Integrations

Crystal Reports works in tandem with PeopleSoft Query. You employ Query to extract specified subsets of data from your database. You can then use Crystal Reports to format that data, presenting the information in an easy to understand layout.

Crystal Reports Implementation

Crystal Reports implementation can be divided into the following phases:

- Install Crystal Reports.
- Create and save queries in PeopleSoft Query.

- Create and save report definitions in Crystal Reports.

Installing Crystal Reports

You need to install Crystal Reports, which is packaged with PeopleSoft, if you want to design new Crystal reports.

Note. If you are simply using the Process Scheduler server to run existing Crystal reports, you do not have to install Crystal Reports. All necessary files are installed automatically when you boot the Process Scheduler server. For the most part, this book assumes that you have Crystal Reports installed.

Step	Reference
1. Install Crystal Reports for PeopleSoft on your PeopleTools Development Environment (a Windows-based workstation).	<i>The PeopleTools Installation guide for your database platform.</i>

Creating and Saving Queries in PeopleSoft Query

Before you can generate formatted output in Crystal, you need to create and save queries in PeopleSoft Query.

Step	Reference
1. Create and save a query to extract a selected subset of your data.	See <i>Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Query</i> .

Creating and Saving Report Definitions in Crystal Reports

After you've generated and saved queries, you can create report definitions in Crystal to format the fields (columns) used in the queries.

Step	Reference
1. Create the report definition.	See Chapter 2, "Using Crystal Reports," Creating and Formatting Crystal Reports, page 10.
2. Save the report definition.	See Chapter 2, "Using Crystal Reports," Creating and Formatting Crystal Reports, page 10.
3. Run the report.	See Chapter 2, "Using Crystal Reports," Running Crystal Reports, page 13.

Note. Crystal report definitions do not usually contain actual data from your database, so each time you use the reports, PeopleSoft Query retrieves the most recent data. This ensures that your printed reports always contain up-to-date information. However, if you want to track changes over time, you can choose to save data with a report.

Other Sources of Information

This section provides information to consider before you begin to use Crystal Reports for PeopleSoft.

Take advantage of all PeopleSoft sources of information, including the installation guides, release notes, PeopleBooks, red papers, the Updates + Fixes area of Customer Connection, and PeopleSoft's curriculum courses.

See Also

"Crystal Reports for PeopleSoft Preface," page xi

Enterprise PeopleTools 8.45 PeopleBook: Getting Started with Enterprise PeopleTools

CHAPTER 2

Using Crystal Reports

This chapter provides information about compatibility issues and describes how to:

- Configure Crystal Reports.
- Create and format Crystal reports.
- Run Crystal reports.
- Work with multiple languages.

Understanding Crystal Compatibility Issues

Please be aware of the following compatibility issues when upgrading to Crystal Reports version 9:

- Crystal 9 can run any report saved in the Crystal 8.5 format. When you run a version 8.5 report in the Crystal 9 application or through the PeopleSoft Process Scheduler, the Crystal Reports application runs the Verify Database function, which picks up any errors in the report such as missing fields. If such errors are detected, you need to fix the report before you can run it successfully.
- When you run reports using the Process Scheduler in the PeopleSoft Pure Internet Architecture, they are created in the Crystal 9 .rpt format and you cannot open them using Crystal 8.5. You can use Crystal 8.5 report templates to generate reports; however, to ensure compatibility, PeopleSoft recommends creating the reports in the Crystal 9 format, and then, if needed, converting them to the 8.5 format using the PeopleTools RPT Conversion utility discussed later in this book.

See [Appendix A, “Using PeopleTools RPT Conversion Utility,” page 23](#).

- You should not install Crystal 8.5 on the same machine as the Process Scheduler.
- When exporting a query from PeopleSoft Query to Crystal or launching the report converter with a version of the Crystal print engine that is earlier than version 9, you will receive the following message: *Wrong version of CRPE32.DLL found. Please perform a Workstation Installation from the Configuration Manager.*
- Crystal 9 can be more particular than Crystal 8.5 about null values being passed to its in-built functions. To prevent errors occurring in formulas, check that the values you are passing are not null. For example, instead of

```
compare = toText({CUSTOMER_SALES.END_DATE});
```

```
Use
if (IsNull({CUSTOMER_SALES.END_DATE})) then
chooseDate := "";
else
chooseDate := {CUSTOMER_SALES.END_DATE};
```

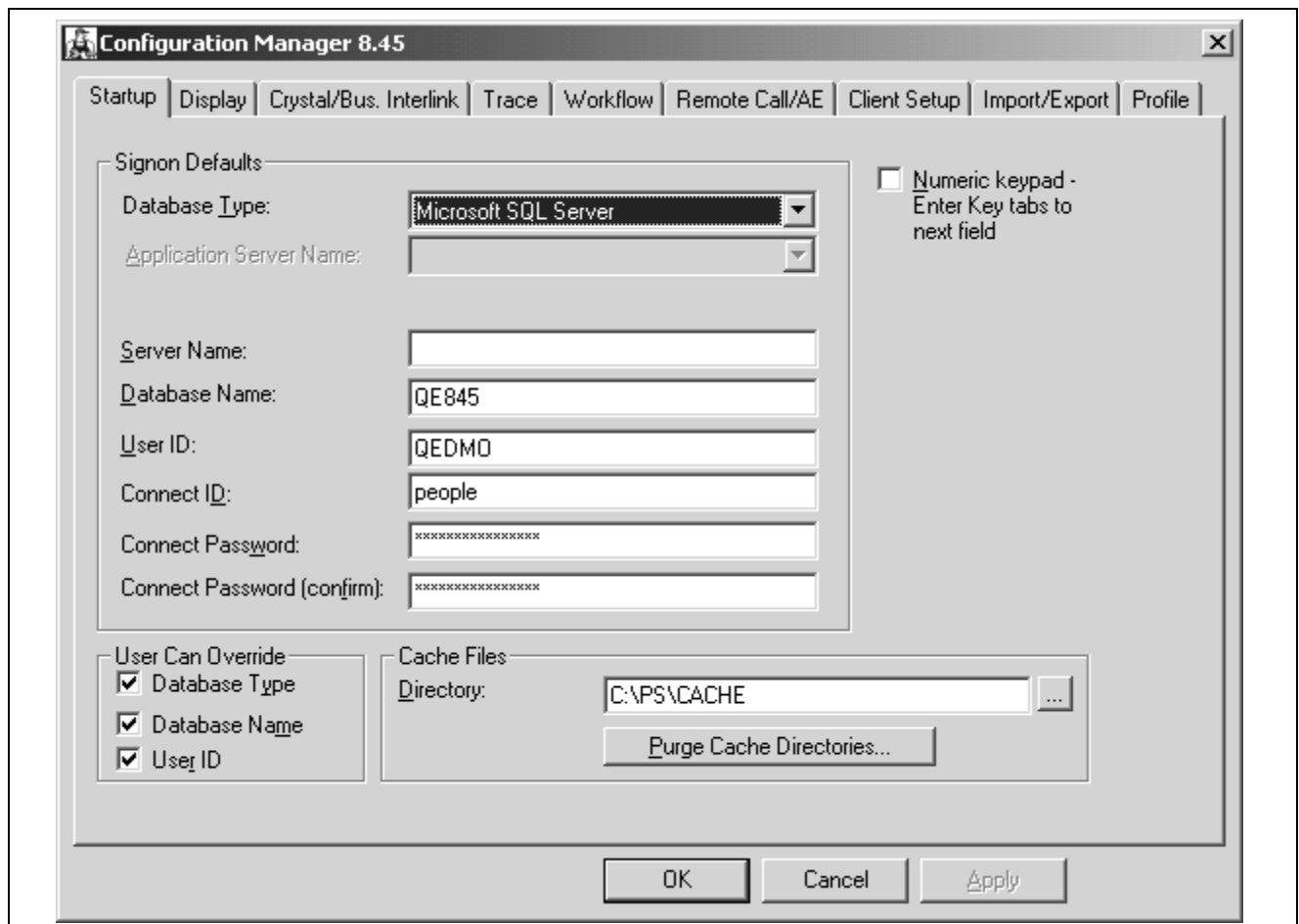
Configuring Crystal Reports

This section describes how to:

- Specify Crystal/Business Interlink options.
- Specify the path for production Crystal reports.
- Run Client Setup.
- Log in to a PeopleSoft Database.

