PeopleSoft®

PeopleTools 8.42
Reporting and Analysis Tools
Crystal Reports for PeopleSoft

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Reporting and Analysis Tools
Crystal Reports for PeopleSoft
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Contents

About This PeopleBook

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

This preface discusses:

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

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

See *Using PeopleSoft Applications.*

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

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

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

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

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 PeopleSoft Press Website under the Ordering PeopleBooks topic. The PeopleSoft Press Website is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection Website, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

The following table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
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 number 0, not 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 W.
`Monospace font`	Indicates a PeopleCode program or other code example.
(quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (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.
(ISO)	Information that applies to a specific country, to the U.S. federal government, or to the education and government market, is preceded by a three-letter code in parentheses. The code for the U.S. federal government is USF; the code for education and government is E&G, and the country codes from the International Standards Organization are used for specific countries. Here is an example: (GER) If you're administering German employees, German law requires you to indicate special nationality and citizenship information for German workers using nationality codes established by the German DEUEV Directive.
Cross-references	PeopleBooks provide cross-references either below 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.

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.

A note that is preceded by *Important!* 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.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date The last date for which a report or process includes data.

Business Unit An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description Enter up to 30 characters of text.

Effective Date The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run** Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

See Also

Using PeopleSoft Applications

PeopleSoft Process Scheduler

Crystal Reports for PeopleSoft Preface

This preface provides a general overview of the contents discussed in Crystal Reports for PeopleSoft.

Crystal Reports for PeopleSoft

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

CHAPTER 1

Using Crystal Reports

This chapter describes how to:

- Configure Crystal Reports.
- Create and format new Crystal reports.
- Run Crystal reports.

Note. Crystal Reports has many more features than are described in this chapter. See your Crystal Decision's Crystal Reports documentation for information.

Understanding Crystal Reports For PeopleSoft

Crystal Reports from Crystal Decisions 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.

Generating formatted output in Crystal involves two steps. First you create and save queries in PeopleSoft Query, and then you create report definitions in Crystal to format the fields (columns) used in the queries. Once you've created and saved the report definitions, you can print reports that are easy to read and understand. You can generate reports in a variety of different formats, including ASCII files, Microsoft Word documents, and spreadsheets.

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 from your database. 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.

Crystal reports in PeopleTools are language-sensitive.

See *PeopleTools Global Technology*, "Global Reporting and Analysis".

Note. If you are using the Process Scheduler Server, you do not have to install Crystal 8.5. All files required by the Process Scheduler server to run existing Crystal reports will be installed automatically by the Process Scheduler server. There are no additional files to install. If you are developing reports using Crystal, then you will need to install the Crystal development tools.

See Also

Crystal Decision's Crystal Reports documentation

Configuring Crystal Reports

This section describes how to set Crystal Reports options in PeopleSoft Configuration Manager, including:

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

Select Start, Programs, PeopleTools Program Group, Configuration Manager to access PeopleTools Configuration Manager.

Specifying Crystal/Business Interlink Options

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

Crystal EXEs Path

If you have Crystal installed locally on the workstation, the Crystal EXEs Path will be populated automatically. But, if you have Crystal installed on a network drive, then the Crystal EXEs Path parameter should be set to reflect the location of the Crystal Reports executables. For example: *n:\hr800\bin\client\winx86\crystal*

Default Crystal Reports

Since you can create customized reports with Crystal, the Default Crystal Reports option allows you to specify the default location of such reports. If this option does not apply to your site's Crystal implementation, you can disregard this parameter.

