PeopleSoft®

Enterprise PeopleTools 8.46 PeopleBook: Crystal Reports for PeopleSoft

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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.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements, such as fields and check boxes, 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.

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

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

Note. Application fundamentals PeopleBooks are not applicable to the PeopleTools product.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Most PeopleSoft product lines have a version of the application fundamentals PeopleBook. The preface of each PeopleBook identifies the application fundamentals PeopleBooks that are associated with that PeopleBook.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across one or more product lines. 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 the appropriate application fundamentals PeopleBooks. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed 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 peoplebookspress@mmapartner.com.

See Also

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

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation & Software, Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Pre-built Integrations for PeopleSoft Enterprise and PeopleSoft EnterpriseOne Applications
Minimum technical requirements (MTRs) (EnterpriseOne only)	Implement, Optimize + Upgrade, Implementation Guide, Supported Platforms
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Prerelease Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes

Resource	Navigation
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

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, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	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 *O*.
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.

Typographical Convention or Visual Cue	Description
" " (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 (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

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.

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.

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 Used in 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.

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

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).

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

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.

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.

User ID   An ID that represents the person who generates a transaction.

See Also

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler

Enterprise PeopleTools 8.46 PeopleBook: Using PeopleSoft Applications

Crystal Reports for PeopleSoft Enterprise Preface

This book discusses Crystal Reports for PeopleSoft Enterprise.

Crystal Reports for PeopleSoft Enterprise

Crystal Reports for PeopleSoft Enterprise 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.

Getting Started With Crystal Reports for PeopleSoft Enterprise

This chapter provides an overview of Crystal Reports and discusses:

• Crystal Reports integrations.

• Crystal Reports implementation.

Crystal Reports for PeopleSoft Enterprise 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 .

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).	*The PeopleTools Installation guide for your database platform.*

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 *Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Query*.

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

Enterprise PeopleTools 8.46 PeopleBook: Getting Started with PeopleTools

Using Crystal Reports

This chapter provides an overview of Crystal 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

The following lists the compatibility issues that you should be aware of 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, you should create 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.

• If you are using PeopleSoft Process Scheduler to run Crystal Reports, you should not install on the same machine a different version of Crystal Reports other than the one that is delivered to work with 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.

• Sign 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.
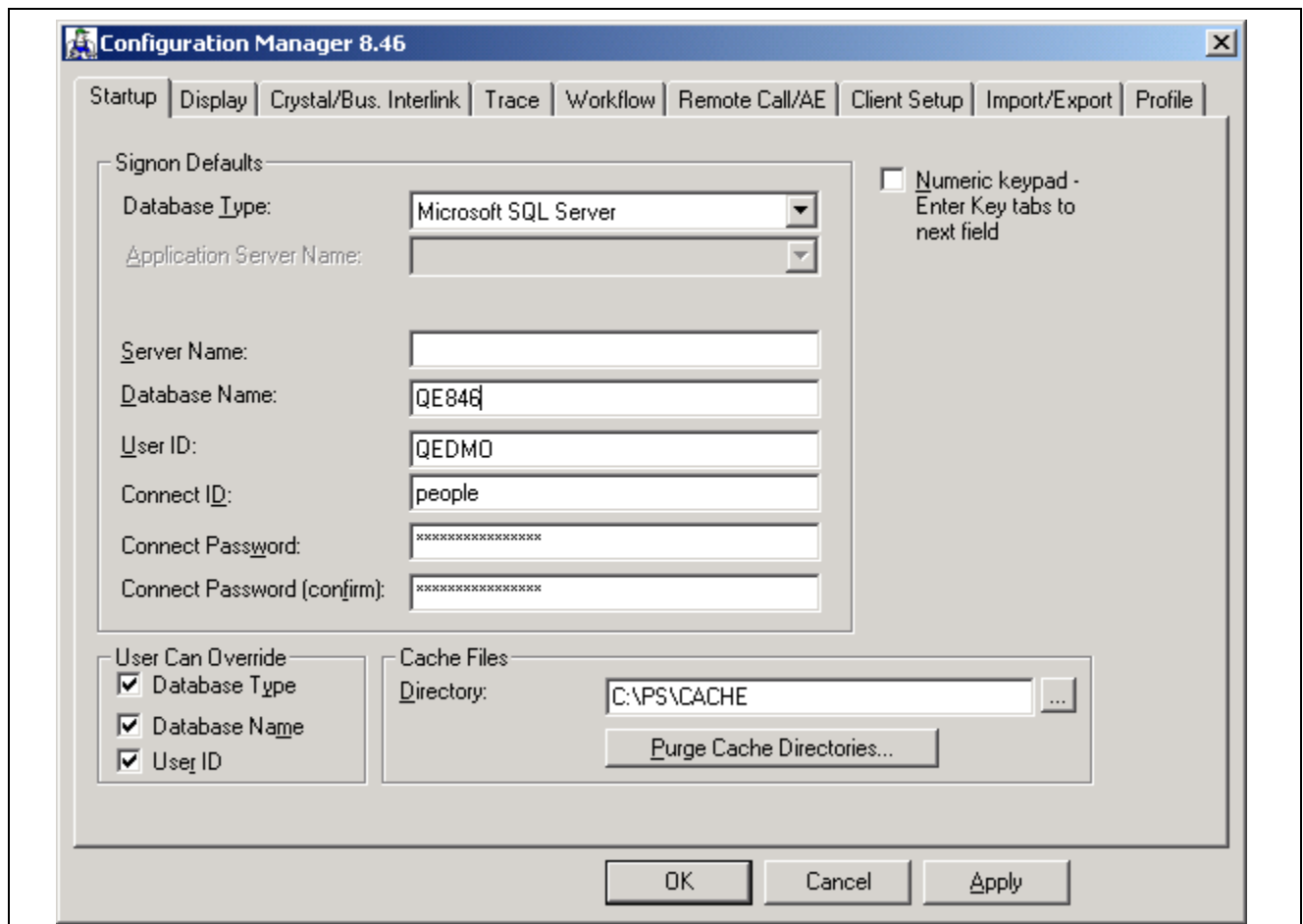
Configuration Manager 8.46 dialog box

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 through 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 is 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:*n:\hr880\bin\client\winx86\crystal*.
Default Crystal Reports	The Default Crystal Reports option allows you to specify the default location of your customized reports.
	Note. If you are creating a Crystal report from PeopleSoft Query and this path is invalid, you will receive an error message. If a path is not specified, PeopleSoft Query tries to write the file to the language directory beneath the directory containing Crystal Reports (CRWRPTPATH).
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.
	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 is located in <PS_HOME>/appserv/prcs/<dbname> for UNIX and in <PS_HOME>\appserv\prcs\<dbname> for Microsoft Windows.) Change *Trace=YES* and specify a location for *TraceFile*, supplying a full path and file name.

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 8.46 PeopleBook: System and Server Administration*, "Using PeopleSoft Configuration Manager," Configuring User Profiles.
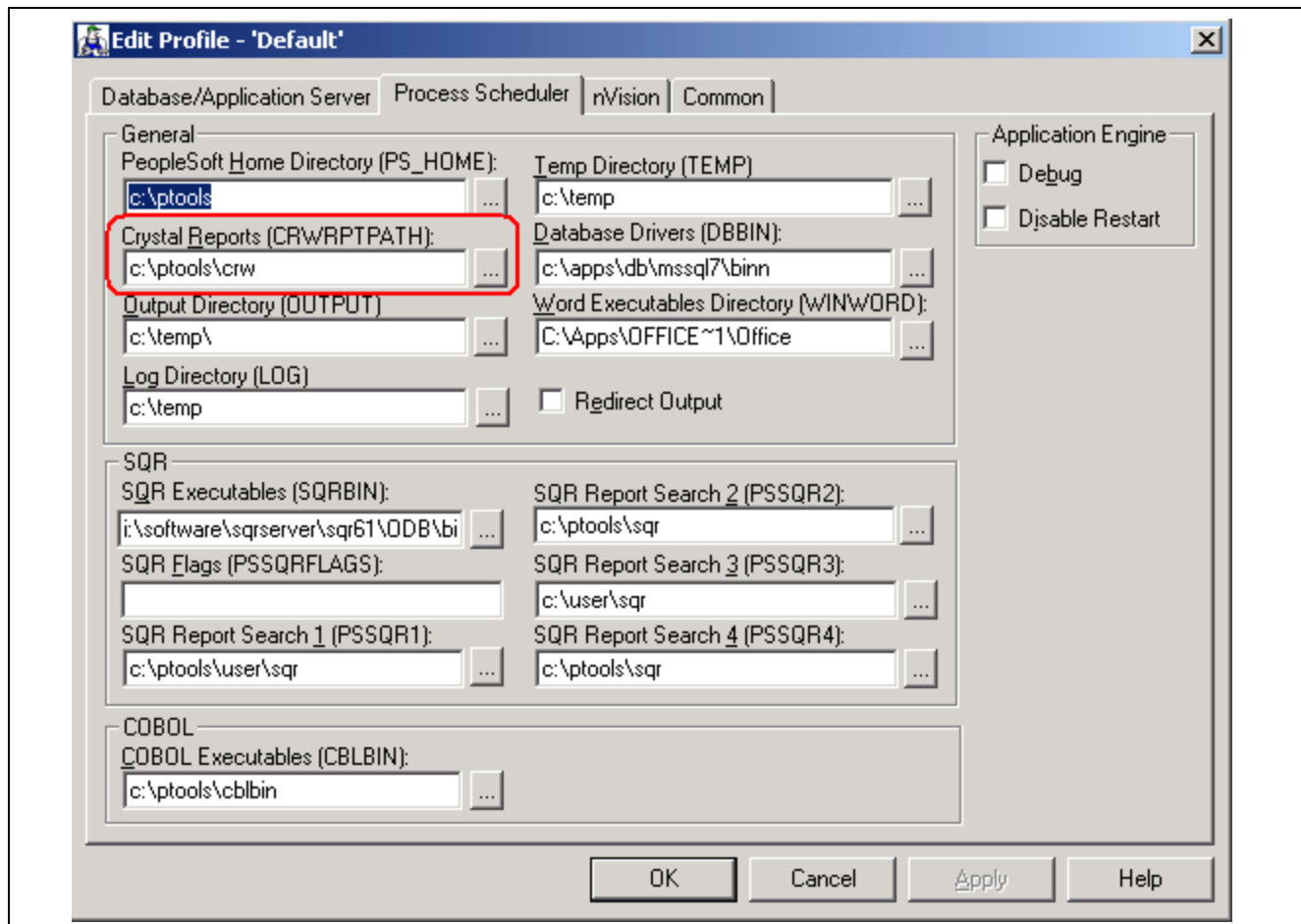
Configuration Manager - Process Scheduler Settings dialog box

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.

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:

• 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 Open Database Connectivity (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 DSN.

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 DSN required by PeopleSoft Open Query and by Crystal Reports.

   • You can click ODBC Administrator to directly access the Microsoft ODBC Administrator and 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 either creates or updates settings in the registry, but does 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.

Signing into a PeopleSoft Database

You must sign 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 sign into a PeopleSoft database using Crystal's sign-in dialog. When you run a preexisting report, you sign in to a PeopleSoft database using PeopleSoft's sign-in dialog. After successfully signing 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 DSN.

    Note. When signing in to 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 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 do 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 8.46 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 Microsoft Windows version of Query Designer—that is, if you have a Microsoft 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 Microsoft Windows server without having to exit the PeopleSoft system or use a third-party scheduling program. If you schedule processes to run on a Microsoft 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 8.46 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, the prompt values need to be passed using the Command Line. You can do this either by hard-coding static values in the Process Definition page, or by creating a PeopleSoft Pure Internet Architecture 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:

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 PeopleSoft Pure Internet Architecture Run Control page.

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 8.46 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.
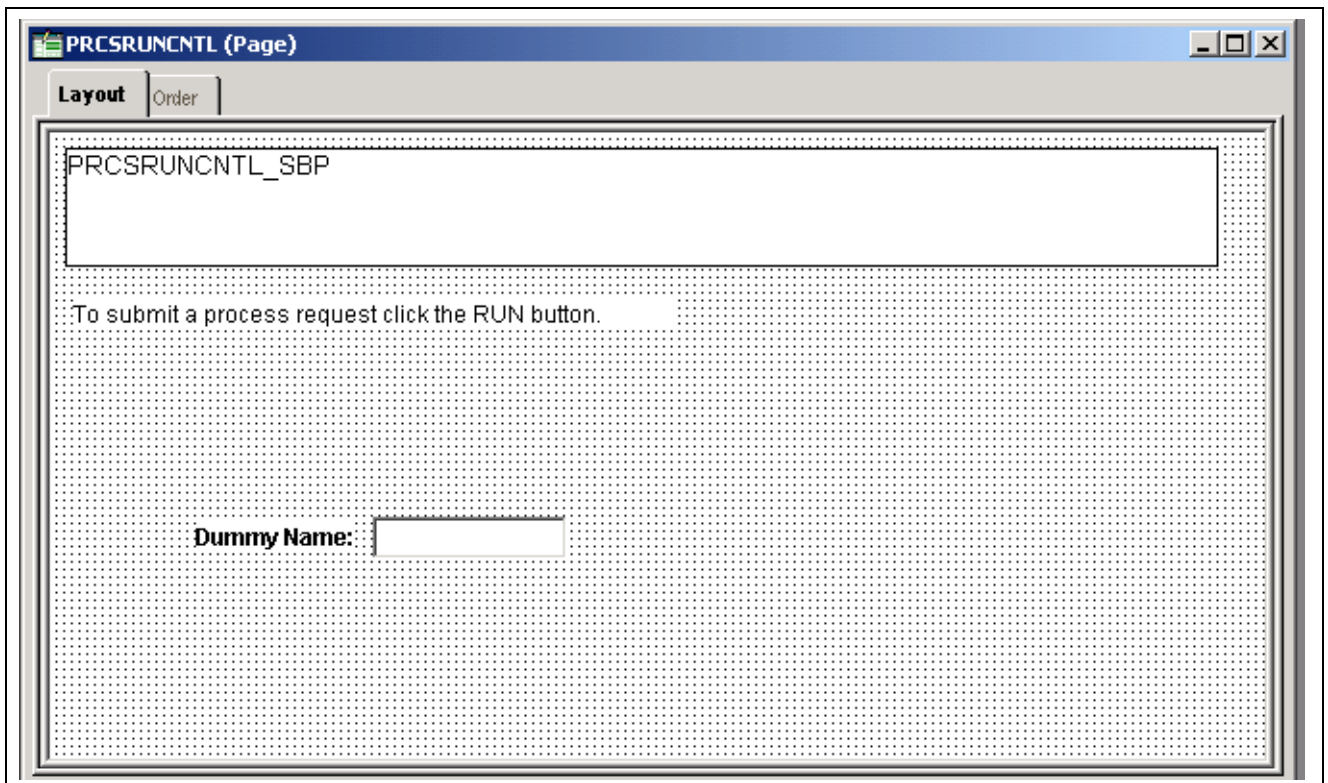
Example PeopleSoft Application Designer - Run Control page

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. Select 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've signed 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 are 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 8.46 PeopleBook: PeopleSoft Query, "Creating and Running Simple Queries"

Working with Multiple Languages

This section discusses:

- Data returned by the report.