Note. These configuration options are relevant only if you have installed Crystal Reports.

Select Start, Programs, PeopleTools 8.4, Configuration Manager to access PeopleTools Configuration Manager. Alternately, you can go to <PS_HOME>\bin\client\winx86\ and launch pscfg.exe.



Configuration Manager dialog box

Specifying Crystal/Business Interlink Options

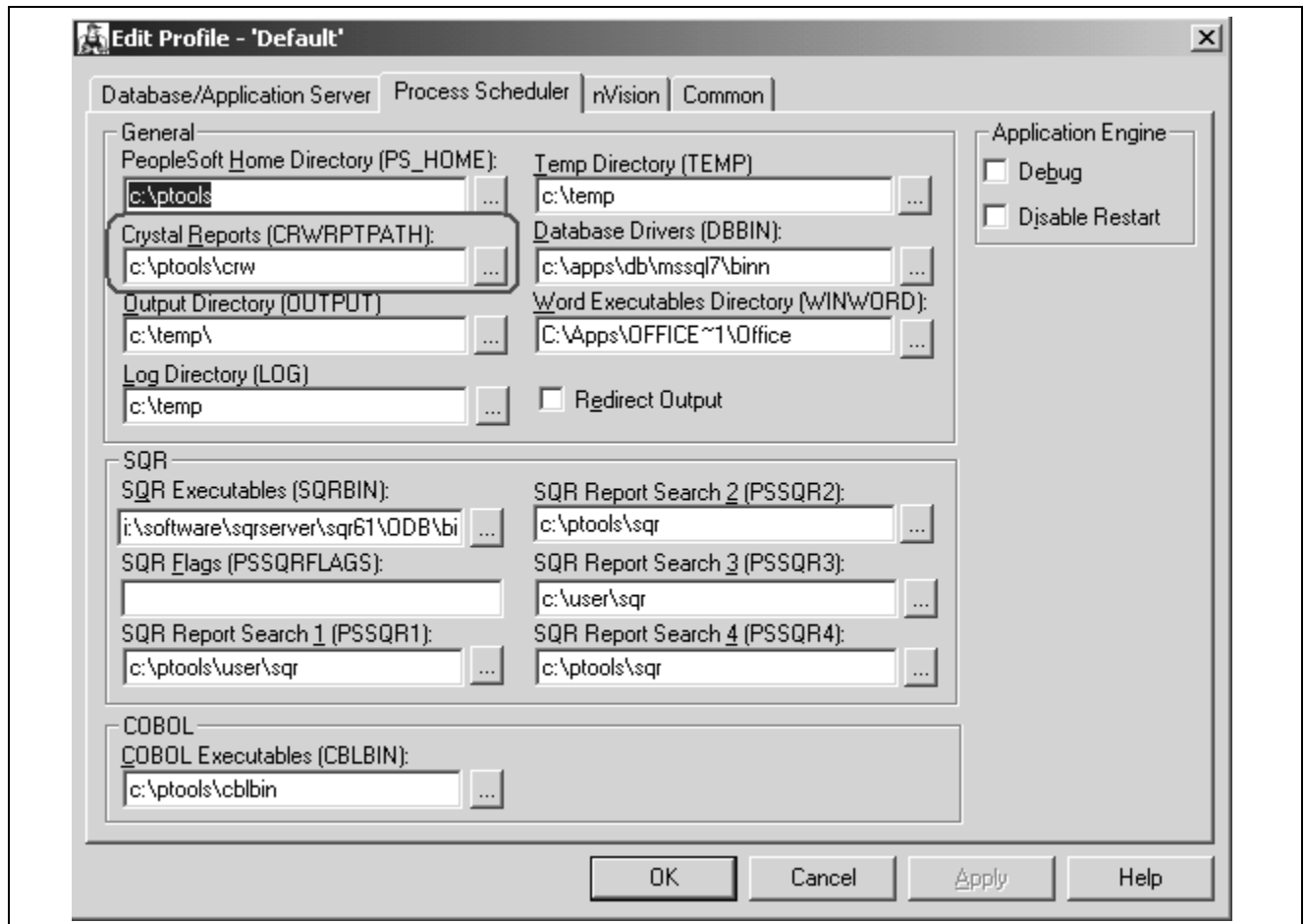
Use the Crystal/Bus. Interlink tab to specify the locations of Crystal Reports executables and default location for Crystal Reports generated via PeopleSoft Query; the latter must be a directory to which the user has write access. This tab also lets you specify the location of Business Interlink drivers.

Crystal EXEs Path	If you have Crystal installed locally on the workstation, the Crystal EXEs Path will be populated automatically. But, if you have Crystal installed on a network drive, set the Crystal EXEs Path parameter to reflect the location of the Crystal Reports executables. For example: <i>n:\hr880\bin\client\winx86\crystal</i>
Default Crystal Reports	Because you can create customized reports with Crystal, the Default Crystal Reports option allows you to specify the default location of such reports. If this option does not apply to your site's Crystal implementation, you can disregard this parameter.
	<hr/> Note. If you are creating a Crystal report from PeopleSoft Query and this path is invalid, you will see an error message. If a path is not specified, PeopleSoft Query tries to write the file to your language directory beneath the directory containing Crystal Reports (CRWRPTPATH). <hr/>
Use trace during execution	When this option is selected, Crystal writes the trace statements to a log file that you specify in Trace File field. This file is written to the workstation's %TEMP% directory by default.
	<hr/> Note. When you are tracing Crystal reports through the Process Scheduler, edit the settings in the Crystal section of the psprcs.cfg configuration file. (This file lives under <PS_HOME>/appserv/prcs/<dbname> for UNIX and under <PS_HOME>\appserv\prcs\<dbname> for Windows.) Change <i>Trace=YES</i> and specify a location for <i>TraceFile</i> , supplying a full path and file name. <hr/>

Specifying the Path for Production Crystal Reports

In the Configuration Manager, select the Profile tab, select a profile to edit, and then select the Process Scheduler tab.

See *Enterprise PeopleTools 8.45 PeopleBook: System and Server Administration*, "Using PeopleSoft Configuration Manager," Configuring User Profiles.



Configuration Manager - Process Scheduler Settings

In the Crystal Reports [CRWRPTPATH] field, enter the path to your Crystal production reports.