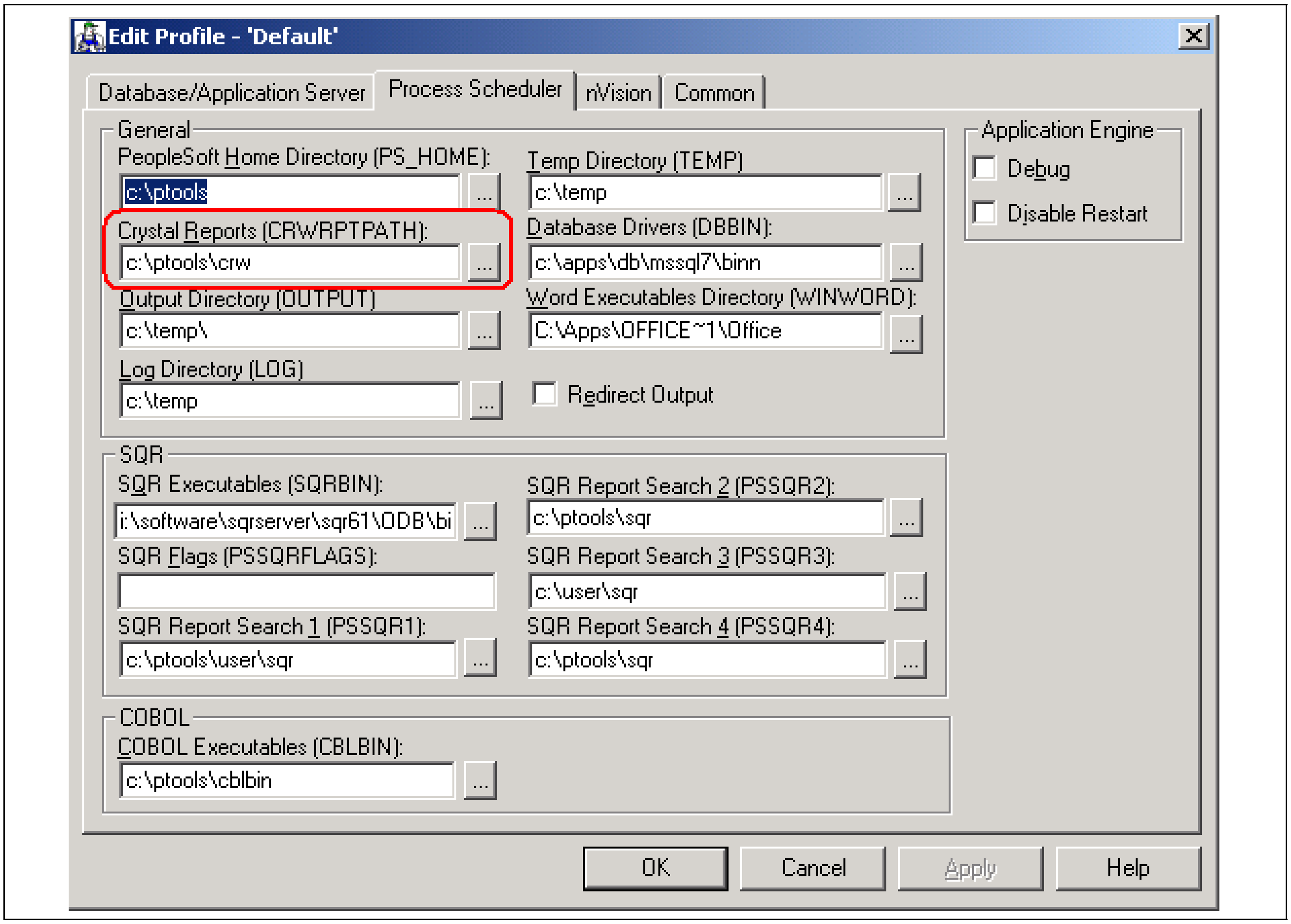
Note. When creating a Crystal report from PeopleSoft Query, and this path is invalid, an error message will be displayed. If a path is not specified, PeopleSoft Query tries to write the file to the your language directory beneath the CRWRPTPATH directory.

Use trace during execution

When selected, Crystal will write the trace statements to a log file you specify in Trace File field. This file is written to the workstation's %TEMP% directory.

Specifying Path for Production Crystal Reports

Select Profile, select a profile to edit, then select the Process Scheduler tab.