- Report layout and boilerplate text.
- Crystal Reports Designer/Runtime language versions.
- The language parameter for pscrrun.exe.
- The customization of Crystal Reports for multilingual environments.
- 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

Crystal Reports is available in several different language editions. You receive the appropriate language edition of Crystal Reports based on the languages you license when you purchase PeopleSoft software. 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 the Crystal *ToWords* function. This limitation can be overcome by using the *PSToWords* or *PSToWordsLoc* functions.

Using PSToWords and PSToWordsLoc

PSToWords and *PSToWordsLoc* are similar to the Crystal *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 the Crystal 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, psicudt22l.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 8.46 PeopleBook: Global Technology*, "Adding New Languages," Determining PeopleSoft and ISO Codes for Your Language.

See *Enterprise PeopleTools 8.46 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 Application Protocol Interface (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 pscrrun.exe process to execute Crystal Reports. The process's language code parameter specifies the language directory that pscrrun.exe uses to fully qualify the report path. Unlike Structured Query Reports (SQRs), pscrrun.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, pscrrun.exe looks in the default, base-language directory.

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

See Also

Enterprise PeopleTools 8.46 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-supported language instead of just the language of the installed version of Crystal Reports.

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:

• 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.

• The -RP parameter specifies a path but does not specify the full report name including the .rpt extension.

  Crystal looks 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.

• The -RP parameter is not specified.

  Crystal looks 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

Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Process Scheduler, "Defining PeopleSoft Process Scheduler Support Information"

CHAPTER 3

Understanding Crystal Enterprise for PeopleSoft Enterprise

This chapter discusses:

• Integration points between Crystal Enterprise and PeopleSoft Enterprise.

• Query Access Services.

• Key Crystal Enterprise components.

Understanding Integration between Crystal Enterprise and PeopleSoft Enterprise

PeopleSoft Enterprise, together with Business Objects, provides a robust suite of reporting tools to be used with PeopleSoft products.

The diagram below illustrates how Crystal Enterprise integrates with PeopleSoft Enterprise.
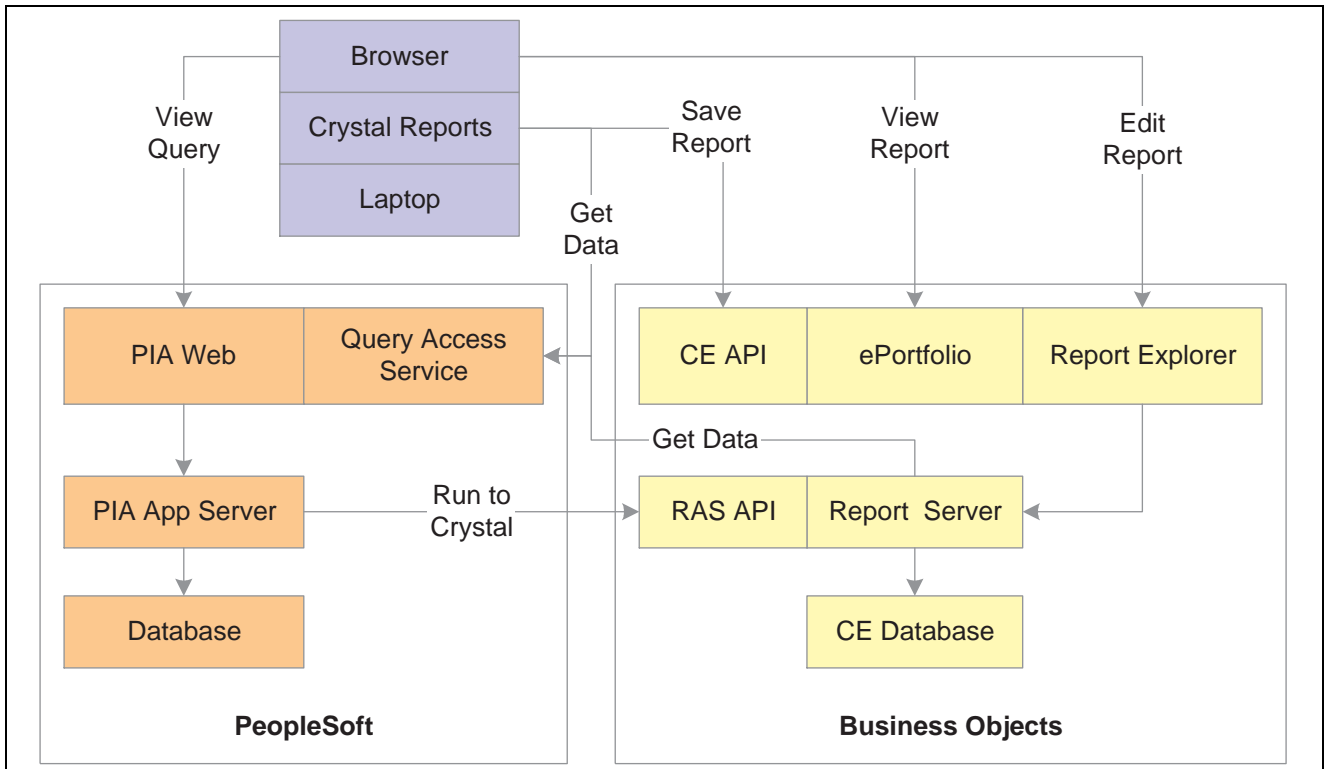
Crystal Enterprise integration with PeopleSoft Enterprise

Crystal Enterprise for PeopleSoft Enterprise interacts with PeopleSoft Enterprise security server using a plug-in. This integration provides single signon and ensures the synchronization of users and roles between PeopleSoft Enterprise and Crystal Enterprise.

Using a data driver that calls the Query Access Services, Crystal Enterprise receives data from PS Query and builds a report using Report Application Server (RAS) API.

The Crystal link in PeopleSoft Query enables you to automatically build a Crystal Report based on a selected query. The report is saved in the user's Favorites folder in Crystal Enterprise.

Understanding Query Access Services

The primary goal of Query Access Services (QAS) is to provide streaming PeopleSoft query results to Crystal Enterprise over the web to create Crystal reports. With QAS, a single Crystal Enterprise installation can work with multiple PeopleTools versions across all supported PeopleSoft platforms.

QAS plays the following roles in Crystal Enterprise for PeopleSoft Enterprise:

• Provides a mechanism for the Crystal Enterprise to access Query metadata so that users can design Crystal Reports based on the queries.

• Provides a mechanism for the Crystal Enterprise to obtain results for a query to be used in report definitions.

The following diagram illustrates the QAS architecture.
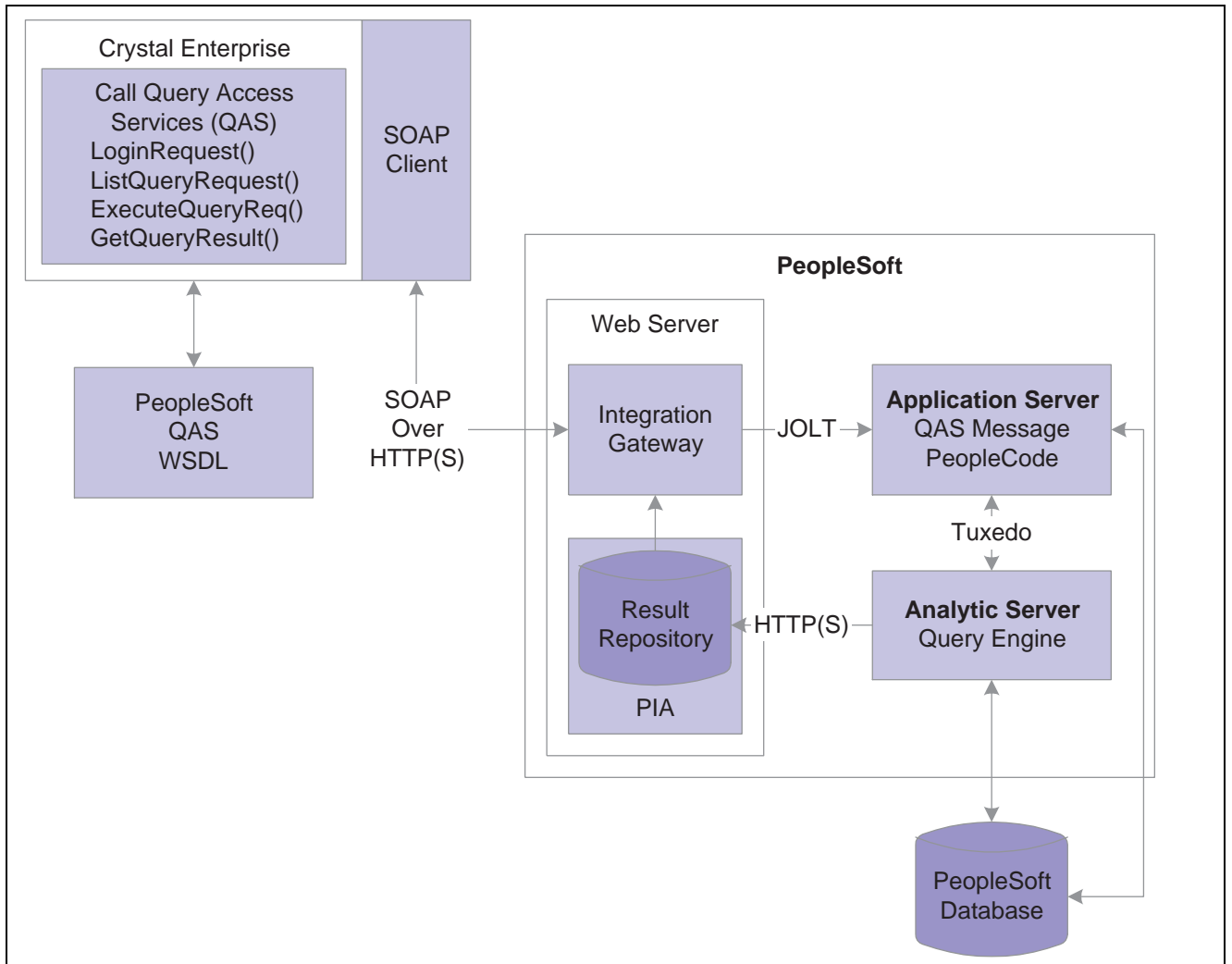
QAS architecture

The following sections describe each of the components in the Query Access Services architecture.

Integration Gateway

The Integration Gateway receives every Simple Object Access Protocol (SOAP) request coming from Crystal Enterprise. The Gateway forwards the request to the integration engine running on the web server. The *Run to Crystal* feature uses the Integration Gateway to populate the Data Source property of the Peoplesoft data driver location in the crystal report definition.

Web Server

The Integration Gateway resides on a PeopleSoft web server that generates the URL to navigate inside Crystal Enterprise. The Integration Gateway receives every SOAP request coming from Crystal Enterprise over HTTP/HTTPS. Using the QueryListening Connector class, results are received directly from the report repository.

Application Server

PeopleCode running on the application server implements most of the QAS services and generates the required response. The integration engine is installed on an application server as part of the PeopleSoft application.

Analytic Server

The Analytic server provides asynchronous query execution. The query engine is embedded in the analytic server. When a query execution request arrives, the PeopleCode delegates the request to one of the available analytic servers running within the same application server domain. The query engine starts executing the query based on the input parameters.

Report Repository

Once the query engine fetches the first block of results, it encapsulates the results in a well-defined XML format and posts the XML data in the Report Repository.

Crystal Enterprise

When Crystal Enterprise makes a request to obtain the XML data from the Report Repository, the request is authenticated and the data is sent directly from the report repository.

Key Crystal Enterprise Components

Crystal Enterprise has several components that work together to help you create, preview, and modify reports on the web. After a report has been created, use the Crystal Report Explorer to view and modify the report, then use the ePortfolio to view previously saved reports. While the Crystal Management Console enables you to manage the Crystal Enterprise administrative functions, the security plug-in ensures that the system verify all logon requests that specify PeopleSoft Enterprise.

Crystal Enterprise involves the interaction of the following components:

Crystal Management Console	The Crystal Management Console (CMC) enables you to perform administrative tasks. Administrative tasks include authenticating users, granting rights to groups, adding domains, mapping PeopleSoft roles with Crystal Enterprise roles, and adding users.
Crystal Report Explorer	Crystal Report Explorer is a web-based facility enabling you to create and modify reports immediately upon its creation. Using an intuitive drag and drop interface, Crystal Report Explorer enables you to preview the report, modify the fields and columns.
ePortfolio	ePortfolio is web-based front end that stores all the newly created reports. While in ePortfolio, you can view the current report or past iterations of the report, modify the layout of the report, schedule and run reports.
Security Plugin	The Crystal Management Server uses the Crystal Enterprise security plug-in to verify the user name and password against the system database. In the context of Crystal Enterprise for PeopleSoft Enterprise, the security plug-in enables you to map user accounts and groups from PeopleSoft into Crystal Enterprise. The user names and passwords are authenticated against the Crystal Enterprise user list that is synchronized with the users and roles in the PeopleSoft database.