Note. CRWRPTPATH is a read-only directory intended to hold production reports.

See Also

[Chapter 2, “Using Crystal Reports,” Understanding the Customization of Crystal Reports for Multilingual Environments, page 21](#)

[Chapter 2, “Using Crystal Reports,” Understanding the Process of Searching for Translated Reports, page 21](#)

Running Client Setup

If you’ve installed Crystal Reports on your Windows-based development workstation, you need to use Configuration Manager’s Client Setup tab to configure your workstation to run successfully with your PeopleSoft system.

Note. Keep in mind that the Client Setup tab is not the only tab that contains essential values for the PeopleSoft workstation. You should make sure that all of the tabs reflect the correct values for your site, especially the Process Scheduler tab for the Default profile.

The Client Setup tab does the following:

- Installs a PeopleSoft program group on the workstation.
- Sets up a system data source name (DSN) using the server and database name information from the Startup tab.
- Installs the PeopleSoft ODBC driver required for Open Query and Crystal Reports.

Note. You can run two copies of the same version of PeopleTools on the same machine; however, we only support one version of the PeopleSoft ODBC driver on the same machine. This means that you cannot have PeopleTools 7.5 and PeopleTools 8 on the same machine and expect Crystal Reports to work with both PeopleTools builds. For instance, you cannot get PeopleTools 7.5 Crystal Reports to work with the PeopleTools 8.x PS ODBC driver.

- Installs Crystal Reports runtime .dlls on the workstation.
- Configures a PeopleSoft ODBC data source name.

Important! These Client Setup functions are performed when you click OK or Apply on Configuration Manager only if the Install Workstation check box on the Client Setup tab is selected.

Note. Any files installed by Client Setup on the workstation from the file server, including ODBC driver files, use the paths specified in the default profile.

To run Client Setup:

1. In the Configuration Manager, select the Client Setup tab.
2. In the Group Title text box, enter the name of the program group for the icons you want on the client workstation.
You can call the program group anything you want, but this book refers to it by its default name, *PeopleSoft 8*.
3. Select check boxes to create shortcut links for any PeopleSoft applications that you wish to access from the workstation.
When you run Client Setup, it uninstalls any existing shortcuts in the PeopleSoft 8 program group, and installs shortcuts for the applications that you have selected. If you subsequently want to install or uninstall shortcuts, you can always rerun Client Setup.
4. Select the Install PeopleSoft ODBC Driver check box if you wish to install the PeopleSoft ODBC driver and set up a user ODBC data source name required by PeopleSoft Open Query and by Crystal Reports.
 - You can click ODBC Administrator to directly access the Microsoft ODBC Administrator to verify the installation and configuration of the ODBC DSN.
 - If you install the ODBC Driver Manager 3.5, reboot the workstation after running Client Setup.
5. Select the Install Workstation check box.
This check box determines whether Client Setup runs when you click Apply or OK in Configuration Manager. If this box is not selected, Client Setup will create or update settings in the registry, but it will not set up the PeopleSoft 8 program group or install local .dlls.
6. Click Apply to run Client Setup and apply the other Configuration Manager settings.
7. To view a list of the files installed and actions taken by Client Setup, you can open the psinstal.log file in your TEMP directory.

Logging into a PeopleSoft Database

You must log in to a PeopleSoft database before you can generate a PeopleSoft report from Crystal Reports. When you open Crystal Reports and create a new report, Crystal prompts you to log into a PeopleSoft database using Crystal's login dialog. When you run a preexisting report, you log into a PeopleSoft database using PeopleSoft's login dialog. After successfully logging in to a database, you have full reporting flexibility.

Creating and Formatting Crystal Reports

This section describes how to:

- Create Crystal Reports.
- Format Crystal Reports.
- Print reports.
- Modify Crystal Reports defaults.

Creating Crystal Reports

To create a new report using Crystal:

1. Select Start, Programs, Crystal Reports 9 to display the Welcome to Crystal Reports window.
2. Click the Using the Report Wizard radio button.

The Report Wizard guides you through the creation of a typical report.

3. Click the OK button.

You will see the Crystal Reports Gallery dialog.

4. Click the OK button to select the Standard wizard.

The Standard Report Creation dialog appears.

5. Click the + sign to the left of the Create New Connection folder to display its contents.
6. Click the + sign to the left of the ODBC (RDO) folder.

The ODBC (RDO) dialog box appears.

7. Select *PeopleSoft PeopleTools* as the data source name.

Note. When logging into two-tier, make sure that the *Server Name* and other three-tier fields are not populated in the PeopleSoft PeopleTools DSN. These will be picked up as defaults for the connection information you enter them.

8. Click Finish.

The PeopleSoft Signon screen appears.

9. Enter the Database Name, User ID, and Password, and click OK.

10. If needed, click the + sign to the left of the PeopleSoft PeopleTools folder under ODBC (RDO), and then click the + sign to the left of QUERY to display a list of queries.

The list contains all the queries from which you can create a report.

11. Highlight a query from the list and click the > button.

The query you selected appears in the Selected Tables group box, indicating that it has been added.

12. You can select additional queries if necessary. When you have completed your selections, click the Next button to navigate to the Fields dialog.

Note. If you have selected multiple queries, clicking Next at this point takes you to the Link dialog box.

13. Highlight one or more fields and click the > button, or click the >> button to add all the fields from the query that you want to appear on your report.

When fields have been added, the < and << buttons become active.

14. (Optional). Click the Next button and select from the following dialog boxes:

- **Grouping:** Sort records by their values on the Group By fields.
- **Record Selection:** Select a subset of information. The data can be filtered so that only a subset appears on the report.
- **Template:** Select a template for the report.

15. Click Finish and click the Design tab or Preview tab to format your report.

Formatting Crystal Reports

To format a new report using Crystal Reports:

1. With the new report on screen, click the Design tab.
2. Enter the appropriate values:

Note. In most cases, you need to enter the appropriate field type (text field, and so on) before you can enter information.

- **Report Header:** Enter the title of the report and other information that you want to appear at the top of the first page.
 - **Page Header:** Enter or modify the column headings and other identifying information that you want displayed at the top of each page.
 - **Details:** This is main section of the report, where the rows of data from your database will appear.
 - **Report Footer:** Enter information that you would like in the footer of the report. You can include a summary on the last page of your report.
 - **Page Footer:** Enter a page number or other information that you want displayed at the bottom of the page.
3. Click the Preview tab to preview your report.

The page orientation defaults to portrait or landscape according to the number and width of the columns in your query. If the query columns will not fit in landscape, Crystal displays as many columns as fit on the page and does not display the others.

You can make any adjustments to the formatting, such as resizing headings, from within the print preview window. For example, if the report title is not centered properly, you can move it. You can click the Design tab to return to the report template.

4. Click the Refresh button to refresh your data after making changes.
5. Click the Save button to save your report.

Important! If your reports contain numeric fields that are formatted to have single- or double-line borders at the top of the container, you may experience incorrect justification of numbers in the HTML output. To resolve this issue, either draw lines above the numeric fields using the line drawing tool, or insert summary fields into a blank text object and then format the container text object to include borders above the text.

See *Crystal Reports documentation*.

Printing Reports

After saving the file, you can print the report by clicking the Print button or selecting File, Print, Printer. As with many Microsoft Windows applications, you can choose to print the entire report or only a few pages, specify the number of copies to print, and indicate whether you want the copies collated.