Configuration Manager - Process Scheduler Settings

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

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

Running Client Setup

As part of the PeopleSoft installation process the workstations need to be configured to run successfully with your PeopleSoft system. The Client Setup tab is where you select many of the options that will affect workstations as well as invoke the Client Setup process. For example, on this tab you choose which shortcuts will appear on a workstation desktop. Keep in mind that this is not the only tab that contains essential values for the PeopleSoft workstation. You should also make sure that all of the tabs reflect the correct values for your site, especially the Startup tab and the Process Scheduler tab for the Default profile.

The Client Setup tab does the following:

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

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

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

These Client Setup functions are performed when you press OK or Apply from 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. 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 we will refer to it by its default name,*PeopleSoft 8.4.*
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 will uninstall any existing shortcuts in the PeopleSoft 8 program group, and install shortcuts for the applications you have selected. If you subsequently want to install or uninstall shortcuts, you can always re-run Client Setup.
4. Select the *Install PeopleSoft ODBC Driver* check box if you wish to install the PeopleSoft ODBC driver and set up a user ODBC data source name required by PeopleSoft Open Query and by Crystal Reports.
5. Select the *Install Workstation* check box.

   This check box determines whether Client Setup runs when you click *Apply* or *OK* in Configuration Manager. If this box is not selected, Client Setup will create or update settings in the registry, but it won't 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.
   - You can press ODBC Administrator to directly access the Microsoft ODBC Administrator to verify the installation and configuration of the ODBC DSN.
   - If you install the ODBC Driver Manager 3.5, reboot the workstation after running Client Setup.
7. To view a list of the files installed and actions taken by Client Setup, you can open the psinstal.log file in your Temp directory.

Logging in to a PeopleSoft Database

When you open Crystal Reports and either create a report or run a report for the first time in that session, Crystal prompts you to log on to PeopleSoft. (You must log in to a PeopleSoft database before you can generate a PeopleSoft report from Crystal Reports.) After successfully logging in to a database, you have full reporting flexibility.

Creating and Formatting Crystal Reports

This section describes how to:

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

Common Elements Used in This Section

Click the Refresh button to refresh your data with any recent changes.

Click the Save button to save your report to disk.

Click the Print Preview button to see your report as it will appear when you print it.

Click the Print button to print your report.

Creating Crystal Reports

To create a new report using Crystal:

1. Select Start, Programs, Crystal Reports 8.5 for PeopleSoft, Crystal Reports for PeopleSoft to display the Crystal Reports window.
2. From the Crystal Reports window, click the New Report button or select File, New.

   The Report Gallery dialog box appears.
3. Click the Using the Report Expert radio button to guide you through the creation of a typical report.
4. Click the OK button.

   The Report Expert dialog box appears.
5. Click the Database button.

   The Data Explorer dialog box appears.

6. Click the + sign to the left of the ODBC folder to display its contents.
7. Scroll down to the PeopleSoft PeopleTools folder and click its + sign to display a list of queries.

   The list contains all the queries from which you can create a report. If you have both a Private and Public query with the same name, you see only the Private query.

   The PeopleSoft Signon dialog box appears.
8. Log in to a PeopleSoft database to establish a connection between Crystal and the database.
9. Highlight a query from the list and click the Add button.