CHAPTER 4

Using Crystal Enterprise for PeopleSoft Enterprise

This chapter provides an overview of Crystal Enterprise for PeopleSoft Enterprise access, lists prerequisites, and discusses how to:

• Access Crystal Enterprise.

• Create a report from PeopleSoft Query.

• Use Crystal Report Explorer.

• Review previously saved reports.

• Create Crystal Reports in Crystal Report 10

Understanding Access to Crystal Enterprise for PeopleSoft Enterprise

You can access Crystal Enterprise either from PeopleSoft Enterprise or from outside of PeopleSoft Enterprise. Depending on your role, you can sign on as an administrator, a regular user, or a guest.

As an administrator, you have direct access to the Crystal Management Console (CMC) where you can perform administrative tasks. As a regular user, you can access the ePortfolio where you can view, run, schedule, and modify reports. However, if you are a guest, you have limited access to Crystal Enterprise. A guest user, by default, uses a Concurrent Access License (CAL) rather than a password. If too many users sign on as guest, others may be denied access even if they have valid credentials.

Note. As a general practice, you should disable the guest account.

See *Crystal Enterprise Administrator's Guide*

Prerequisites for Using Crystal Enterprise for PeopleSoft Enterprise

Before you use Crystal Enterprise for PeopleSoft Enterprise, you must have:

• A working knowledge of Crystal Enterprise functionality.

• A working understanding of PeopleSoft Pure Internet Architecture.

• Configured PeopleSoft Enterprise settings.

• Performed Crystal Enterprise administrative tasks related to PeopleSoft Enterprise.

Accessing Crystal Enterprise

This section discusses how to:

• Access Crystal Enterprise from PeopleSoft Enterprise.

• Access Crystal Enterprise from outside of PeopleSoft Enterprise.

Pages Used to Access Crystal Enterprise from PeopleSoft Enterprise

Page Name	Object Name	Navigation	Usage
Launch Crystal Enterprise	PSCENAV	Reporting Tools, Crystal Enterprise. Launch Crystal Enterprise Click the Launch Crystal Enterprise link on the page.	Access the Crystal Enterprise ePortfolio page where you can view, modify and schedule reports.

Accessing Crystal Enterprise from PeopleSoft Enterprise

Access the Launch Crystal Enterprise page.
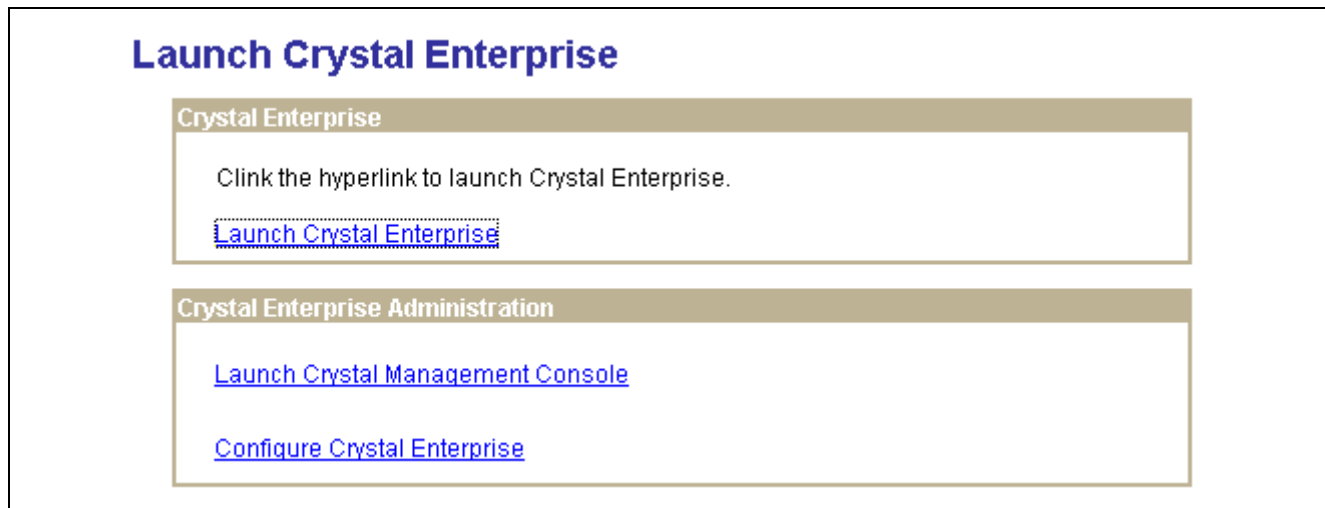
Launch Crystal Enterprise page

To access Crystal Enterprise from PeopleSoft:

1. Access the Launch Crystal Enterprise page.

2. Click the Launch Crystal Enterprise link to gain direct access to the Crystal Enterprise ePortfolio screen.

   If you have been granted administrative privileges, click the *Launch Crystal Management Console* link to gain direct access to the Crystal Management Console (CMC) log on screen.

   If you want to configure the Crystal Enterprise web server or the Crystal Management Server (CMS) database, click the Configure Crystal Enterprise link.

   Important! Only users who belong to the QAS Admin role can see the two links in the Crystal Enterprise Administration group box.

Accessing Crystal Enterprise from Outside of PeopleSoft Enterprise

If you are accessing Crystal Enterprise from outside of PeopleSoft Enterprise, you can simply type the URL for your Crystal Enterprise site in your web browser. If you are using the windows client, you can select the Crystal Enterprise User Launchpad from the program group on the Microsoft Windows Start menu.

See *Crystal Enterprise User's Guide*

Creating a Report from PeopleSoft Query

This section provides an overview of running to Crystal and discusses how to build a report from PeopleSoft Query.

Understanding Run to Crystal

Run to Crystal is a web-based facility that is equivalent to what is currently available in the Windows client – PSQuery. The primary goal of Run to Crystal is to export PeopleSoft queries to Crystal Enterprise and to build a report based on the queries.

Using Query Manager or Query Viewer in the PeopleSoft Pure Internet Architecture, you can select a query and display it in the browser. Once you've decided which query to use for your report, you can then click the Crystal link to build a report with RAS API and then view that report in another browser window using the Crystal Report Explorer.
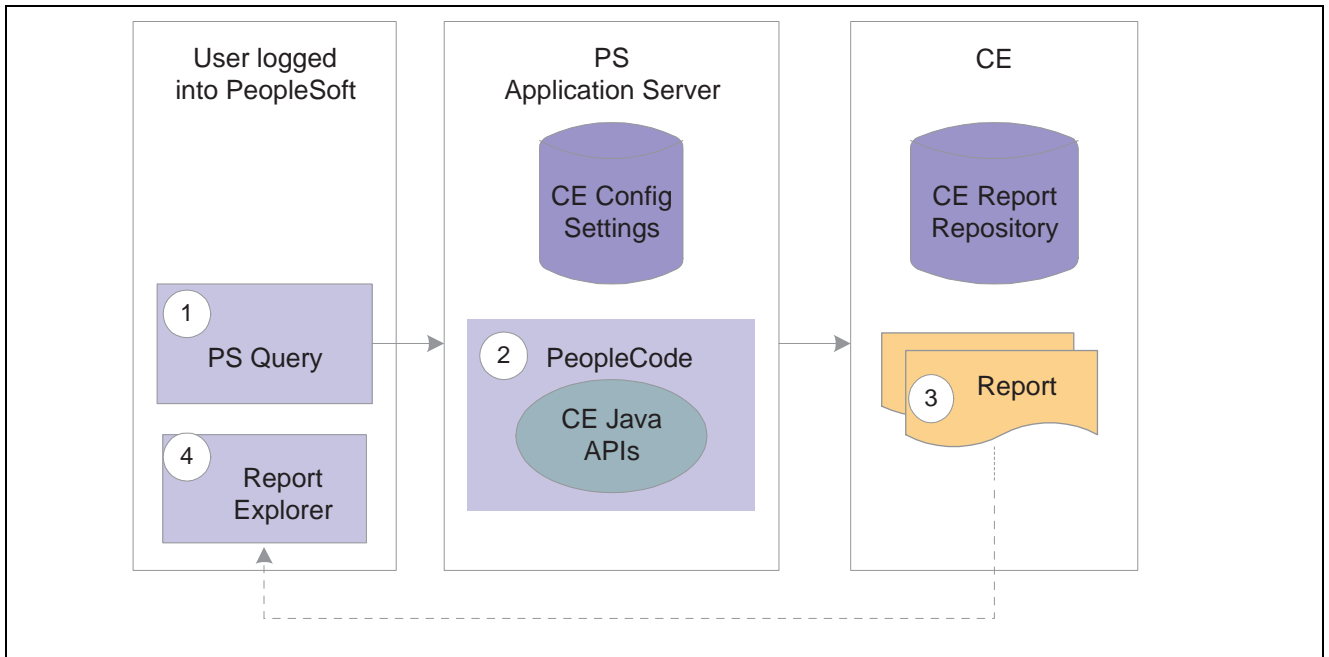
Run to Crystal process flow

Pages Used to Create Report from PeopleSoft Query

Page Name	Object Name	Navigation	Usage
Query Manager	QRY_SELECT	Reporting Tools, Query, Query Manager Click Search to locate the query. Select the query then click the run to crystal link.	To select a query to be used for your Crystal Report.

Building a Report from PeopleSoft Query

Access the Query Manager search page.

Query Manager search page

To create a report from PS Query:

1. On Query Manager search page, search for the Query that you want to use for your report.

   Note. You must first save the query before you export it to Crystal Enterprise.

2. Click the Crystal link corresponding to the Query name.

   PeopleSoft Pure Internet Architecture builds a report with the RAS API. The Crystal Report Explorer automatically previews the report in another browser window.

   Note. The Crystal link is also available in the Query Viewer page.

Note. In order to see the Crystal link, you must belong to the CE User role.

Using Crystal Report Explorer

This section provides an overview of Crystal Report Explorer and discusses how to modify reports.

Understanding Crystal Report Explorer

Crystal Enterprise Report Explorer is a web based facility that enables you to preview and modify crystal reports from the Crystal Enterprise web desktop. When you are satisfied with the report that you've modified, you can either save it to a local folder on your computer or publish it in Crystal Enterprise

To access the Modify Report page in the Report Explorer, you can click the Crystal link on the Query Manager search page or the Query Viewer page.

Modifying Reports

Access the Modify Report page
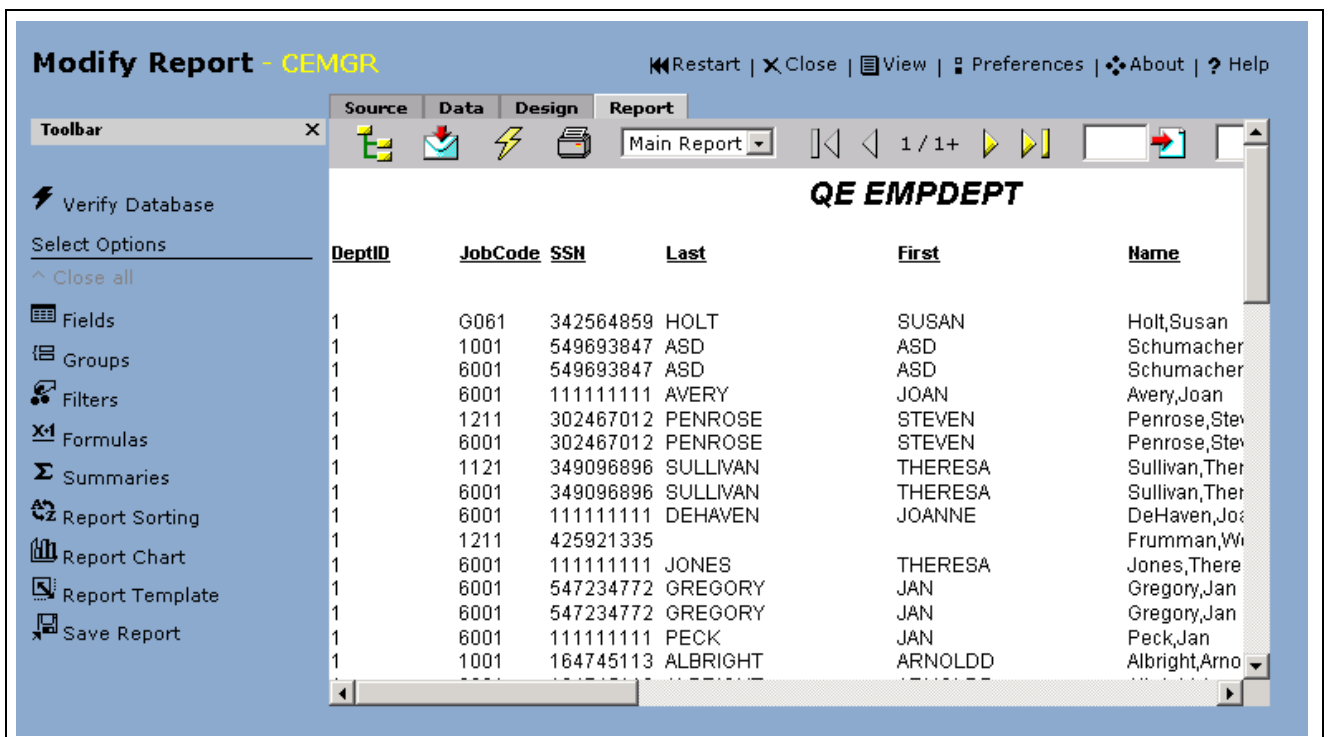
Report Explorer showing the Modify Report page

The Report Explorer provides you with the Modify Report page. You can find various reporting tools on this page including buttons, toolbar options, and tabs.

Source Tab

Use the fields on the Source tab to keep track of the objects that you are working with.

Data Tab

Use the Data tab to view the data in the grid without formatting. You can use the grid to preview the raw data that you modify and refine the reports by adding groups, filters, summaries, calculations, and so on.

Design Tab

Use the Design tab to view and modify the layout and format your report. You can move the format field objects, add text objects, and rearrange and format report sections.

Report Tab

Use the Report tab to view your Crystal Report. You can also modify the report's layout and formatting. You can position and format objects such as fields and charts.