Note. To run your report directly from PeopleSoft Query, the query and report names must match in order to use the formatting you have just created in Crystal Reports every time you print the report. If you always update and print the report from within Crystal Reports, it does not matter.

Note. If you print reports using the PeopleSoft Process Scheduler, you must define the appropriate paper size in the Crystal process type definition.

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler*, “Defining PeopleSoft Process Scheduler Support Information,” Entering Global Definitions for Processes.

To print HTML reports from Crystal, open the appropriate HTML file and print it from the browser. Crystal uses the default page setting to print the report. Sometimes, the right side of the report will be cut off when it is sent to the printer, even though it appears in the Crystal Report viewer.

To change your default page settings to print HTML reports:

1. Select File, Page Setup.
2. Change the left and right margin settings to create smaller margins.

Modifying Crystal Reports Defaults

You can set a number of different defaults in Crystal Reports.

Note. If you modify a query to include additional fields, you need to modify the report definition in Crystal to include the new fields in your report. To modify the definition, select Database, Verify Database.

Changing Crystal Default Column Headings and Report Titles

To edit column headings:

1. Click the Design tab and, in the Page Header section, double-click the heading that you want to change. (You can also click the text object and select Edit, Edit Text.)

A ruler appears above the text object, and a hatched box appears around the text. The Crystal text formatting features (such as font, bold, italics, and so on) are available in this mode.

2. Edit the column heading text, and then click a blank area of the report to deselect the text object.

The system displays the new column heading in the display window.

Note. You can make the column headings as long as you like. However, if you make them much longer than the current heading, you will need to enlarge the text box to fit the heading.

Changing Fonts

To change font attributes:

1. Make sure that the item is selected and select Format, Format Text.
The Format Editor dialog box appears.
2. Click the Font tab.
3. Choose the font, style, size, and color that you like.

Adding a Print Date Field

To add a print date field:

1. If Field Explorer is not already displayed, select View, Field Explorer to display it.
2. If necessary, click the + to the left of Special Fields.
3. Drag the Print Date field from the Field Explorer to the appropriate area of the report.

A box with Print Date appears where you dragged.

To modify the format of the Print Date field, right-click the date box and select Format Field.

Running Crystal Reports

This section discusses how to:

- Run Crystal Reports from PeopleSoft Process Scheduler.
- Run standard reports from within Crystal Reports.
- Launch Crystal Reports with PeopleSoft Query.

Note. If you have access to the Windows version of Query Designer—that is, if you have a Windows-based workstation set up as a PeopleTools development environment—you can run queries directly to Crystal Reports from Query Designer. This option is not available from web-based Query Manager or Query Viewer. However, users who do not have access to Windows Query Designer can schedule a predefined Crystal Report to run on a Process Scheduler server, and the results can be routed to PeopleSoft Report Manager.

Note. If you want to run Crystal jobs in background mode, you need to update some values in the system registry. See the red paper “PS/nVision in the PeopleSoft Internet Architecture” on Customer Connection for the details. The section “Running Multi-Concurrent PS/nVision Reports” covers system settings that are relevant to all programs that you can run in the background—including nVision and Crystal.

Running Crystal Reports From PeopleSoft Process Scheduler

If you submit a process request, you can run the report on a client workstation or on a Windows server without having to exit the PeopleSoft system or use a third-party scheduling program. If you schedule processes to run on a Windows server, you can run the report at a future date and time.

When Crystal reports are run through Process Scheduler, you can either:

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler*, “Submitting and Scheduling Process Requests”.

- Specify an output file name.
- Use the default file name.

The default file name is the report name concatenated with the process instance; this name guarantees uniqueness. You can also tie the default name to information about the process that generated the output by using process instance as the key to the process request table.

Note. You cannot run alias Crystal reports—either from the Crystal Reports application or from Process Scheduler—if the alias name contains certain characters. If your alias Crystal report will not run, check the *InvalidAliasCharList* entry above the following directory of the registry: *HKEY_LOCAL_MACHINE\Software\Crystal Decisions\9.0\Crystal Reports\Database*. If any of the characters in your alias tablename are listed in the entry, either change these characters to characters that are not listed in the entry or change the entry to remove any characters that you want to be able to include in your alias tablename. Please note that the entry must contain at least one character.

Note. When running Crystal reports through Process Scheduler, you are prompted for parameters if the PeopleSoft ODBC driver for the version of PeopleTools that you are running is not installed.

Note. If you use Process Scheduler to run a report, and select the File/XLS option, you may find that the totals do not align with the detail columns that the totals represent. If so, you can address these alignment issues by following the guidelines provided in the document “Exporting to Microsoft Excel.”

See “Exporting to Microsoft Excel” <http://www.businessobjects.com>

Runtime Prompts

When you are running a Crystal report that has runtime prompts in PeopleSoft Pure Internet Architecture (PIA), the prompt values need to be passed in via the Command Line. You can do this either by hard-coding static values in the Process Definition page, or by creating a PIA page to gather values from the users and dynamically pass them into the Command Line.

Note. The number and order of the prompt values must be exact.

For example, if you have a report whose query prompts on Business Unit, and you only want the report to run for Business Unit BU001, you could hard-code that prompt value into the Process Definition in quotes:

Process& Definition	Process Definition Options	Override Options	Destination
Process Type:		Crystal	
Name:		Employees By Department for BU001	
Override Options			
		Parameters	
Parameter List*:	Append	-ORIENTL "BU001"	
Command Line*:	None		
Working Directory*:	None		

PeopleSoft Process Scheduler - Process Definition - Override Options page

The resulting Command Line would look similar to this:

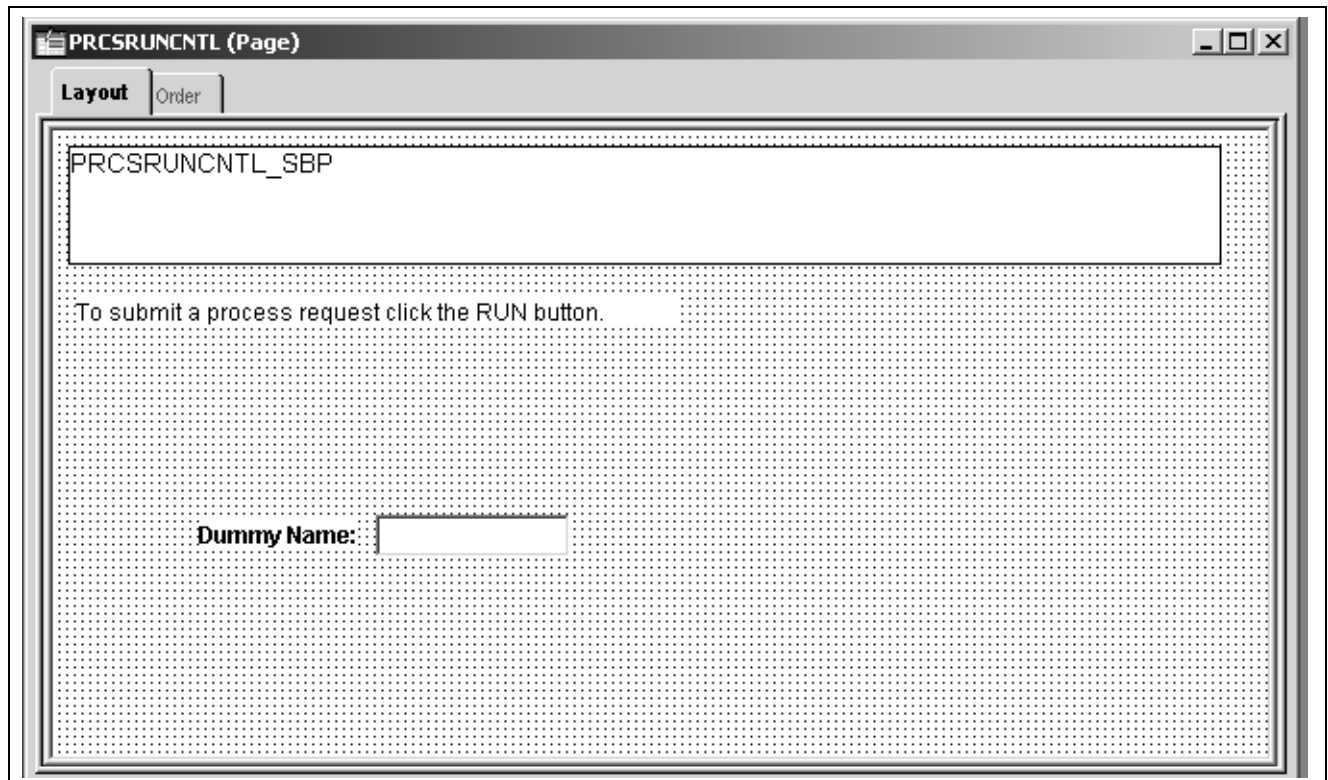
```
C:\PT845\BIN\CLIENT\WINX86\PSCRRUN.EXE -CTMICROSFT -CDPT845 -COUSER1
-CPOPRPSWD -I45 -RP"Employees by Department for BU001" -OT5
-OPDistribution List -LGENG -OF8 -ORIENTL "BU001"
```

To allow users to dynamically select prompt values at runtime:

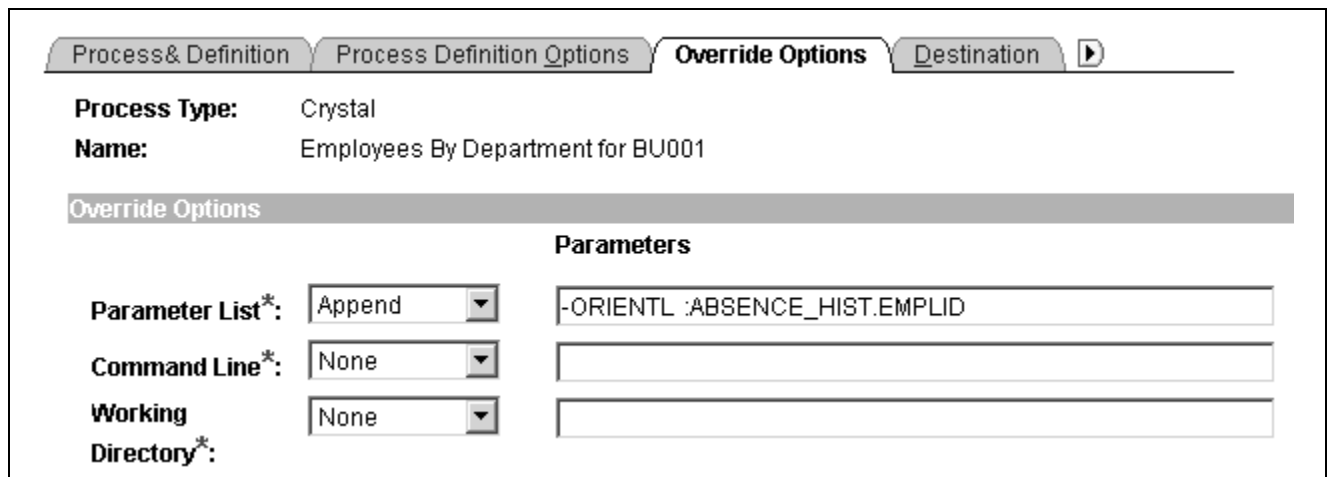
1. Using PeopleSoft Application Designer, create a PIA Run Control page.
See Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer.
2. Insert an edit box for each prompt field.
3. Click the newly inserted edit box to display the Edit Box Properties dialog box.
4. Use the drop-down list boxes to select the record and field you are prompting on.
5. Save your changes.
6. Go to Process Scheduler and modify the process definition parameter list to include your prompt field using the format `:RECORD.FIELD`

See Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler.

Note. The resulting command line would look the same as above except, instead of `BU001` it would contain the selected value.



Example PeopleSoft Application Designer - Run Control page



Example Process Definition - Override Options page

Running Standard Reports From Within Crystal Reports

To run standard reports from within Crystal Reports, the system uses a query created in PeopleSoft Query and a report definition created in Crystal. All the elements are predefined—all you do is view and print the reports.

To run a standard report:

1. Select Start, Programs, Crystal Reports 9.
The Welcome to Crystal Reports dialog box appears.
2. Choose the Open an Existing Report option, if it is not already selected.

Crystal displays a list of report files, which use the .rpt file extension.

3. Double-click the name of the report you want to open, or highlight it and click OK.

Crystal opens the selected report template and displays it as it is formatted for printing.

4. Select File, Print Preview or click the Print Preview button on the Crystal Reports toolbar to view the report before you print.

Once you have logged in to your database, Crystal Reports displays a print preview containing the rows of data that will appear in the printed report. You can perform the following actions:

- To refresh the data and ensure that you see the most current information, click the Refresh button on the Crystal toolbar or select Report, Refresh Report Data.
- If you need to, adjust the fields and objects in the report so that the report prints properly on your printer.
- To print the report, select File, Print, Printer or click the Print button on the Crystal toolbar. Select the desired options in the Print dialog box and click OK.

Launching Crystal Reports With PeopleSoft Query

You can export queries to Crystal to create default reports. Default Crystal reports are generated in the following ways:

- When you create a default Crystal report from PeopleSoft Query, Query creates a report using the file name (ACTQRY).RPT. Query uses the selected column list to define the content of the default Crystal report.
- When you create a default report from a new or *unnamed* query object, PeopleSoft Query uses the in-memory selected column list to generate the default Crystal report.
- When you create a default Crystal report from a *named* query object, the saved representation of the selected column list is used to generate the default Crystal report.

If you want to run your report directly from PeopleSoft Query, the query and report names must match in order to use the formatting you have created in Crystal Reports every time you print the report. If you always update and print the report from within Crystal Reports, it does not matter.

Note. End users should create and maintain reports in Crystal. PeopleSoft Query is used to create and maintain the queries that generate report contents.

To run a query with Crystal Reports output:

1. Launch Application Designer, and then select Go, Query.
2. Select File, Open or click the Open Query button to display the Open Query dialog box.
3. Click the down arrow to the right of the Name box to display a list of existing queries.
4. Highlight the name of the query that you want to base the report on and click OK.

If none of the saved queries meets your needs, you can create a new query.

5. Click the Run Query button to run the query.
6. Click the Run to Crystal Report button to run the query to Crystal Reports.

The system automatically opens the Crystal Reports application and creates a new Crystal report.