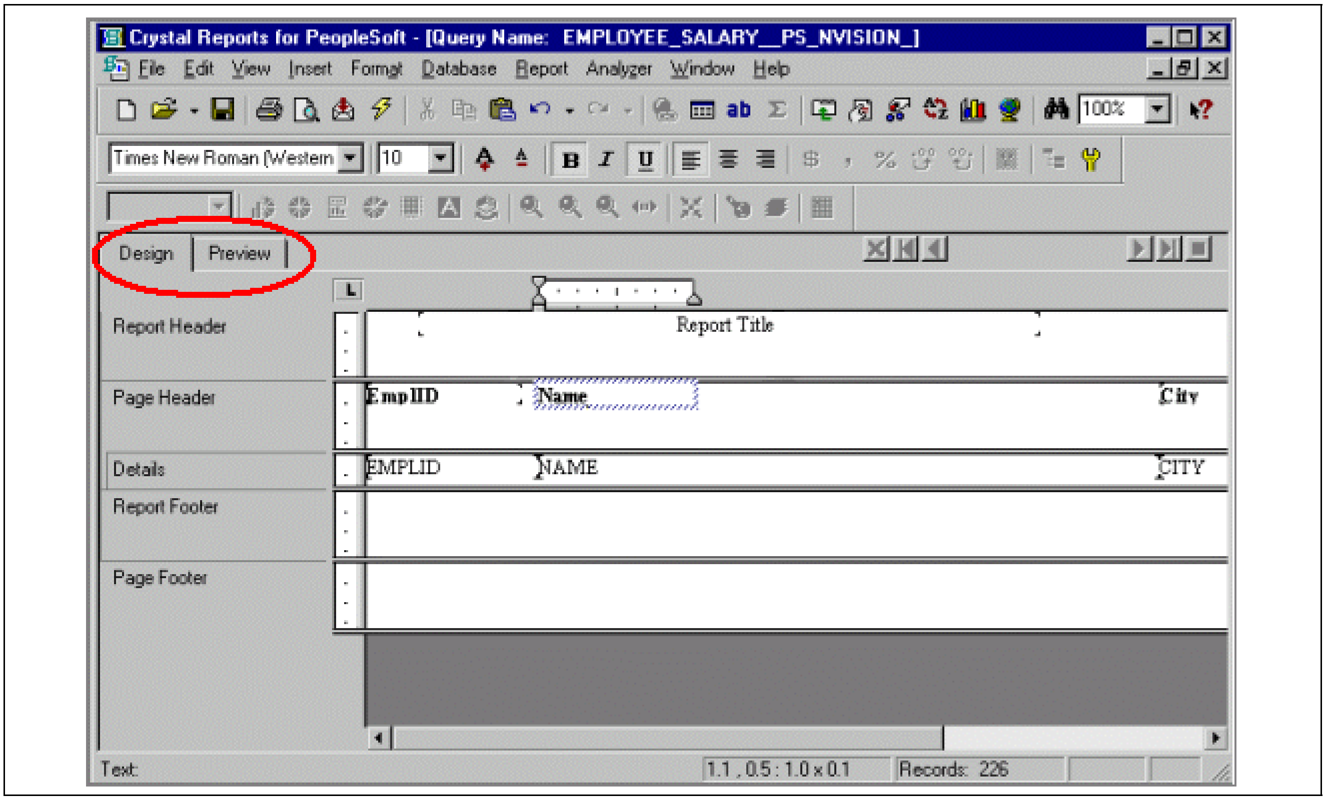
   A green checkmark appears to the left of the selected query, indicating that it has been added.
10. You can select additional queries if necessary. When you have completed your selections, click the Close button to return to the Report Expert dialog box.
11. Click the Next button to go to the Fields tab.
12. Select all the fields that you want to appear on your report.

    Highlight one or more fields and click the Add button, or click the Add All button to add all the fields from the query.

    When fields have been added, the Remove, Remove All, Next ,and Finish buttons become active.
13. (Optional). Add one or more of the following options.
    - *Group:* Sort records by their values on the Group By fields.
    - *Total:* Add summary information to break the sorted records into groups. For each group, choose one or more fields to summarize.
    - *Top N:* Sort the groups based on the summarized totals. The groups on the report can be sorted based on their values for the selected summarized fields.
    - *Chart:* Include a chart on the report. Select a chart type and the data you want the chart to represent.
    - *Select:* Select a subset of information. The data can be filtered so that only a subset appears on the report.
    - *Style:* Select a formatting style for the report, add a title, or browse for a picture (for example, company logo).
14. Click Finish and go to the New Report Template page to format your report.

Formatting Crystal Reports

Access Crystal Report's New Report Template page.



New report template

To format a new report using Crystal Reports:

1. Go to the New Report Template page.

   The New Report Template window appears in Preview mode.

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

2. Click the Design tab to continue formatting.

3. Enter the appropriate values:

   - *Report Header:* Enter the title of the report and other information you want to appear at the top of the first page.
   - *Page Header:* Enter or modify the column headings and other identifying information you want displayed at the top of each page.
   - *Details:* This is main section of the report, where the rows of data from your database will appear.
   - *Report Footer:* Enter information 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 you want to appear at the bottom of the page.