See Also

Crystal Enterprise User's Guide

Reviewing Previously Created Reports

Access the Launch Crystal Enterprise page in the PeopleSoft Pure Internet Architecture.
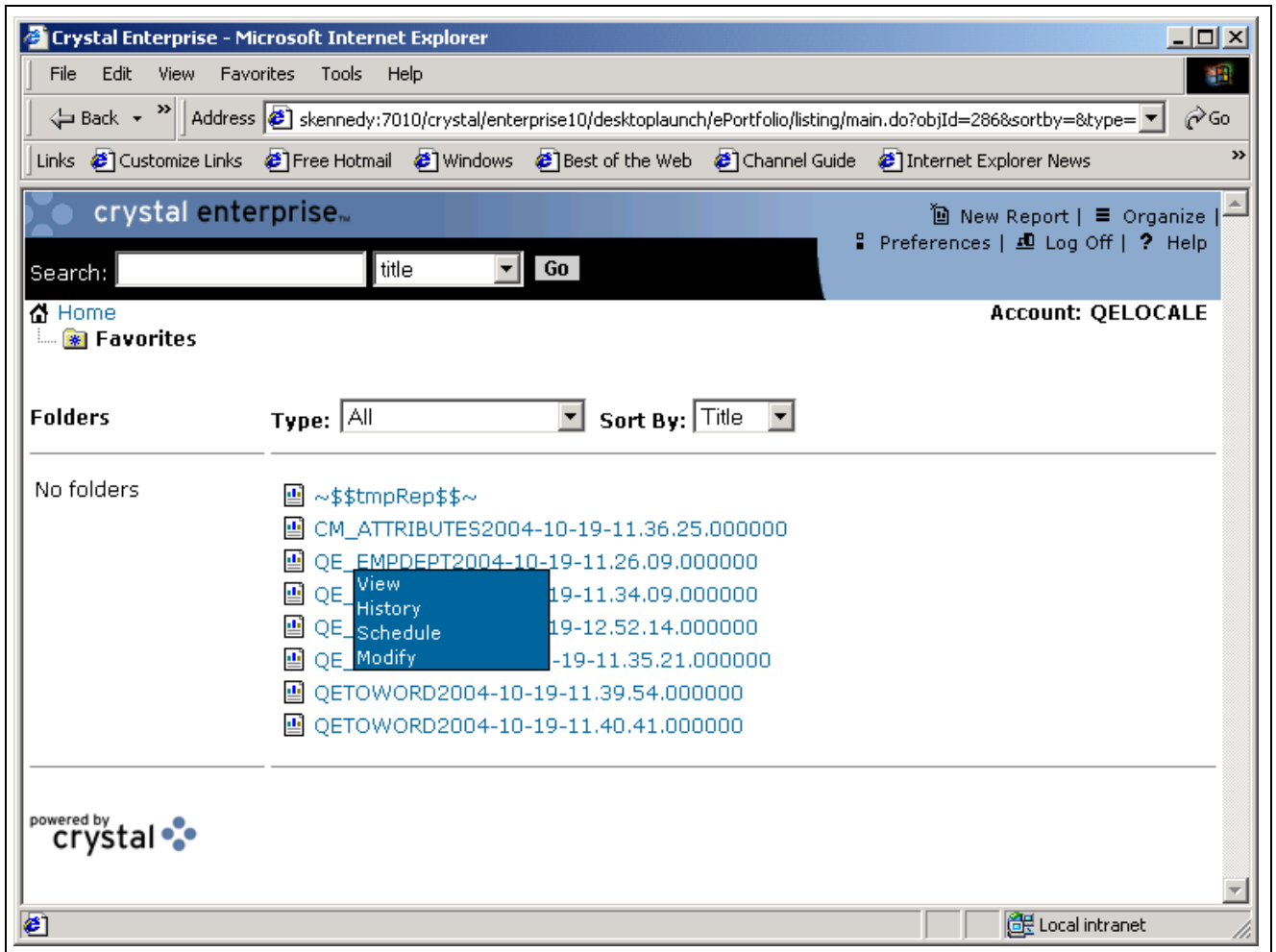
Crystal Enterprise reports displayed in the ePortfolio

To review previously saved reports:

1. Click the Launch Crystal Enterprise URL on the Launch Crystal Enterprise page to access ePortfolio.

2. Open up the folders where the saved reports are stored.

3. Once you've located the report, left click the report link to view these options:

    • View

       View displays the report with current data. You might not have permissions to view a report, in which case, View will not appear as an option

    • History

       History enables you to select and view previously run reports. This option only displays if there are previously run reports. When viewing an historical report, you can click the Refresh icon to view the current data.

• Schedule

Schedule enables you to define appropriate times for a report to be run. This option displays only if you have permissions to schedule a report. Permissions are granted by the Crystal Administrator using the Crystal Management Console.

Note. This option is not related to PeopleSoft Process Scheduler.

• Modify

Modify allows you to modify the displayed fields, grouping, sorting, filters, and other features of the report. This option launches the Crystal Report Explorer that allows you to modify the report.

Note. Crystal Report for PeopleSoft Enterprise does not support the use of the New Report link in ePortfolio to create reports.

Creating Crystal Reports in Crystal Report 10

This section provides an overview of report creation in Crystal Report 10 and discusses how to:

• Set up environment variables.

• Create reports.

• Save reports.

Understanding Report Creation in Crystal Report 10

Although Crystal Report 10 is a Microsoft Windows-based application on the client desktop, you can open the reports from Crystal Enterprise and create new ones as well. Using the Query Access Services, you can preview Crystal Reports from Crystal Enterprise. You can also save new and modified reports to Crystal Enterprise.

Important! Crystal Reports version 9 supports running existing Crystal Reports on PeopleSoft Process Scheduler. However, reports created in Crystal Report 10 cannot be run on PeopleSoft Process Scheduler

Setting Up Environment Variables

After you have installed Crystal Enterprise 10, you must set the environment variables.

PATH

The PATH environment variable should include:

```
c:\Program Files\Crystal Decisions\Enterprise 10\win32_x86
```

CLASSPATH

The CLASSPATH environment variable should include:

```
c:\Program Files\Crystal Decisions\Enterprise 10\java\applications\cewcanative.Jar
```

Creating Reports

To create a report in Crystal Report 10:

1. In Microsoft Windows, select Start, Programs, Crystal Reports 10.

2. In the Welcome to Crystal Reports dialog box, select Using a Report Wizard in the Create a New Crystal Report Document, and click OK.

3. In the Crystal Reports Gallery dialog box, select Using the Report Wizard, and then select Standard.

4. Click OK.

5. In the Data dialog box, double-click Create New Connection.

6. Double-click the PeopleSoft Enterprise folder to display the Connection Info screen.

    > **Note.** If the PeopleSoft Enterprise folder is not present, it means that you haven't installed the security plug-ins.

7. In the Server Name field, enter the URL to access the current PeopleSoft Enterprise domain that you specify in the Crystal Management Console, Authentication, PeopleSoft Enterprise tab, for example: *http://megar102903.peoplesoft.com:8000/PSIGW/QueryListeningConnector*.

    See Chapter 7, "Administering Crystal Enterprise for PeopleSoft Enterprise," Using PeopleSoft Enterprise Authentication, page 53.

8. Enter the user name and password.

9. Click Finish.

    > **Note.** Once you've added a new connection, the connection URL appears in the Data dialog box. You can bookmark the URL by right clicking it and select Add to Favorites. In the future, you can easily access this URL from the favorite list within the Crystal Reports.

10. In the Data dialog box, open the QUERY folder under PeopleSoft Enterprise.

11. Select a query that you want to use for your report and click the > to move it to the Selected Tables area.

12. Click Next.

13. In the Fields Display dialog box, select the fields that you want to display in the report, and then click > to move the fields to the Display area.

14. You can click Next repeatedly to skip the next three optional dialog boxes: Grouping, Record Selection, and Template if deemed appropriate.

15. When you've finished making your selections, click Finish to preview the report in the Report Explorer window.

16. You can select the Design tab and Report tab to format the report.

17. When you are satisfied with the report, select File, Save As to save your report.

Saving Crystal Reports

You can save the reports to a local folder or to Crystal Enterprise.

Local Folder

To save a report in a local folder:

1. Select File, Save As.

2. In the Save As dialog box, specify the location of the folder where you want to save the report.

3. Click OK.

Crystal Enterprise Folder

To save a report in Crystal Enterprise:

1. Select File, Save As.
2. In the Save As dialog box, click the Enterprise icon to access the Log on to Crystal Enterprise screen.
3. Enter the CMS name in the System field.
4. Enter the user name and password.
5. Select PeopleSoft Enterprise in the Authentication drop-down list.
6. Click OK.
7. Select File, Save As.
8. Specify the location of the folder where you want to save your reports.

CHAPTER 5

Understanding Security Services

This chapter discusses:

- Security access to Crystal Enterprise from PeopleSoft.

- Single signon, trust relationships and group membership in Crystal Enterprise for PeopleSoft Enterprise.

Understanding Security Access to Crystal Enterprise from PeopleSoft Enterprise

Crystal Enterprise for PeopleSoft Enterprise provides seamless security integration between PeopleSoft and Crystal Enterprise. A PeopleSoft user can navigate from the PeopleSoft Pure Internet Architecture to Crystal Enterprise directly with a single signon.

When a user logs into PeopleSoft Pure Internet Architecture, PeopleSoft creates a PS_TOKEN and sends it back as part of a browser cookie. If the same user clicks the link to access Crystal Enterprise, the browser sends the PS_TOKEN to Crystal Enterprise to request permission to enter the system. Crystal Enterprise then invokes the PeopleSoft authentication API along with the PS_TOKEN to authenticate the User ID and password.

To secure access between PeopleSoft Enterprise and Crystal Enterprise, the following security measures are enforced:

- Only users who belong to the QAS Admin role can see the Launch Crystal Management Console and Configure Crystal Enterprise URLs when they attempt to launch Crystal Enterprise from the PeopleSoft Pure Internet Architecture.

- Only users who belong to the CE User role can see the Crystal link on the Query Manager search page or Query Viewer page.

- You can add permission lists to the above roles in order to further restrict access to the administration and configuration pages.
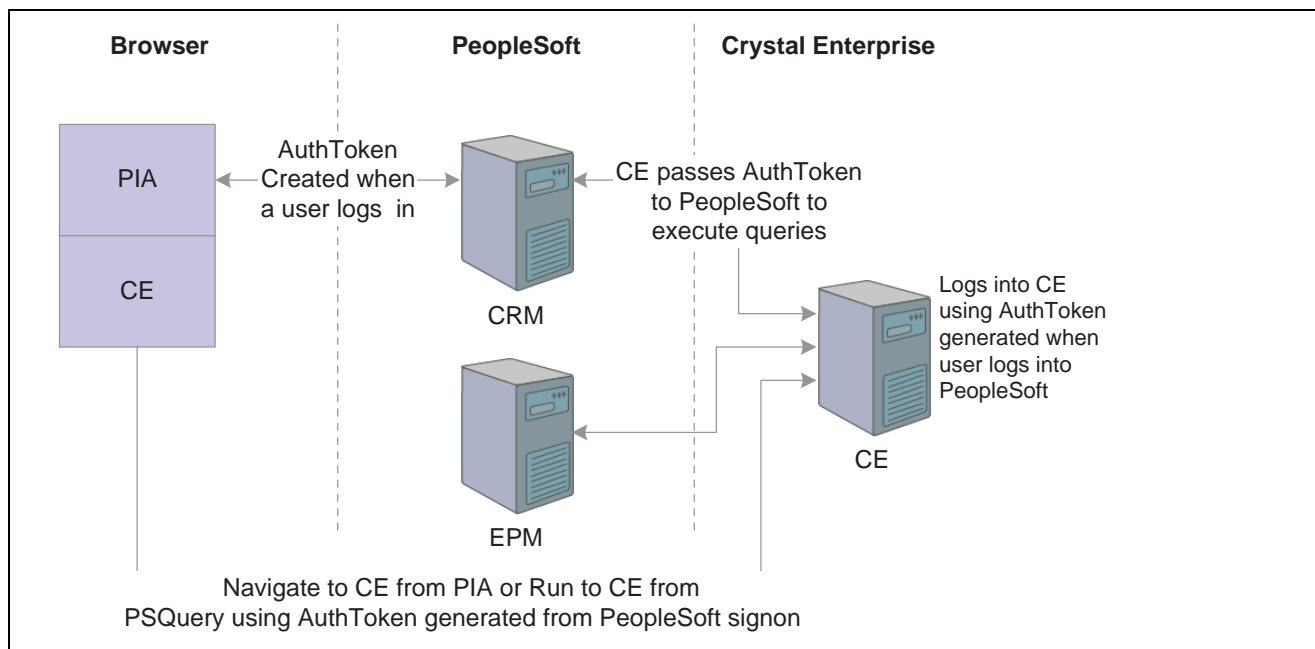
Security integration between Crystal Enterprise and PeopleSoft Pure Internet Architecture

See Also

Enterprise PeopleTools 8.46 PeopleBook: Security Administration, "Understanding PeopleSoft Security"

Crystal Enterprise Administrator's Guide

Understanding Single Signon, Trust Relationships and Group Membership in Crystal Enterprise for PeopleSoft Enterprise

This section discusses:

• Single signon

• Trust relationship between domains

• Group membership maintenance

Single Signon

Crystal Enterprise for PeopleSoft Enterprise supports single signon. Within the context of Crystal Enterprise for PeopleSoft Enterprise, single signon means that if you are accessing Crystal Enterprise from PeopleSoft Pure Internet Architecture, you are automatically authenticated in Crystal Enterprise. You don't need to sign in to Crystal Enterprise once you've signed in to PeopleSoft Enterprise.

Single signon is accomplished by synchronizing users and roles between PeopleSoft Enterprise and Crystal Enterprise. When a user logs on to the Crystal Enterprise from PeopleSoft Pure Internet Architecture, Crystal Enterprise calls the PeopleSoft QAS web services to retrieve user and role information from PeopleSoft and synchronizes with the user and role information in the Crystal Enterprise database. The Crystal Enterprise security plug-in enables the system to verify all logon requests that specify PeopleSoft Enterprise Authentication. The user names and passwords are authenticated against the Crystal Enterprise list.