7. Use Crystal Reports to format your data, add a report title, modify column headings, and so on.

Repeated Query Prompts

PeopleSoft Query cannot supply values to Crystal at runtime. Crystal stores the default values as NULLs and does not allow you to change stored procedure values, so you must enter the prompt values twice.

When queries include prompts, you will be prompted once at design time and once at runtime to enter the appropriate values. This behavior is related to the definition of a stored procedure.

Most databases can return any number of result-set columns based solely on the input to a stored procedure. For Crystal to create a static report template, it must execute the stored procedure with the default parameter values once before it can request the definition of the result set. Because of this, the stored procedure (the query) is executed once at design time (to fill in the result set descriptions) and again at runtime (as expected).

Note. You should also expect to be prompted when verifying the database in the report. The issue is the same as the design-time prompt followed by the runtime prompt issue just described. Fill in the appropriate values after choosing to verify the database.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Query, “Creating and Running Simple Queries”

Working with Multiple Languages

This section discusses how to:

- Understand data returned by the report.
- Understand report layout and boilerplate text.
- Understand Crystal Reports Designer/Runtime language versions.
- Understand the language parameter for pscrrun.exe.
- Understand the customization of Crystal Reports for multilingual environments.
- Understand the process of searching for translated reports.

Understanding Data Returned by the Report

Data returned by Crystal Reports is fetched from the database using PeopleSoft Query, and therefore is already language-sensitive due to the automatic joining to related language tables that PeopleSoft Query performs. No special logic is required to ensure that appropriate descriptions from related language tables are returned in Crystal Report output.

Understanding Report Layout and Boilerplate Text

The Crystal Reports .rpt file contains the layout of the report and any text that is hard-coded into the layout, such as column headings, headers, and footers. Because Crystal Reports does not provide any ability to maintain multiple translations of this boilerplate text in a single .rpt file, you must maintain separate copies of the report layout for each language.

On the file and report servers, PeopleTools maintains separate directories within the <PS_HOME>\CRW directory that correspond to the language codes available for your PeopleSoft implementation. Each directory contains the appropriate report in the specified language, if the report has been translated. PeopleTools tries to read the report from the directory that corresponds to the user's preferred language. If it cannot find the report there, Crystal uses the report in the base language directory <PS_HOME>\CRW. Finally, if the report is not in the directory corresponding to the user's current language or in the base directory, PeopleTools uses the copy of the report in the <PS_HOME>\CRW\ENG directory.

Understanding Crystal Reports Designer/Runtime Language Versions

The Crystal Reports product is available in several different language editions. PeopleSoft ships the appropriate edition of Crystal Reports based on the languages you license from PeopleSoft. Each language version of Crystal Reports is functionally identical, the primary difference being the language of the Crystal Reports Designer user interface. You do not need to match the language of the Crystal Reports design or runtime engine to the language of the report you are creating unless you are using Crystal's *ToWords* function. This limitation can be overcome by using the *PSToWords* or *PSToWordsLoc* functions.

Using PSToWords and PSToWordsLoc

PSToWords and *PSToWordsLoc* are similar to Crystal's *ToWords* function in that they convert a numerical amount into a textual representation of that amount, as you see on checks. But unlike *ToWords*, these functions are independent of the installed language of Crystal Reports Designer. After configuring the location of the supporting .dlls, these functions appear in Crystal's Function Editor as new Additional Functions.

Configuring Crystal Reports Designer to Use PSToWords

PSToWords and *PSToWordsLoc* functionality is contained in three files called *psicuuc22.dll*, *psicudt22.dll*, and *psicuin22.dll*, which are located in your <PS_HOME>\bin\client\winx86 directory. To use these functions in Crystal Reports Designer, you need to either add the location of these .dll files to your PATH environment variable so that Crystal Reports can find and load them, or else copy them to your local directory where *crw32.exe* is installed, by default C:\Program Files\Crystal Decisions\Crystal Reports 9. For Process Scheduler to use these functions in a scheduled report, you do not need to configure anything, because <PS_HOME>\bin\client\winx86 is the current directory for the Process Scheduler.

You can type *PSToWords* or *PSToWordsLoc* directly in the Function Editor, or choose them from the list of Additional Functions in the Function Editor of the Crystal Reports 9 Designer. To confirm that the .dlls are loaded in Crystal Designer, navigate to Help, About, More Info, and check that the three *psicu* files are listed.

Syntax for PSToWords and PSToWordsLoc

The syntax for *PSToWords* is `PSToWords(number, places)`, where *number* is a numeric amount and *places* is the number of decimal places or precision to print. For instance, `PSToWords(12.345, 2)` prints *twelve and 35 / 100*.

The syntax for *PSToWordsLoc* is `PSToWordsLoc(locale, number, places)`, where the *locale* parameter specifies an ISO language or locale code. For examples of ISO locales used in PeopleSoft, see the cross references below. For instance, `PSToWordsLoc("es", 12.345, 2)` prints *doce y 35 / 100*.

See *Enterprise PeopleTools 8.45 PeopleBook: Global Technology*, "Adding New Languages," Determining PeopleSoft and ISO Codes for Your Language.

See *Enterprise PeopleTools 8.45 PeopleBook: Global Technology*, "Controlling International Preferences," Using Browser Language Settings to Determine the Sign-in Language.

Converting Entities to Characters

Crystal Reports 9 is Unicode-enabled, except in API function calls. To work around this limitation, *PSToWords* and *PSToWordsLoc* return any non-USASCII characters as HTML decimal entities. To convert these entities to Unicode characters, you need to include a report custom function in your .rpt file. In Crystal Reports Designer Formula Workshop, create a new Report Custom Function called *PSToUChar* and paste in the following code:

```
Function (StringVar instring)
    local StringVar outstring := "";
    local NumberVar i;
    local StringVar curtoken;
    local NumberVar toklen;
    local StringVar widechar;

    //Convert Entities to ChrW

    for i := 1 to (Length(instring)) Do
    (
        curtoken := mid(instring,i,2);
        toklen := instr(i+2,instring,";")-(i+2);

        if curtoken = "&#" then widechar := chrw(val(mid(instring,i+2,toklen)));
        if curtoken = "&#" then outstring := outstring + widechar;
        if curtoken = "&#" then i:=i+toklen+2;

        if curtoken <> "&#" then outstring := outstring + mid(instring,i,1);
    );
    outstring;
```

A report-defined function enables you to define a function to be saved within the .rpt file. The syntax for this function is

```
PSToUChar(PSToWords(number,places))
```

or

```
PSToUChar(PSToWordsLoc(locale,number,places))
```

Limitations

The largest number converted to words is 999,999,999.999 for most languages. Numbers higher than that amount, or where the encoded string of words would exceed 254 bytes, will be displayed in digits rather than in words.

Because Thai words for numbers often exceed the 254-byte limit when encoded as entities, you can use the special locale *x-th* instead of *th* to return the Thai characters without encoding them as entities. This allows for a longer string to be processed but requires a server with a system default locale set to Thai. The syntax for Thai processed in this fashion would be `ToWordsLoc("x-th", number, places)`.

Understanding the Language Parameter for PSCRRUN.EXE

PeopleSoft Process Scheduler uses the `psccrun.exe` process to execute Crystal Reports. The process's language code parameter specifies the language directory that `psccrun.exe` uses to fully qualify the report path. Unlike Structured Query Reports (SQRs), `psccrun.exe` searches for a separate Crystal Report file for each translation of the report. The language directory parameters are needed because each language-specific report is stored in a separate language directory. If the report is not found in the language that is specified by the parameter, `psccrun.exe` looks in the default, base-language directory.