4. Click the Preview tab to preview your report.

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

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

See Crystal Decision's Crystal Reports documentation

Adding Subreports

A subreport is a report within a report. It has all of the characteristics of a report except that it can not itself include a subreport. Subreports can be free-standing, or they can be linked to the data in the primary report. Crystal Reports enables you to insert as many subreports as you wish.

Linking a Subreport to the Main Report

When you insert a sub-report, Crystal will automatically create a parameter field to link the subreport to the main report. This is called an Implicit Link situation. Depending on the needs required for the subreport, you may need to change this parameter. For instance, you may want the main report to pass in a summary value that can be used in calculations by the subreport, or you may want the main report to pass in the title of the subreport. When you link a field in the main report to a parameter field that you have created in the subreport, it's called an Explicit Link situation.

To change the subreport link:

1. Right-click on the subreport on the Crystal Reports – Report Template page.
2. Select *Change Subreport Links* to display the Subreport Links dialog window
3. 3. Click the *Subreport parameter field to use* dropdown list.

   A small scroll bar will display.
4. 4. Scroll to select the parameter field from the subreport.
5. 5. Select the *OK* button to save your change.

See Crystal Decision's 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've just created in Crystal Reports every time you print the report. If you always update and print the report from within Crystal Reports, it doesn't matter.

To print HTML reports from Crystal, open an HTML file and print it from the browser. Crystal uses the default page setting to print the report. Sometimes, this will result in the right side of the report being 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.

For example, you can enter 0.15” for both margins, to ensure that the entire report prints correctly.

Modifying Crystal Reports Defaults

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

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

Changing Crystal Default Column Headings and Report Titles

To edit column headings:

1. In the Page Header section, highlight the heading you want to change, then either double-click the text object or select Edit, Text Object..

   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, 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’ll need to enlarge the text box to fit the heading.

Changing Fonts

To change a report title’s font attributes:

1. Make sure the title is selected and select Format, Font.

   The Format Editor dialog box appears.

2. Choose the *font, style, size,* and *color* you like.

Adding a Print Date Field

To add a print date field:

1. Select Insert, Special Field to display the Field Explorer..
2. Drag the Print Date field from the Field Explorer to the Report Header of the report.

   A box with Print Date appears where you dragged.

   To modify the format of the Print Date field, select the date box, right click, and select from the available formatting options.

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 from Windows PeopleSoft Query.

Note. If you have access to the Windows version of Query Designer, 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 don't have access to Windows query can schedule a predefined Crystal Report to run on a Process Scheduler server, and the results can be routed to PeopleSoft Report Manager.

You should run reports from within PeopleSoft applications when possible, so you don't have to exit your PeopleSoft application. If you run Crystal Reports in standalone mode (not launched from PeopleSoft Query or another PeopleSoft application), you must ensure that the current working directory is set properly.

Running Crystal Reports From PeopleSoft Process Scheduler

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

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

- 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. The default name can also be tied back to information about the process that generated the output by using process instance as the key to the process request table.

Process Scheduler can export a Crystal report directly to a Lotus spreadsheet (.WKS file format). However, there is a limit of 2048 rows of data per spreadsheet export.

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.

See Also

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 8.5 for PeopleSoft, Crystal Reports for PeopleSoft, or double click the icon within the Windows program group created for Crystal Reports.

   The Welcome to Crystal Reports for PeopleSoft dialog box appears.

2. Choose *Open an Existing Report* option and select the file you want to open.

   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. Scroll to the right to see the report header elements that identify the report.

   The column headings represent fields from the query that's used to generate this report. The rows where Crystal will print actual data are represented by the field names in the Details section of the screen.

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

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

Launch Crystal Reports With PeopleSoft Query

Once you've saved and run a query, you can use Crystal Reports to format printed output. Just as you can run queries repeatedly, you can reuse the reports you create in Crystal. Default Crystal reports are generated in the following ways:

- When you create a default Crystal report from PeopleSoft Query, Query creates a default 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.