Trust Relationship Between Domains

In addition to single signon, Crystal Enterprise for PeopleSoft Enterprise also allows active trust relationships between domains. As a result, users who have been authenticated in one domain are automatically recognized by another domain. Once the user has been authenticated and granted an active session, Crystal Enterprise provides seamless access to the resources throughout the system. For example, when a user first logs on to the PeopleSoft Customer Relationship Management (CRM) application, the system generates the PS_Token. If the same user wants to use the same PS_Token to execute query on the Enterprise Performance Management (EPM) application, CRM must be set up as a "trusted" node in the EPM system.

Dynamic Group Membership

The Crystal Enterprise security plug-in dynamically maintains PeopleSoft user and group listings. You can create a group based on the role, department, or location. Once you've synchronized the PeopleSoft group with Crystal Enterprise, all users that belong to the group can log on to Crystal Enterprise. When a new user is added to a group, the security plug-in dynamically creates an alias for that new user when the user signs on to Crystal Enterprise for the first time with valid credentials. If you make any subsequent changes to the group membership, you don't need to update the listing in Crystal Enterprise. For example, if you remove a user from a group, Crystal Enterprise immediately denies that user any further access. You don't need to perform any manual synchronization.

See Also

Enterprise PeopleTools 8.46 PeopleBook: Security Administration, "Setting up Digital Certificates and Single Signon," Setting Up Single Signon

Crystal Enterprise Administrator's Guide

CHAPTER 6

Configuring PeopleSoft Enterprise to Use Crystal Enterprise

This chapter discusses how to:

- Define permissions.
- Set up Query Access Services (QAS).

Defining Permissions

This section discusses how to:

- Set up Crystal Enterprise roles in PeopleSoft Enterprise.
- Set up Query profiles.
- Grant web library permissions.

Pages Used to Define Permissions

Page Name	Object Name	Navigation	Usage
User Profiles – Roles	USER_ROLES	PeopleTools, Security, User Profiles, User Profiles, Roles	Set up Crystal Enterprise roles.
Query Profile	SCRTY_QUERY_PROF	PeopleTools, Security, Permissions & Roles, Permission Lists, Query Click the Query Profile link.	Set up permissions to Run Reports, Run to Crystal and Run to Excel.
WebLib Permissions	ACL_WEBLIB_ACCESS	PeopleTools, Security, Permissions & Roles, Permission Lists, Web Libraries Click the Edit link.	Set up web library permission for your Query.

Setting Up Crystal Enterprise Roles in PeopleSoft Enterprise

Access the User Profiles - Roles page.
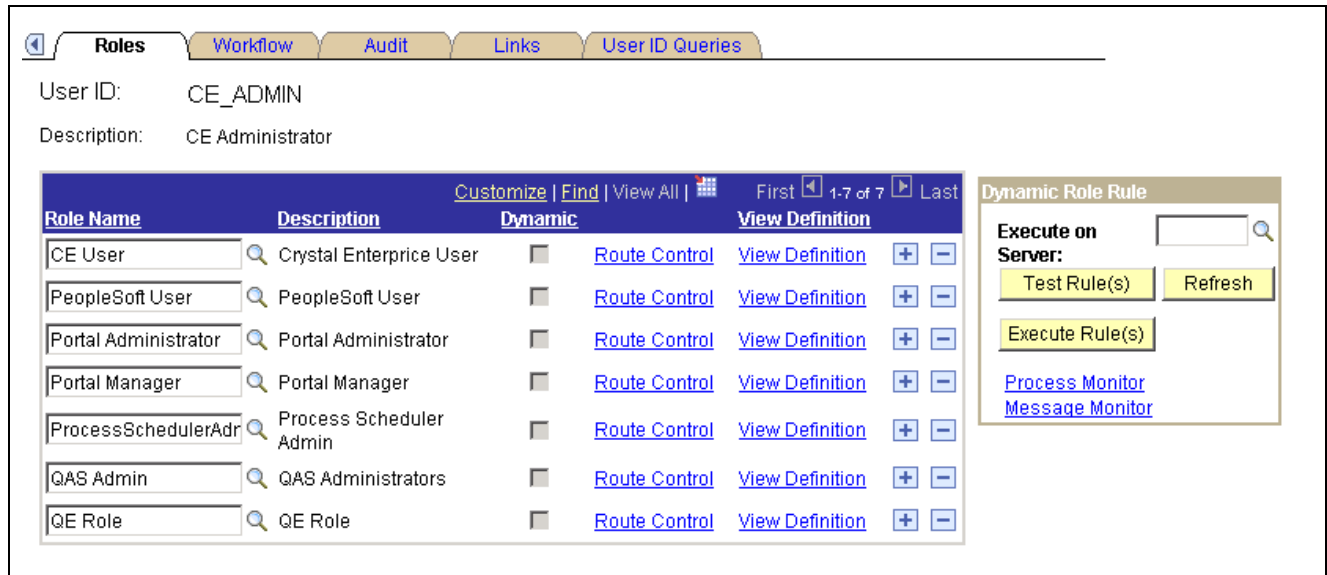
User Profiles - Roles page

In order to provide seamless security integration between PeopleSoft and Crystal Enterprise, a user must be assigned to a role:

• CE User

A user with this role can see the Run to Crystal link on the Query Manager search page or Query View page.

• QAS Admin

A user with this role can see the Launch the Admin Launchpad URL on the Launch Crystal Enterprise page.

Setting Up Query Profiles

Access the Query Profiles page.

Query Profiles page

In order for the Crystal and Excel links to appear on the Query Manager search page, you must select *Run to Excel* and *Run to Crystal* in the PeopleSoft Query Output section of the page.

Granting Web Libraries Permissions

In order for Crystal Enterprise to invoke any Query web service, it must be granted full access to the relevant iScript.

Weblib Permissions page

To grant Web Service access for the Query:

1. Access the Weblib Permission page.

2. In the Function column, select *Full Access* for the row labeled *ISCRIPT2.FieldFormula.IScript_ GetCrystalURL*.

3. Click OK to save your changes.

Setting Up QAS

This section provides an overview on QAS setup and discusses how to:

• Configure QAS

• Configure Crystal Enterprise

Understanding QAS Setup

Query Access Services are implemented using the PeopleTools Integration Broker (IB) framework. All the web services exposed by QAS are implemented as synchronous inbound messages using the IB framework. The Integration Gateway web application receives all the web services requests and forwards them to the Integration Engine (application server) for processing.

Note. For all QAS messages, a node called QAS_REMOTE that represents the requesting entity (Crystal Enterprise) is available. Currently, QAS does not support node level password for this node.

Pages Used to Set Up QAS

Page Name	Object Name	Navigation	Usage
Query Access Services	PSQASCONFIG	PeopleTools, Query Access Services, Configure, Query Access Services	Define the QAS Integration Gateways URL and the QAS results repository URL.
Crystal Enterprise	PSCECONFIG	PeopleTools, Query Access Services, Configure, Crystal Enterprise Reporting Tools, Crystal Enterprise, Launch Crystal Enterprise Click the Configure Crystal Enterprise link on the Launch Crystal Enterprise page.	Define the location of the Crystal Enterprise Report Explorer and the location of the Crystal Management Server (CMS).

Configuring QAS

Access the Query Access Services page.

Query Access Services

To set up QAS:

1. If you've defined the Integration Gateway default local node, the QAS URL is automatically pre-populated. This URL is synonymous to the one that you use to launch the Crystal Enterprise.

    Otherwise, go to the next step.

2. Click the Edit Integration Gateway URL to access the Gateways page where you can modify the Integration Gateway URL.

3. Click the Ping button to test the URL.

    If the test is successful, the system returns an XML response.

4. Enter the Query Access Services Result Repository URL.

    This URL is used to write the temporary query results into a file location that is specified in the IntegrationGateway.properties file.

    See *Enterprise PeopleTools 8.46 PeopleBook: Integration Broker*, "Managing Integration Gateways," Using the integrationGateway.properties File.

5. Click the corresponding Ping button to test the URL.

    If the test is successful, the system returns an XML response.

6. Enter the Max Query Size in megabytes. This parameter controls the maximum size of the query result set that you can fetch based on the size of QAS WSDL specifications.

    The default value is *500*.

7. Click Save to save the settings.

Note. All the URLs on this page are case sensitive, including the Edit Integration Gateway URLlink.

BEA Jolt Connect String Properties

QAS requires that appropriate BEA Jolt Connect String Properties must be configured in the Integration Gateway Properties file, so that incoming QAS requests can be routed to the correct receiving node (application server).

Either the Default BEA Jolt Connect String Properties or the BEA Jolt Connect String Properties for Known Nodes can be configured.

See *Enterprise PeopleTools 8.46 PeopleBook: Integration Broker*, "Managing Integration Gateways," Using the integrationGateway.properties File.

The following is an example of Default BEA Jolt Connect String Properties:

```
ig.isc.serverURL=//MYMACHINE:9000
ig.isc.userid=TOPDOG
ig.isc.password=VOBN5KcQZMg
ig.isc.toolsRel=8.46
```

One Gateway for Multiple Applications

You can use a single Gateway to configure multiple PeopleSoft applications and one webserver for multiple PeopleSoft applications. To specify multiple applications in one Gateway, you need to add the nodes corresponding to the applications to the *IntegrationGateway.properties* file.

The following example illustrates how you can specify multiple applications in *one* IntegrationGateway.properties file.

```
## default  node
ig.isc.serverURL=//PLE-KKO:9000
ig.isc.userid=QEDMO
ig.isc.password=5/SS3MfAFH4=
ig.isc.toolsRel=8.46-111-I1


## non-default node
ig.isc.FS_LOCAL.serverURL=//PLE-KKO1:9000
ig.isc.FS_LOCAL.userid=VP1
ig.isc.FS_LOCAL.password=Ez6NDsqOkxI=
ig.isc.FS_LOCAL.toolsRel=8.46-111-I1


## non-default node
ig.isc.HR_LOCAL.serverURL=//PLE-KKO2:9000
ig.isc.HR_LOCAL.userid=VP1
ig.isc.HR_LOCAL.password=Ez6NDsqOkxI=
ig.isc.HR_LOCAL.toolsRel=8.46-111-I1
```

In the above example, the default node doesn't specify any PeopleSoft application. However, in the non-default nodes, you can see that FS_LOCAL and HR_LOCAL are default nodes used by the Financial and Human Resource application, respectively.

Important! When you add a new domain in Crystal Enterprise, you need to specify the node name on the URL if you are not using the default node of the Gateway.

QAS Repository Location

QAS stores the query result files temporarily in the QAS repository. The location of QAS repository can also be specified in the *IntegrationGateway.properties File* by the following parameter:

```
ig.qas.repositoryHomeDir=<full-path for QAS Repository Location>
```

If this parameter is not configured, QAS stores the temporary files in the default location under the PSIGW web application, for example: `%PS_HOME%\webserv\peoplesoft\applications\peoplesoft\PSIGW`

See *Enterprise PeopleTools 8.46 PeopleBook: Integration Broker*, "Managing Integration Gateways," Using the integrationGateway.properties File.

Additional Configuration

For any additional Integration Gateway configuration such as security, refer to the *Enterprise PeopleTools 8.46 PeopleBook: PeopleSoft Integration Broker* .

See Also

Configuring Crystal Enterprise

Access the Crystal Enterprise page.

Crystal Enterprise page

To set up Crystal Enterprise in the PeopleSoft Pure Internet Architecture:

1. Enter the Crystal Enterprise Web Server URL (http://<machine name>:<port number).

    You can use this URL to access the Report Explorer and the Crystal Management Console.

2. If you want to access the Crystal Management Console (CMC) log on page directly, click either the URL link or the Ping button.

3. Enter the Crystal Management Server (CMS) machine name and port number.

    This URL is used to access the Crystal Enterprise CMS database.

4. Click the Ping button to test the CMS machine name.

    If the test is successful, the message "The Crystal Enterprise CMS database is up and running" appears.

5. The CE Domain Name is optional.

    You don't need to enter a domain name unless you have multiple domains.

    If you enter a domain name, you can see a read-only concatenation of the CE Domain name and your current PeopleSoft user ID at the bottom of the page, for example: *CRM\CEMGR*, when you tab out of the field.

6. Click Save to save your settings.

CHAPTER 7

Administering Crystal Enterprise for PeopleSoft Enterprise

This chapter provides an overview of the Crystal Management Console (CMC) and discusses how to:

• Log onto the CMC.

• Administer reports.

• Administer authentication.

• Administer license keys.

Understanding the CMC

The CMC enables you to manage the Crystal Enterprise System. As part of the PeopleSoft Enterprise integration, there are two areas that have modified behavior.

First, the Object information includes default information for logging onto the data sources automatically whenever a report is run.

Second, a PeopleSoft Enterprise tab has been added to the Authentication page. You use the PeopleSoft Enterprise tab to:

• Enable PeopleSoft Enterprise authentication.

• Set a default user and password.

• Add, delete, and set default domains.

• Add and delete roles.

• Set new alias options.

• Set update options.

• Set new user options.

Logging On to the CMC

This section discusses how to log on to the CMC.

Pages Used to Log On to the CMC

Page Name	Object Name	Navigation	Usage
Launch Crystal Enterprise	PSCENAV	Reporting Tools, Crystal Enterprise, Launch Crystal Enterprise Click the Launch Crystal Management Console (CMC) link.	Access the CMC log on page.
Crystal Enterprise	PSCECONFIG	PeopleTools, Query Access Services, Configure, Crystal Enterprise Click the Ping button or the URL in the Crystal Enterprise Web Server section.	Access the CMC log on screen.