Typically, the language parameter is passed to `psccrun.exe` from the run control that is associated with your Crystal Report.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

Understanding the Customization of Crystal Reports for Multilingual Environments

The PeopleSoft system allows you to use a single Crystal Report server for all languages. The following features support this ability:

- Unicode Support

Crystal Reports for PeopleSoft 9 supports Unicode.

- Locale Formatting

Locale formatting is based on the user personalizations of the user scheduling the report and is not based on the formatting set on the report server. If you do not want locale formatting to be based on the user personalizations of the user scheduling the report—for example, if the user wants to preserve the date or time formatting hard-coded in the report file—use the `-LX0` parameter to disable locale processing.

- *ToWords* Function

The *ToWords* function (used in printing checks) is supplemented by *PSToWords*, which can support any PeopleSoft language instead of just the language of the installed version of Crystal Reports.

See Also

[Chapter 2, “Using Crystal Reports,” Understanding Crystal Reports Designer /Runtime Language Versions, page 19](#)

Understanding the Process of Searching for Translated Reports

To call up translated production reports in the correct language, the Crystal Reports for PeopleSoft application performs the following steps, in this order:

- Suppose the `-RP` parameter specifies a path and report name including the `.rpt` extension. If that report exists, the Crystal Reports for PeopleSoft application selects the report. If that report does not exist, the search for the report fails.
- Suppose the `-RP` parameter specifies a path but does not specify the full report name including the `.rpt` extension. Then Crystal should look for translated reports based on the path in the `-RP` parameter as follows: The Crystal Reports for PeopleSoft application appends the language code, as defined by the `-LG` parameter of the command line, to the path set in the `-RP` parameter and searches for the report. If the report does not exist, the application appends the language code which uses the preferred language as specified on the user's machine to the path set in the `-RP` parameter and searches for the report. If

the report still does not exist, the application appends the language code which uses the base language as defined for the PeopleSoft system to the path set in the -RP parameter and searches for the report. If the report still does not exist, the application searches for the report using the path set in the -RP parameter. Finally, if the report is not found in any of these directories, the search fails.

- If the -RP parameter is not specified, Crystal should look for translated reports based on the CRWRPTPATH environment variable as follows: The Crystal Reports for PeopleSoft application appends the language code, as defined by the -LG parameter of the command line, to the path set in the directory specified by the CRWRPTPATH environment variable and searches for the report. If the report does not exist, the application appends the language code which is the preferred language as specified on the user's machine to the path set in the directory specified by CRWRPTPATH and searches for the report. If the report still does not exist, the application appends the language code which is the base language as defined for the PeopleSoft system to the path set in the directory specified by CRWRPTPATH and searches for the report. If the report still does not exist, the application searches for the report using the path set in the directory specified by CRWRPTPATH. Finally, if the report is not found in any of these directories, the search fails.

See Also

Chapter 2, "Using Crystal Reports," Specifying the Path for Production Crystal Reports, page 7

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler, "Defining PeopleSoft Process Scheduler Support Information"

APPENDIX A

Using PeopleTools RPT Conversion Utility

The PeopleTools RPT Conversion utility is a standalone program that converts your .rpt files from the format PeopleSoft used in previous releases to the PeopleTools 8 format. You only need to run this program if you are upgrading from previous versions of PeopleTools. This appendix discusses how to:

- Convert .rpt files.
- Repair .rpt files.

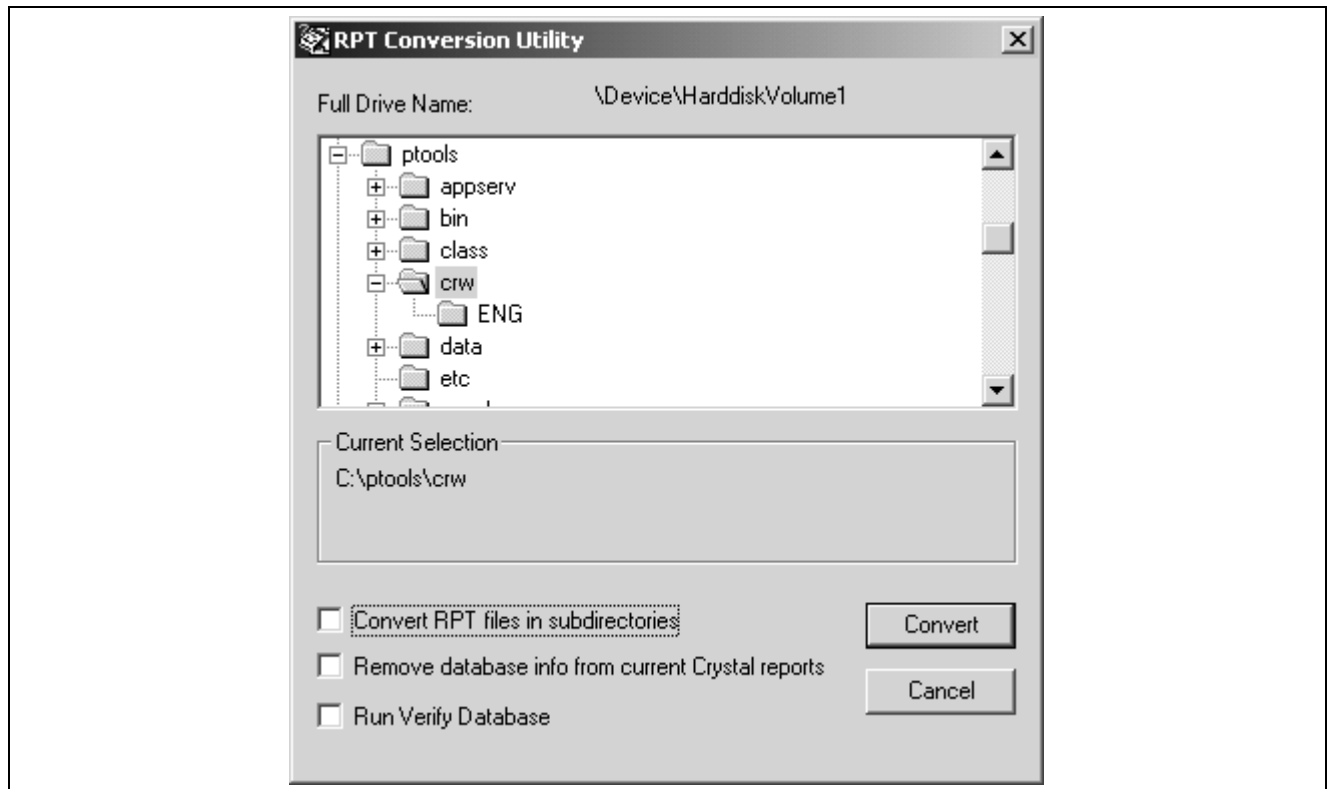
See Also

PeopleSoft Upgrade Guide for Your Platform

Converting RPT Files

Before you run the PeopleSoft RPT Conversion utility, we recommend moving your report files to a specific directory. You can then point the conversion utility to that directory.

Note. We also recommend backing up your report files. If any problem occurs while you run this program, your report files may become corrupted.