Note. Crystal uses the full query name, not the 8.3 file name format used in previous releases.

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've created in Crystal Reports every time you print the report. If you always update and print the report from within Crystal Reports, it doesn't 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. Using Windows, select Go, PeopleTools, Query.

   The PeopleSoft Query Access Group panel appears.

2. Select File, Open or click the Open button to display the Open Query dialog box.
3. Highlight the name of the query 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.

4. Click the Run to Crystal Report button to run the query.

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

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

Note. For an alternate way to run a query with Crystal output, select Go, PeopleSoft Application (Administer Workforce), View, Navigator Display, Query, and then right-click a query and click Run to Crystal.

Repeated Query Prompts

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

When queries include prompts, you will be prompted once at design time and once at run time 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 run time (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 run-time prompt issue above. Fill in the appropriate values after selecting to verify the database.

See Also

PeopleSoft Query, “Creating and Running Simple Queries”

APPENDIX A

Using PeopleTools RPT Conversion Utility

The PeopleTools RPT Conversion utility is a stand-alone 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. In this appendix we discuss how to:

- Convert RPT files.
- Repair RPT files.

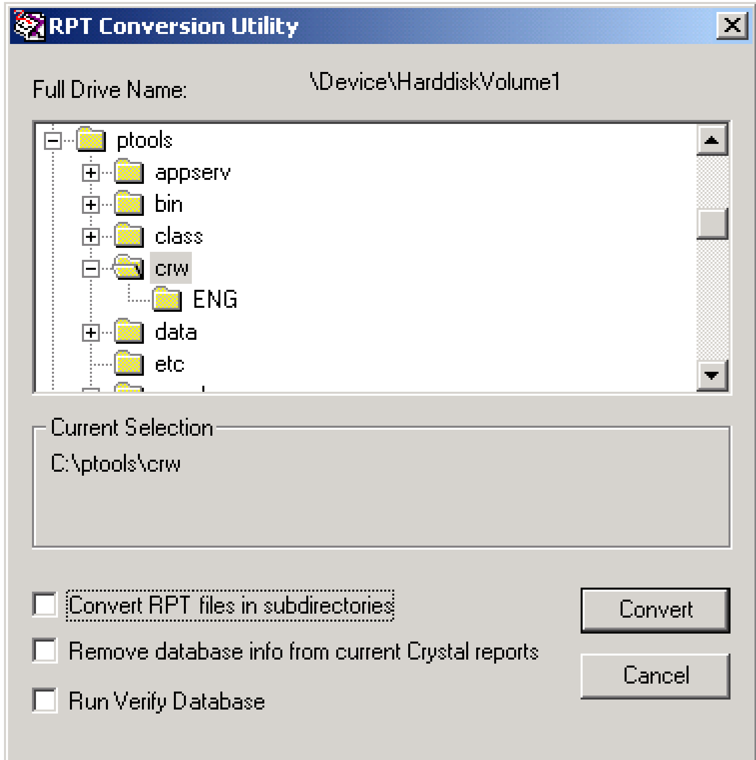
See Also

peopleSoft Upgrade Guide for Your Platform

Converting RPT Files

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

Note. We also recommend backing up your report files. If any problem occurs during the running of this program, your report files may become corrupted.



RPT Conversion Utility dialog window

To run the conversion:

1. Select Start, Programs, PeopleSoft Program Group, PeopleTools RPT Converter.

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

2. Select *Convert RPT files in the sub-directories* checkbox.

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

3. Select *Convert.*

   If you have not logged into the PeopleSoft database, you will be prompted to do so. After successfully logging into a database, a progress window will be displayed. When the conversion is complete, a Close button will be enabled.

4. 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

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

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

To repair RPT files:

- Select Start, Programs, PeopleSoft Program Group, PeopleTools RPT Converter.

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

- Select either *Run Verify Database* checkbox, or *Remove database info from current Crystal reports* checkbox.