Logging On to the CMC

Access the CMC log on screen.
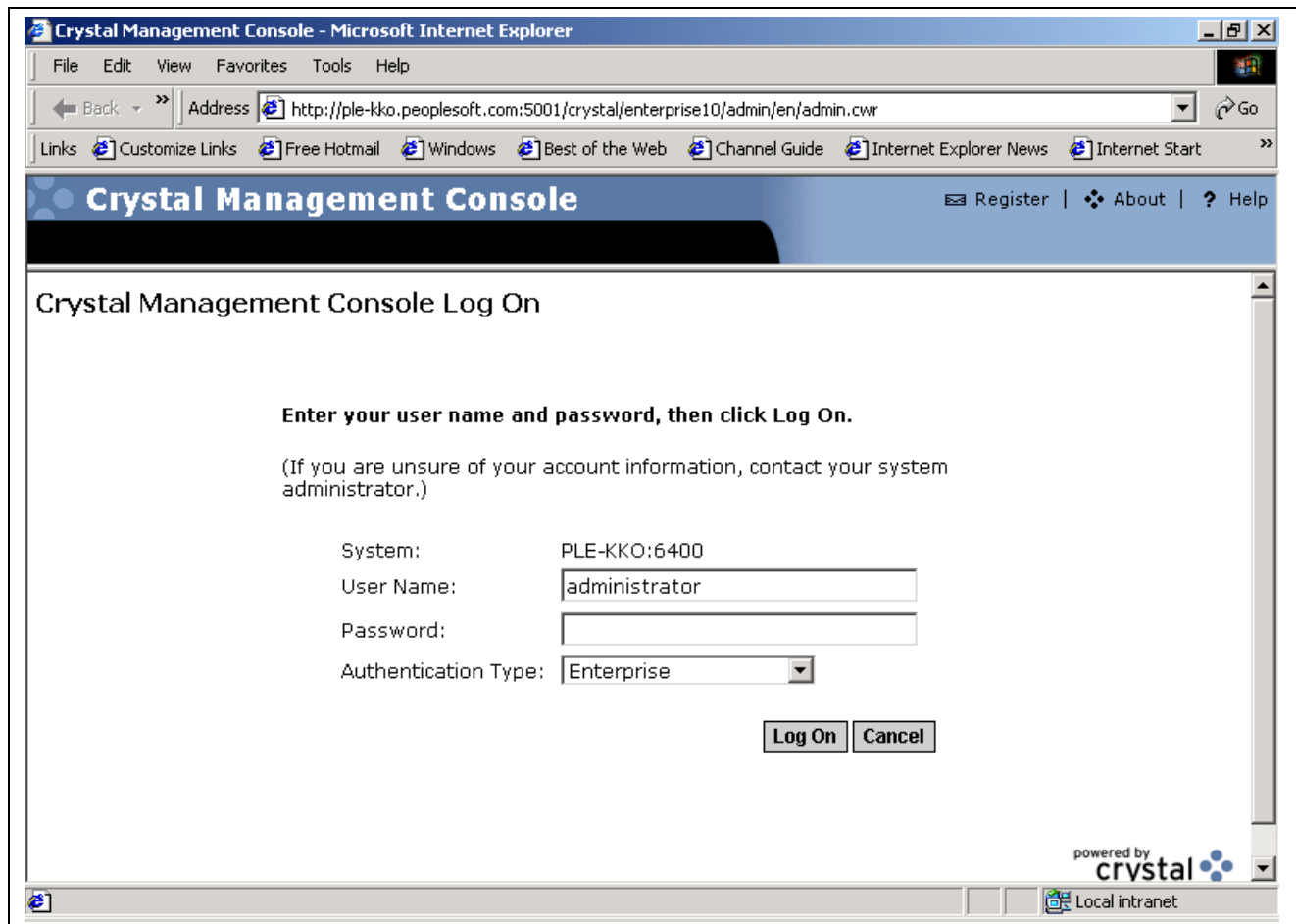
Crystal Management Console Log On screen

System	Displays the system and port entered in the format system:port.
User Name	Enter the name of the domain you wish to log on to and your PeopleSoft Enterprise user ID separated by a backslash; for example: CRM\USERID. If a default domain has been set for Crystal Enterprise, you can log on to the default domain by simply entering your user ID. Your user ID should be entered in upper case.

Note. This user must have the QAS Admin role as defined in the PeopleSoft Pure Internet Architecture.

Password	Enter the password for the administrator.
Authentication Type	Select *PeopleSoft Enterprise* to authenticate against PeopleSoft Enterprise.

Note. When you log on to the CMC for the first time, the default Authentication Type is *Enterprise*. In subsequent sessions, the system retains the last selection that you made.

Administering Reports

This section discusses how to administer data sources for Crystal Reports in Crystal Enterprise for PeopleSoft Enterprise.

Forms Used to Administer Reports

Page Name	Object Name	Navigation	Usage
Process-Database	N/A	After logging on to CMC, click the Objects link. Select a crystal report. Select the Process tab, and then click the Database button.	Set the default information for logging into the data source automatically whenever the report is run.

Administering Enterprise Settings for Reports

Access the Process-Database dialog.
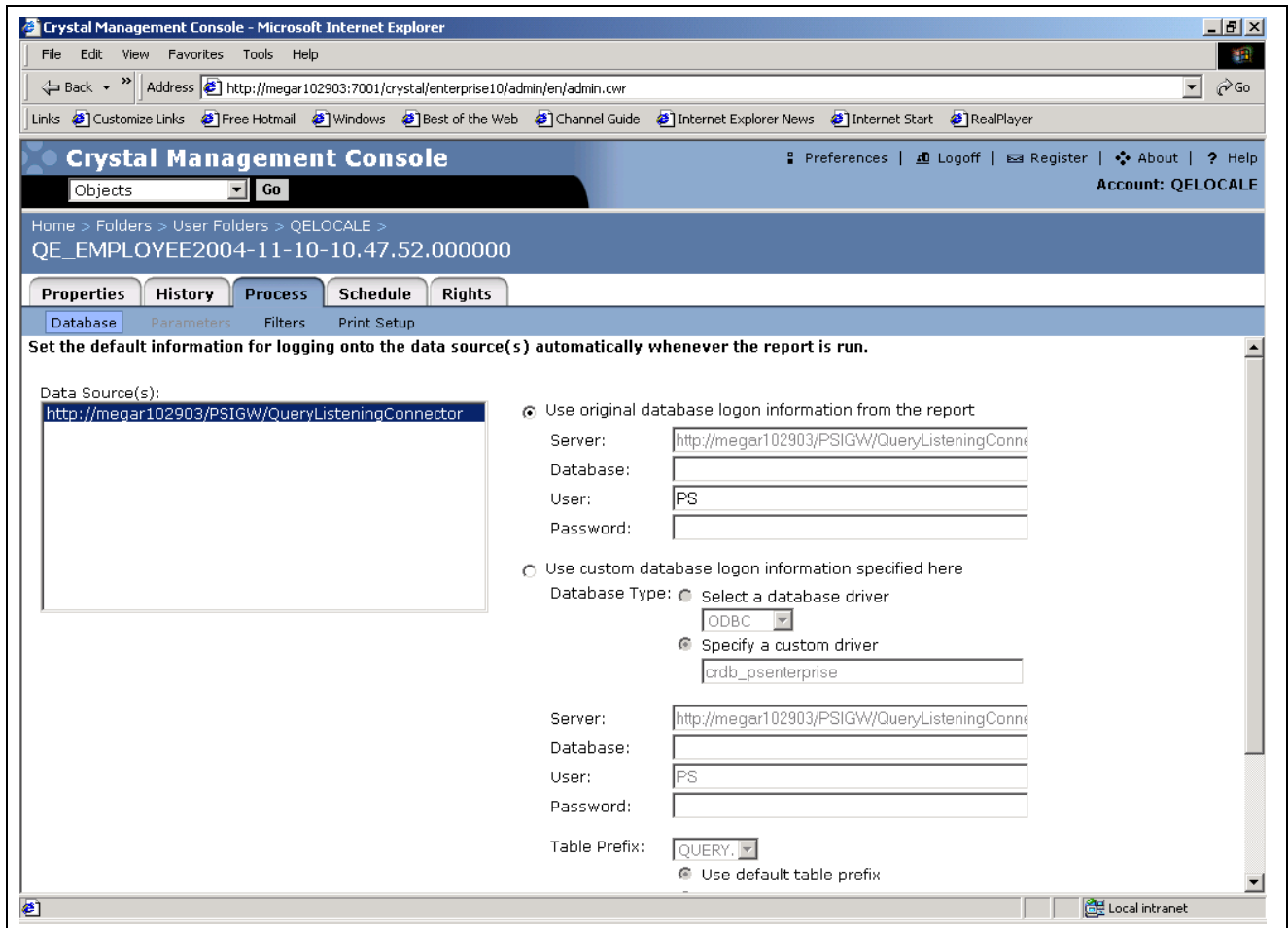
Process tab

Data Source(s)	Select each data source associated with the report. Data sources point to the database that provides data for your report. There may be more than one data source for a report, so select each data source and enter the log on information for it.
Use original database logon information from the report	Select this option if you do not wish to change the PeopleSoft Enterprise server and environment from which to run the report.
Server	Enter the name of the server set up for the default PeopleSoft Enterprise data source.
Database	Enter the name of the PeopleSoft Enterprise environment set up for the default PeopleSoft Enterprise data source.
User	Enter the PeopleSoft Enterprise user ID used to sign on to the PeopleSoft Enterprise data source when retrieving data for the report. Your user ID should be entered in upper case.
Password	Enter the password for the PeopleSoft Enterprise user ID specified above. The password can be left blank. If left blank, users will be prompted for their user name and password when they refresh the report.

Use custom database logon information specified here.	Select this option to point the report to a different PeopleSoft Enterprise data source than was originally associated with the report.
Database Type	In order to connect to an PeopleSoft Enterprise data source, keep the default selection of *Specify a custom driver*, *crdb_psenterprise*.
Server	Enter the name of the server and port (in the format server:port) to be used for the custom PeopleSoft Enterprise data source.
Database	Enter the name of the PeopleSoft Enterprise environment to be used for the custom PeopleSoft Enterprise data source.
User	Enter the PeopleSoft Enterprise user ID to be used to sign on to the custom PeopleSoft Enterprise data source
Password	Enter the password for the PeopleSoft Enterprise user ID specified above.
Table Prefix	For PeopleSoft Enterprise integration, do not enter a table prefix. Keep the default option of *Use default table prefix*.
Prompt the user for database logon when viewing	Select this option if you want users to be prompted for a password when they refresh a report.

Administering Authentication

This section discusses how to set up PeopleSoft Enterprise authentication.

Forms Used to Administer PeopleSoft Enterprise Authentication

Page Name	Object Name	Navigation	Usage
Authentication-PeopleSoft Enterprise	N/A,	After logging on to CMC, click the Authentication link. Select the PeopleSoft Enterprise tab,	Maps security from PeopleSoft Enterprise to Crystal Enterprise.

Using PeopleSoft Enterprise Authentication

Access the Authentication-PeopleSoft Enterprise tab.

PeopleSoft Enterprise tab

Enable PeopleSoft Enterprise Authentication	You must select this field to allow Crystal Enterprise to map to PeopleSoft Enterprise for security and authentication.
User	Enter a user ID to be used by Crystal Enterprise for PeopleSoft Enterprise to connect to all configured Enterprise servers. The user ID you enter must have the QAS Admin role and must be valid for all PeopleSoft Enterprise servers and environments defined in the domain section of this page. You should use an administrator user name. The user ID should be entered in upper case.
Password	Enter the password for the user ID entered in the line above. This password must be valid for all PeopleSoft Enterprise servers and environments defined in the domain section of this page. Furthermore, this field needs to be updated if the password for the system user changes.
New PeopleSoft Enterprise Domain	Enter any new domain you wish to add to the list of current domains. Enter the domain in the format <Domain Name>=http://<Gateway webserver name>:<port number>/PSIGW/QueryListeningConnector/<Node Name>, for example: `CRM=http://asanped083004.peoplesoft.com:8000/PSIGW/QueryListeningConnector/CRM_LOCAL`, where CRM_LOCAL is the default node for the CRM application (domain).

> **Note.** You can specify the node name in the IntegrationGateway.properties file. If the node name is not specified, the system uses the default node of the Gateway.

Current PeopleSoft Enterprise Domains	Add, delete, and define the current PeopleSoft Enterprise domains. The domain format is <Domain Name>=http://<Gateway webserver name>:<port number>/PSIGW/QueryListeningConnector/<Node Name>. If there are multiple domains, you can also assign a default domain in the next field.
Default PeopleSoft Enterprise Domain Name	Enter the domain Crystal Enterprise will use if you do not specify a domain when signing in to Crystal Enterprise.
New PeopleSoft Enterprise Role	Enter a new role to the list of current roles in the format DOMAIN\ROLE. Only users in a mapped role can log onto Crystal Enterprise.
Current PeopleSoft Enterprise Roles	Add and delete mapped PeopleSoft Enterprise roles. Only users who are in a mapped roles are allowed to sign in to Crystal Enterprise. A role is defined as the domain and role separated by a backslash; for example: DOMAIN\ROLE
Assign each added PeopleSoft Enterprise alias to an account with the same name	Select this option when users have an existing Crystal Enterprise account with the same name as their PeopleSoft Enterprise account. PeopleSoft Enterprise aliases are assigned to existing users. Users who do not have existing Crystal Enterprise accounts, or who do not have the same name in the Crystal Enterprise and PeopleSoft Enterprise accounts, are added as new users.
Create a new account for every added PeopleSoft Enterprise alias	Select this option to create a new account for each user. If users have already created accounts through the sign-up feature in the Crystal Enterprise web desktop, the users will have separate PeopleSoft Enterprise and Crystal Enterprise accounts.
New aliases will be added and new users will be created	Select this option to automatically create a new alias for every PeopleSoft Enterprise user mapped to Crystal Enterprise.
No new aliases will be added and new users will not be created	Select this option if the PeopleSoft Enterprise directory you are mapping contains many users, of which only a few will use Crystal Enterprise. Crystal Enterprise does not automatically create aliases and accounts for all users, but only for users who log onto Crystal Enterprise.
New users are created as named users	Select this option if new user accounts are configured to use named user licenses. Named user licenses are associated with specific users and enable people to access the system based on their user name and password. This provides named users with access to the system no matter how many other people are connected.
	When Crystal Enterprise for PeopleSoft Enterprise is shipped, it includes one named user license, which should be reserved for system use.
	> **Note.** If you select this option, you must have a named user license available for each user created.
New users are created as concurrent users	Select this option if new user accounts are configured to use concurrent user licenses. Concurrent licenses specify how many people can connect to Crystal

Enterprise at the same time. This licensing is very flexible because a small number of concurrent licenses can support a large user base.

When Crystal Enterprise for PeopleSoft Enterprise is shipped, it includes five concurrent licenses.