RPT Conversion Utility dialog window

To run the conversion:

1. Select Start, Programs, PeopleSoft 8, PeopleTools RPT Converter. Alternatively, run pscvtrpt.exe from <PS_HOME>\bin\client\winx86.

The Selected Report directory will default to the location of your Crystal Reports as specified in the Configuration Manager. If you wish to convert files in a different location, select the new directory.

2. Select the check box Convert RPT files in subdirectories.

The database information will automatically be removed from older reports that are converted. After the conversion, reports that were successfully converted will appear in the Files Converted list box.

3. Select Convert.

If you have not logged into the PeopleSoft database, you will be prompted to do so. After you successfully log into a database, you will see a progress window.

4. At the prompt "Successful conversion of x files. Skipped x files," click OK. When the conversion is complete, a Close button is enabled.

5. Select Close.

Before closing, take note of any .rpt files that failed to convert. This is usually due to read only access.

Repairing RPT Files

You can use the RPT Conversion utility when you are experiencing problems with a report that has already been converted as part of the upgrade procedure.

Note. Select the Run Verify Database option first. If the problem is still not resolved, select the Remove database info from current Crystal reports option.

To repair RPT files:

1. Select Start, Programs, PeopleSoft 8, PeopleTools RPT Converter.

The Selected Report directory will default to the location of your Crystal Reports as specified in the Configuration Manager. If you wish to repair files in a different location, select the new directory.

2. Select either the Run Verify Database or the Remove database info from current Crystal reports check box.

The Run Verify Database option verifies whether the query information saved in the report is in sync with the query definition.

After completion, reports that were current and had the database information removed will appear in the Files Converted list box, with a * to the left of the report name.

3. Select Convert.

You will see a progress window.

4. At the prompt “Successful conversion of x files. Skipped x files,” click OK. When the conversion is complete, a Close button is enabled.

5. Select Close.

Before closing, take note of any .rpt files that failed. This is usually due to read only access.

APPENDIX B

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

“About This PeopleBook,” Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijani Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Franc
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldives Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa'anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft 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.
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 Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft 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	<p>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.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>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.</p>

agreement	In PeopleSoft 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 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.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft 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 Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft 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 event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft 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 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 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.
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 Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft 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.
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 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 Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
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> .
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.
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, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft 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.
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.
condition	In PeopleSoft 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. 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.
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 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 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.
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 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	<p>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.</p> <p>In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.</p>
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.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
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 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 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 General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft 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 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.
event	<p>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.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
event propagation process	In PeopleSoft 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.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft 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 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.
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 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.
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.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft 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 Time and Labor, for example, employees are placed in groups for time reporting purposes.
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, user interaction objects, and so on.
incentive rule	In PeopleSoft 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 Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft 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.
KPI	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment. 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.

LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft 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.
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.
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.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft 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 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.
match group	In PeopleSoft 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 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 Structured Query Language (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	Metastings are special expressions included in SQL string literals. The metastings, 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 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 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.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
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 and non-PeopleSoft 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 Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft 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 application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft 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.
plan	In PeopleSoft 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 Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft 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.
price list	In PeopleSoft Enterprise Pricer, 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	In PeopleSoft Enterprise Pricer, defines 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 condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft 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 category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
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 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 Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
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 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 Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft 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> .
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
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 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 eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
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.
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.
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.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	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 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.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft 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.
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.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft 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 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 Receivables, an activity that defines how the system generates accounting entries for the general ledger.
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.
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, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft 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 systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
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 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.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All 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 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 terms 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 data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft 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.
worksheet	A way of presenting data through a PeopleSoft 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 schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . 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.

Index

A

- (ACTQRY).RPT report 17
- additional documentation vi
- alias reports, limitations of running 14
- application fundamentals v

C

- client setup, running 8
- column headings, modifying defaults 12
- comments, submitting ix
- common elements ix
- compatibility issues 5
- Configuration Manager 6
- contact information ix
- cross-references viii
- CRWRPTPATH, specifying 8
- Crystal 9 vs. Crystal 8.5 5
- Crystal EXEs path 7
- Crystal Report
 - installing 2
- Crystal Reports
 - customization for multilingual environments 21
 - searching for translated 21
 - understanding versions for multiple languages 19
- Customer Connection website vi

D

- defaults
 - column headings 12
 - Crystal EXEs path 7
 - customized report location 7
 - fonts 13
 - modifying 12
 - production report path 7
 - report titles 12
 - reports 17
- details section 11
- documentation
 - printed vi
 - related vi
 - updates vi

F

- fonts
 - changing attributes 13
- footers
 - page 11
 - report 11

G

- globalization
 - language sensitivity for report data 18
 - report layout and boilerplate text 18
 - searching for translated reports 21
 - understanding the language parameter for pscrrun.exe 21
 - versions for multiple languages 19
- glossary 47

H

- headers
 - page 11
 - report 11
- HTML reports, printing 12

I

- installation 2
- integration 1

L

- language codes 19
- language sensitivity 18

M

- MMA Partners vi
- multilingual environments 21

N

- notes viii

P

- page footers 11
- page headers 11
- paths
 - CRWRPTPATH 8
 - Crystal EXEs 7

- production reports 7
- PeopleBooks
 - ordering vi
- PeopleCode, typographical
 - conventions vii
- PeopleSoft application fundamentals v
- PeopleSoft database, logging into 10
- PeopleSoft Process Scheduler
 - defining paper size 12
 - running reports 5, 14
 - tracing reports through 7
- PeopleSoft Query 1
 - launching reports with 17
 - understanding repeated prompts and 18
- PeopleTools Configuration Manager 6
- prerequisites v
- print date fields 13
- printed documentation vi
- process requests, running reports using 14
- Process Scheduler, *See* PeopleSoft Process Scheduler
- production reports, specifying path for 7
- pscfg.exe 6
- psccrun.exe 21
- PSToUChar 20
- PSToWords function 19
- PSToWordsLoc function 19

Q

- queries
 - creating 2
 - exporting to Crystal 5
 - saving 2
- Query, *See* PeopleSoft Query
- Query Designer, running reports with 13
- query prompts 18

R

- records
 - selecting 11
 - sorting 11
- related documentation vi
- related language tables 18
- repeated query prompts 18
- report definitions
 - creating 2
 - saving 2
- report footers 11

- report headers 11
- report titles, modifying defaults 12
- reports
 - (ACTQRY).RPT 17
 - converting 23
 - creating 10
 - formatting 11
 - launching with PeopleSoft Query 17
 - modifying defaults 12
 - previewing 11
 - printing 12, 17
 - refreshing 11, 17
 - repairing 24
 - running from Crystal Reports 16
 - running from PeopleSoft Process Scheduler 14
 - running from Query Designer 13
 - running with runtime prompts 14
 - saving 11
 - searching for translated 21
 - specifying default location 7
 - translating 19
 - understanding limitations of running
 - alias reports 14
- RPT Conversion Utility 23
- rpt files
 - converting 23
- RPT files
 - repairing 24
- runtime prompts, setting 14

S

- suggestions, submitting ix

T

- templates, selecting 11
- terms 47
- titles 11
- ToWords function 19
- two-tier, logging into 10
- typographical conventions vii

U

- Unicode 20
- Use trace during execution 7

V

- visual cues viii

W

- warnings viii
- workstations, setting up 8