Setting Up Secure Connection

By default, the transmission of data between PeopleSoft servers and Crystal Enterprise over the internet is achieved through HTTP. To secure the connection, the following are valid options:

HTTPS in the URL

Using HTTPS in the URL allows for data encryption but no server authentication.

Server Authentication

If server authentication is desired, perform the following steps:

1. Update the registry *SSL Require Server Authentication* to *1*.

2. Update the registry *SSL Root Certificate File* to *<full path of certificate file>*.

3. Create the .pem file based on the following criteria:
   • If the certificate is already in PeopleSoft Enterprise, export the certificate to plain text.
   • If the certificate is acquired from Verisign, the certificate is sent in plain text format.
   • If the certificate is already in BEA WebLogic, use the *der2pem* utility to generate the certificate.

4. If there are multiple root certificates, append the certificates in the .pem file.

See Also

Enterprise PeopleTools 8.46 PeopleBook: Security Administration

Administering License Keys

This section discusses how to administer license keys.

Forms Used to Administer License Keys

Page Name	Object Name	Navigation	Usage
License Keys	N/A	From the Crystal Management Console, select License Keys.	To add, delete, and view license key information.

Working with License Key

Access the License Keys form.
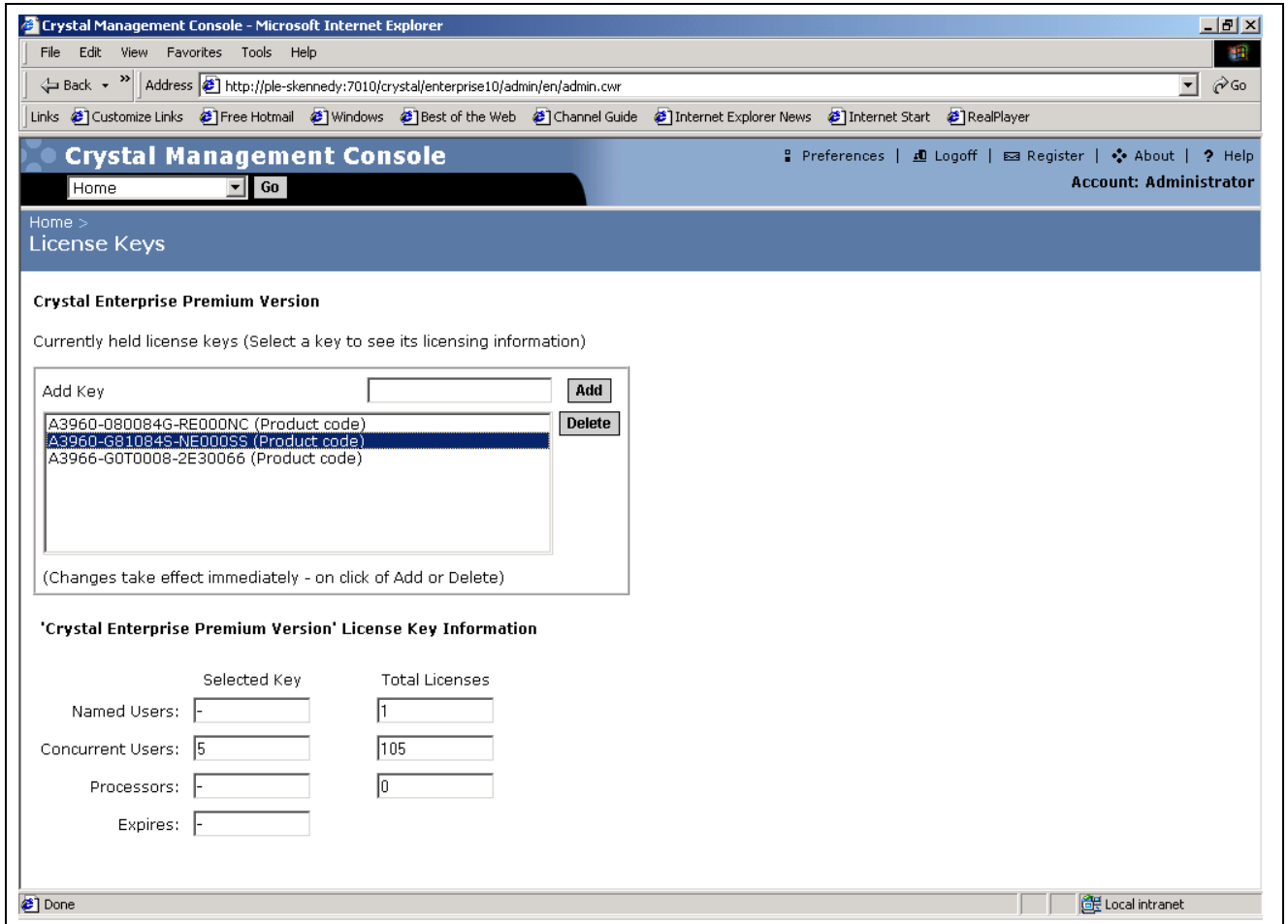
License Keys form

Named Users	Named user licenses enable the users to access the system based on their user name and password. Consequently, the system enables many people to connect as long as they have the proper user name and password.
Concurrent Users	Concurrent licenses determine the number of people who can connect to the Crystal Enterprise server at the same time. In Crystal Enterprise for PeopleSoft Enterprise, the maximum number of concurrent users is *5*, unless more licenses are obtained.
Processors	Processors specify the number of processors that are running Crystal Enterprise. You can determine the number of processor license by counting the number of processors running on Crystal Enterprise.

Note. Crystal Report for PeopleSoft Enterprise delivers some license keys as part of the installation. However, you can add or delete license keys as you deem necessary.

See Also

Crystal Enterprise Administrator's Guide

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, you should move your report files to a specific directory. You can then point the conversion utility to that directory.

Note. You should also back up your report files. If any problem occurs while you run this program, your report files may become corrupted.
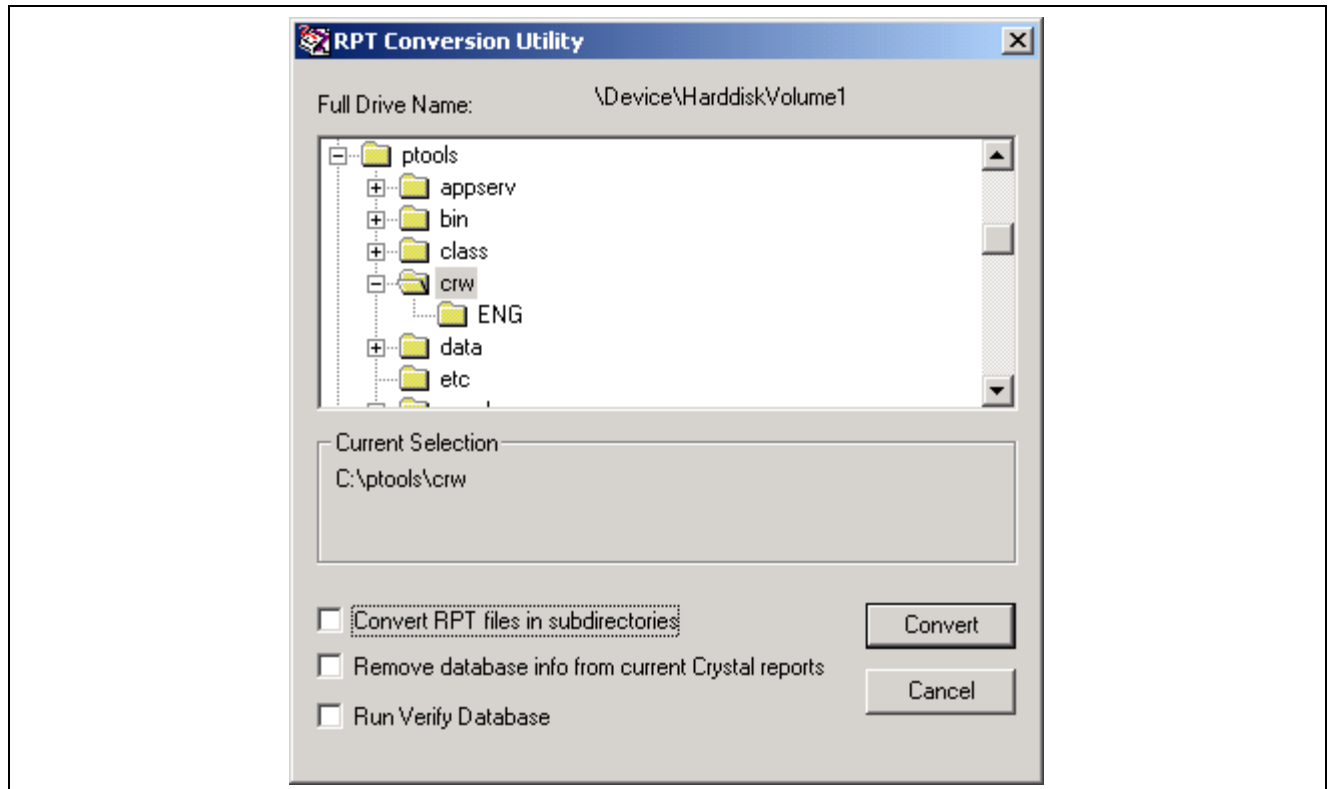
RPT Conversion Utility dialog box

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 default is 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 is automatically removed from older reports that are converted. After the conversion, reports that were successfully converted appear in the Files Converted list box.

3. Select Convert.

    If you have not signed into the PeopleSoft database, you are prompted to do so. After you successfully sign into a database, you can 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 default is 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.

    When it is complete, reports that were current and had the database information removed appear in the Files Converted list box, with a * to the left of the report name.

3. Select Convert.

    You can 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.

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.
academic career	In PeopleSoft Enterprise Campus Solutions, all course work that a student undertakes at an academic institution and that is grouped in a single student record. For example, a university that has an undergraduate school, a graduate school, and various professional schools might define several academic careers—an undergraduate career, a graduate career, and separate careers for each professional school (law school, medical school, dental school, and so on).
academic institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
academic organization	In PeopleSoft Enterprise Campus Solutions, an entity that is part of the administrative structure within an academic institution. At the lowest level, an academic organization might be an academic department. At the highest level, an academic organization can represent a division.
academic plan	In PeopleSoft Enterprise Campus Solutions, an area of study—such as a major, minor, or specialization—that exists within an academic program or academic career.
academic program	In PeopleSoft Enterprise Campus Solutions, the entity to which a student applies and is admitted and from which the student graduates.
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

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.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

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.

address usage

In PeopleSoft Enterprise Campus Solutions, a grouping of address types defining the order in which the address types are used. For example, you might define an address usage code to process addresses in the following order: billing address, dormitory address, home address, and then work address.

adjustment calendar

In PeopleSoft Enterprise Campus Solutions, the adjustment calendar controls how a particular charge is adjusted on a student's account when the student drops classes or withdraws from a term. The charge adjustment is based on how much time has elapsed from a predetermined date, and it is determined as a percentage of the original charge amount.

administrative function

In PeopleSoft Enterprise Campus Solutions, a particular functional area that processes checklists, communication, and comments. The administrative function identifies which variable data is added to a person's checklist or communication record when a specific checklist code, communication category, or comment is assigned to the student. This key data enables you to trace that checklist, communication, or comment back to a specific processing event in a functional area.

admit type

In PeopleSoft Enterprise Campus Solutions, a designation used to distinguish first-year applications from transfer applications.

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.

analysis database

In PeopleSoft Enterprise Campus Solutions, database tables that store large amounts of student information that may not appear in standard report formats. The analysis database tables contain keys for all objects in a report that an application program can use to reference other student-record objects that are not contained in the printed report. For instance, the analysis database contains data on courses that are considered for satisfying a requirement but that are rejected. It also contains information on

courses captured by global limits. An analysis database is used in PeopleSoft Enterprise Academic Advisement.

Application Messaging   PeopleSoft Application Messaging enables applications within the PeopleSoft Enterprise product family to communicate synchronously or asynchronously with other PeopleSoft and third-party applications. An application message defines the records and fields to be published or subscribed to.

AR specialist   Abbreviation for *receivables specialist.* 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.

audience   In PeopleSoft Enterprise Campus Solutions, a segment of the database that relates to an initiative, or a membership organization that is based on constituent attributes rather than a dues-paying structure. Examples of audiences include the Class of '65 and Undergraduate Arts & Sciences.

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.

billing career   In PeopleSoft Enterprise Campus Solutions, the one career under which other careers are grouped for billing purposes if a student is active simultaneously in multiple careers.

bio bit or bio brief   In PeopleSoft Enterprise Campus Solutions, a report that summarizes information stored in the system about a particular constituent. You can generate standard or specialized reports.

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 activity	The name of a subset of a detailed business process. This might be a specific transaction, task, or action that you perform in a business process.
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 process	A standard set of 17 business processes are defined and maintained by the PeopleSoft product families and are supported by Business Process Engineering group at PeopleSoft. An example of a business process is Order Fulfillment, which is a business process that manages sales orders and contracts, inventory, billing, and so forth.
	See also *detailed business process*.
business task	The name of the specific function depicted in one of the business processes.
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.
campus	In PeopleSoft Enterprise Campus Solutions, an entity that is usually associated with a distinct physical administrative unit, that belongs to a single academic institution, that uses a unique course catalog, and that produces a common transcript for students within the same academic career.
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.
category	In PeopleSoft Enterprise Campus Solutions, a broad grouping to which specific comments or communications (contexts) are assigned. Category codes are also linked to 3C access groups so that you can assign data-entry or view-only privileges across functions.
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.
checklist code	In PeopleSoft Enterprise Campus Solutions, a code that represents a list of planned or completed action items that can be assigned to a staff member, volunteer, or unit. Checklists enable you to view all action assignments on one page.
class	In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.
	See also *course.*
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 *sub-classification.*
clearance	In PeopleSoft Enterprise Campus Solutions, the period of time during which a constituent in PeopleSoft Contributor Relations is approved for involvement in an initiative or an action. Clearances are used to prevent development officers from making multiple requests to a constituent during the same time period.
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
cohort	In PeopleSoft Enterprise Campus Solutions, the highest level of the three-level classification structure that you define for enrollment management. You can define a cohort level, link it to other levels, and set enrollment target numbers for it.
	See also *population* and *division*.
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.
comm key	See *communication key.*
communication key	In PeopleSoft Enterprise Campus Solutions, a single code for entering a combination of communication category, communication context, communication method, communication direction, and standard letter code. Communication keys (also called *comm keys* or *speed keys*) can be created for background processes as well as for specific users.
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.
component interface	A component interface is a set of application programming interfaces (APIs) that you can use to access and modify PeopleSoft database information using a program instead of the PeopleSoft client.
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.
constituents	In PeopleSoft Enterprise Campus Solutions, friends, alumni, organizations, foundations, or other entities affiliated with the institution, and about which the institution maintains information. The constituent types delivered with PeopleSoft Enterprise Contributor Relations Solutions are based on those defined by the Council for the Advancement and Support of Education (CASE).
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 Campus Solutions, a specific instance of a comment or communication. One or more contexts are assigned to a category, which you link to 3C access groups so that you can assign data-entry or view-only privileges across functions.
	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.
course	In PeopleSoft Enterprise Campus Solutions, a course that is offered by a school and that is typically described in a course catalog. A course has a standard syllabus and credit level; however, these may be modified at the class level. Courses can contain multiple components such as lecture, discussion, and lab.
	See also *class*.
course share set	In PeopleSoft Enterprise Campus Solutions, a tag that defines a set of requirement groups that can share courses. Course share sets are used in PeopleSoft Enterprise Academic Advisement.

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 cube	In PeopleSoft Analytic Calculation Engine, a data cube is a container for one kind of data (such as Sales data) and works with in tandem with one or more dimensions. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and online analytical processing (OLAP) cubes in PeopleSoft Cube Manager.
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	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.
	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.
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.
detailed business process	A subset of the business process. For example, the detailed business process named Determine Cash Position is a subset of the business process called Cash Management.
dimension	In PeopleSoft Analytic Calculation Engine, a dimension contains a list of one kind of data that can span various contexts, and it is a basic component of an analytic model. Within the analytic model, a dimension is attached to one or more data cubes. In PeopleSoft Cube Manager, a dimension is the most basic component of an OLAP cube and specifies the PeopleSoft metadata to be used to create the dimension's rollup structure. Dimensions and data cubes in PeopleSoft Analytic Calculation Engine are unrelated to dimensions and OLAP cubes in PeopleSoft Cube Manager.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	In PeopleSoft Enterprise Campus Solutions, the lowest level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a division level, link it to other levels, and set enrollment target numbers for it.
	See also *population* and *cohort*.

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 *Enterprise Incentive Management ledger.* 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.
equity item limit	In PeopleSoft Enterprise Campus Solutions, the amounts of funds set by the institution to be awarded with discretionary or gift funds. The limit could be reduced by amounts equal to such things as expected family contribution (EFC) or parent contribution. Students are packaged by Equity Item Type Groups and Related Equity Item Types. This limit can be used to assure that similar student populations are packaged equally.
event	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.
	In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
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.

financial aid term	In PeopleSoft Enterprise Campus Solutions, a combination of a period of time that the school determines as an instructional accounting period and an academic career. It is created and defined during the setup process. Only terms eligible for financial aid are set up for each financial aid career.
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.
gap	In PeopleSoft Enterprise Campus Solutions, an artificial figure that sets aside an amount of unmet financial aid need that is not funded with Title IV funds. A gap can be used to prevent fully funding any student to conserve funds, or it can be used to preserve unmet financial aid need so that institutional funds can be awarded.
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.
gift table	In PeopleSoft Enterprise Campus Solutions, a table or so-called *donor pyramid* describing the number and size of gifts that you expect will be needed to successfully complete the campaign in PeopleSoft Contributor Relations. The gift table enables you to estimate the number of donors and prospects that you need at each gift level to reach the campaign goal.
GL business unit	Abbreviation for *general ledger business unit.* A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books. See also *business unit*.
GL entry template	Abbreviation for *general ledger entry template.* In PeopleSoft Enterprise Campus Solutions, a template that defines how a particular item is sent to the general ledger. An item-type maps to the general ledger, and the GL entry template can involve multiple general ledger accounts. The entry to the general ledger is further controlled by high-level flags that control the summarization and the type of accounting—that is, accrual or cash.
GL Interface process	Abbreviation for *General Ledger Interface process.* In PeopleSoft Enterprise Campus Solutions, a process that is used to send transactions from PeopleSoft Enterprise Student Financials to the general ledger. Item types are mapped to specific general ledger accounts, enabling transactions to move to the general ledger when the GL Interface process is run.
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.
initiative	In PeopleSoft Enterprise Campus Solutions, the basis from which all advancement plans are executed. It is an organized effort targeting a specific constituency, and it can occur over a specified period of time with specific purposes and goals. An initiative can be a campaign, an event, an organized volunteer effort, a membership drive, or any other type of effort defined by the institution. Initiatives can be multipart, and they can be related to other initiatives. This enables you to track individual parts of an initiative, as well as entire initiatives.
inquiry access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user only to view data.
	See also *update access*.
institution	In PeopleSoft Enterprise Campus Solutions, an entity (such as a university or college) that is independent of other similar entities and that has its own set of rules and business processes.
integration	A relationship between two compatible integration points that enables communication to take place between systems. Integrations enable PeopleSoft applications to work seamlessly with other PeopleSoft applications or with third-party systems or software.
integration point	An interface that a system uses to communicate with another PeopleSoft application or an external application.
integration set	A logical grouping of integrations that applications use for the same business purpose. For example, the integration set ADVANCED_SHIPPING_ORDER contains all of the integrations that notify a customer that an order has shipped.
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.
	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
item shuffle	In PeopleSoft Enterprise Campus Solutions, a process that enables you to change a payment allocation without having to reverse the payment.
joint communication	In PeopleSoft Enterprise Campus Solutions, one letter that is addressed jointly to two people. For example, a letter might be addressed to both Mr. Sudhir Awat and Ms. Samantha Mortelli. A relationship must be established between the two individuals in the database, and at least one of the individuals must have an ID in the database.
keyword	In PeopleSoft Enterprise Campus Solutions, a term that you link to particular elements within PeopleSoft Student Financials, Financial Aid, and Contributor Relations. You can use keywords as search criteria that enable you to locate specific records in a search dialog box.

KPI	An abbreviation for *key performance indicator.* 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 *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* 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 *rates*) 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.
LMS	Abbreviation for *learning management system.* In PeopleSoft Enterprise Campus Solutions, LMS is a PeopleSoft Student Records feature that provides a common set of interoperability standards that enable the sharing of instructional content and data between learning and administrative environments.
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 *1*—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.
mass change	In PeopleSoft Enterprise Campus Solutions, mass change is a SQL generator that can be used to create specialized functionality. Using mass change, you can set up a series of Insert, Update, or Delete SQL statements to perform business functions that are specific to the institution.
	See also *3C engine*.
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 *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* 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	Metastrings are special expressions included in SQL string literals. The metastrings, 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.
need	In PeopleSoft Enterprise Campus Solutions, the difference between the cost of attendance (COA) and the expected family contribution (EFC). It is the gap between the cost of attending the school and the student's resources. The financial aid package

is based on the amount of financial need. The process of determining a student's need is called *need analysis.*

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 *compensation object.*

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.

payment shuffle In PeopleSoft Enterprise Campus Solutions, a process allowing payments that have been previously posted to a student's account to be automatically reapplied when a higher priority payment is posted or the payment allocation definition is changed.

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 component processor. PeopleCode generates results based on existing data or user actions. By using various tools provided with PeopleTools, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event See *event.*

PeopleSoft Pure 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.

person of interest A person about whom the organization maintains information but who is not part of the workforce.

personal portfolio In PeopleSoft Enterprise Campus Solutions, the user-accessible menu item that contains an individual's name, address, telephone number, and other personal information.

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.
population	In PeopleSoft Enterprise Campus Solutions, the middle level of the three-level classification structure that you define in PeopleSoft Enterprise Recruiting and Admissions for enrollment management. You can define a population level, link it to other levels, and set enrollment target numbers for it. See also *division* and *cohort*.
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.
primacy number	In PeopleSoft Enterprise Campus Solutions, a number that the system uses to prioritize financial aid applications when students are enrolled in multiple academic careers and academic programs at the same time. The Consolidate Academic Statistics process uses the primacy number indicated for both the career and program at the institutional level to determine a student's primary career and program. The system also uses the number to determine the primary student attribute value that is used when you extract data to report on cohorts. The lowest number takes precedence.
primary name type	In PeopleSoft Enterprise Campus Solutions, the name type that is used to link the name stored at the highest level within the system to the lower-level set of names that an individual provides.

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	A PeopleSoft or third-party product. PeopleSoft organizes its software products into product families and product lines. Interactive Services Repository contains information about every release of every product that PeopleSoft sells, as well as products from certified third-party companies. These products are displayed with the product name and release number.
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.
product family	A group of products that are related by common functionality. The family names that can be searched using Interactive Service Repository are PeopleSoft Enterprise, PeopleSoft EnterpriseOne, PeopleSoft World, and third-party, certified PeopleSoft partners.
product line	The name of a PeopleSoft product line or the company name of a third-party certified partner. Integration Services Repository enables you to search for integration points by product line.
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.

prospects	In PeopleSoft Enterprise Campus Solutions, students who are interested in applying to the institution.
	In PeopleSoft Enterprise Contributor Relations, individuals and organizations that are most likely to make substantial financial commitments or other types of commitments to the institution.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
rating components	In PeopleSoft Enterprise Campus Solutions, variables used with the Equation Editor to retrieve specified populations.
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 *record input value-added tax flag.* 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 *record output value-added tax flag.*
	See *record input VAT flag.*
recname	The name of a record that is used to determine the associated field to match a value or set of values.
recognition	In PeopleSoft Enterprise Campus Solutions, the recognition type indicates whether the PeopleSoft Enterprise Contributor Relations donor is the primary donor of a commitment or shares the credit for a donation. Primary donors receive hard credit that must total 100 percent. Donors that share the credit are given soft credit. Institutions can also define other share recognition-type values such as memo credit or vehicle credit.
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 *real-time event notification server* 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.
reversal indicator	In PeopleSoft Enterprise Campus Solutions, an indicator that denotes when a particular payment has been reversed, usually because of insufficient funds.
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.
SCP SCBM XML message	Abbreviation for *Supply Chain Planning Supply Chain Business Modeler Extensible Markup Language message.* PeopleSoft EnterpriseOne Supply Chain Business Modeler uses XML as the format for all data that it imports and exports.
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.
search/match	In PeopleSoft Enterprise Campus Solutions and PeopleSoft Enterprise Human Resources Management Solutions, a feature that enables you to search for and identify duplicate records in the database.
seasonal address	In PeopleSoft Enterprise Campus Solutions, an address that recurs for the same length of time at the same time of year each year until adjusted or deleted.
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.
service impact	In PeopleSoft Enterprise Campus Solutions, the resulting action triggered by a service indicator. For example, a service indicator that reflects nonpayment of account balances by a student might result in a service impact that prohibits registration for classes.
service indicator	In PeopleSoft Enterprise Campus Solutions, indicates services that may be either withheld or provided to an individual. Negative service indicators indicate holds that prevent the individual from receiving specified services, such as check-cashing privileges or registration for classes. Positive service indicators designate special services that are provided to the individual, such as front-of-line service or special services for disabled students.
session	In PeopleSoft Enterprise Campus Solutions, time elements that subdivide a term into multiple time periods during which classes are offered. In PeopleSoft Contributor Relations, a session is the means of validating gift, pledge, membership, or adjustment data entry . It controls access to the data entered by a specific user ID. Sessions are balanced, queued, and then posted to the institution's financial system. Sessions must be posted to enter a matching gift or pledge payment, to make an adjustment, or to process giving clubs or acknowledgements.
	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 key process	In PeopleSoft Enterprise Campus Solutions, a process that relates a particular transaction to the source of the charge or financial aid. On selected pages, you can drill down into particular charges.
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.
speed key	See *communication key.*
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.
standard letter code	In PeopleSoft Enterprise Campus Solutions, a standard letter code used to identify each letter template available for use in mail merge functions. Every letter generated in the system must have a standard letter code identification.
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 *basis* 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.

tax authority	In PeopleSoft Enterprise Campus Solutions, a user-defined element that combines a description and percentage of a tax with an account type, an item type, and a service impact.
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.
third party	A company or vendor that has extensive PeopleSoft product knowledge and whose products and integrations have been certified and are compatible with PeopleSoft applications.
3C engine	Abbreviation for *Communications, Checklists, and Comments engine.* In PeopleSoft Enterprise Campus Solutions, the 3C engine enables you to automate business processes that involve additions, deletions, and updates to communications, checklists, and comments. You define events and triggers to engage the engine, which runs the mass change and processes the 3C records (for individuals or organizations) immediately and automatically from within business processes.
3C group	Abbreviation for *Communications, Checklists, and Comments group.* In PeopleSoft Enterprise Campus Solutions, a method of assigning or restricting access privileges. A 3C group enables you to group specific communication categories, checklist codes, and comment categories. You can then assign the group inquiry-only access or update access, as appropriate.
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.
tuition lock	In PeopleSoft Enterprise Campus Solutions, a feature in the Tuition Calculation process that enables you to specify a point in a term after which students are charged a minimum (or *locked*) fee amount. Students are charged the locked fee amount even if they later drop classes and take less than the normal load level for that tuition charge.

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.
update access	In PeopleSoft Enterprise Campus Solutions, a type of security access that permits the user to edit and update data.
	See also *inquiry access.*
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 *value-added tax exception.* 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 *value-added tax exempt.* 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 *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* 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.
worker	A person who is part of the workforce; an employee or a contingent worker.
workset	A group of people and organizations that are linked together as a set. You can use worksets to simultaneously retrieve the data for a group of people and organizations and work with the information on a single page.
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 link The XML Linking language enables you to insert elements into XML documents to create a links between resources.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

XPI Abbreviation for *eXtended Process Integrator*. PeopleSoft XPI is the integration infrastructure that enables both real-time and batch communication with EnterpriseOne applications.

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 *zero-rated value-added tax*. 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.

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