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

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

- Select *Convert.*

  A progress window will be displayed. When complete, a Close button will be enabled.

- 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.

account — You use an account code to record and summarize financial transactions as expenditures, revenues, assets, or liabilities balances. The use of this delivered PeopleSoft ChartField is typically defined when you implement PeopleSoft General Ledger.

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 entry — A set of related debits and credits. An accounting entry is made up of multiple accounting lines. In most PeopleSoft applications, accounting entries are always balanced (debits equal credits). Accounting entries are created to record accruals, payments, payment cancellations, manual closures, project activities in the general ledger, and so forth, depending on the application.

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 anotherand 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.

activity — In PeopleSoft Enterprise Learning Management, an instance of a catalog item delivery methodit may also be called a class. The activity defines such things as meeting times and locations, instructors, reserved equipment and materials, and detailed costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

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.

application agent — An application agent is an online agent that is loaded into memory with a PeopleSoft page. It detects when a business rule has been triggered and determines the appropriate action.

asset class — An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attachment — In PeopleSoft Enterprise Learning Management, nonsystem-defined electronic material that supplements a learning resource, such as an equipment items user handbook or the site map of a large facility.

background process — In PeopleSoft, background processes are executed through process-specific COBOL programs and run outside the Windows environment.

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.

branch — A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only — An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called system-maintained account.

budget check — In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control — In commitment control, budget control ensures that commitments and expenditures don’t exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document’s cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period — The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event — In PeopleSoft 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).

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.

category — In PeopleSoft Enterprise Learning Management, a way to classify catalog items so that users can easily browse and search relevant entries in the learning catalog. Categories can be hierarchical.

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.

child — In PeopleSoft Tree Manager trees, a child is a node or detail on a tree linked to another, higher-level node (referred to as the parent). Child nodes can be rolled up into the parent. A node can be a child and a parent at the same time depending on its location within the tree.

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.*

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.

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.

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.

configuration parameter catalog — Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan — In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference — Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context — In 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.

corporate account — Equivalent to the Account ChartField. Distinguishes between the chart of accounts typically used to record and report financial information for management, stockholders, and the general public, as opposed to a chart of statutory (alternate) accounts required by a regulatory authority for recording and reporting financial information.

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.

data acquisition
In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements
Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

data row
Contains the entries for each field in a table. To identify each data row uniquely, PeopleSoft applications use a key consisting of one or more fields in the table.

data validation
In PeopleSoft Enterprise Incentive Management, a process of validating and cleansing the feed data to resolve conflicts and make the data processable.

DAT file
This text file, used with the Verity search engine, contains all of the information from documents that are searchable but not returned in the results list.

delivery method
In PeopleSoft Enterprise Learning Management, identifies a learning activitys delivery method type. An activity can have one or more delivery methods.

delivery method type
In PeopleSoft Enterprise Learning Management, specifies a method that your organization uses to deliver learning activities, for example, scheduled or self-paced learning.

distribution
The process of assigning values to ChartFields. A distribution is a string of ChartField values assigned to items, payments, and budget amounts.

double byte character
If youre working with Japanese or other Asian employees, you can enter the employee’s name using double-byte characters. The standard double byte character set name format in PeopleSoft applications is: [last name] space [first name].

dynamic tree
A tree that takes its detail valuesdynamic detailsdirectly from a table in the database, rather than from a range of values 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 job
Abbreviation for *Enterprise Incentive Management job.* In PeopleSoft Enterprise Incentive Management, a collection of job steps that corresponds to the steps in an organizations compensation-related business process. An EIM job can be stopped to allow manual changes or corrections to be applied between steps, and then resumed from where it left off, continuing with the next step. A run can also be restarted or rolled back.

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.

equipment
In PeopleSoft Enterprise Learning Management, resource items that can be assigned to a training facility, to a specific training room, or directly to an activity session. Equipment items are generally items that are used (sometimes for a fee) and returned after the activity is complete.

event — Events are predefined points either in the application processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program associated with that component and that event. Examples of events are FieldChange, SavePreChange, and OnRouteSubscription. In PeopleSoft Human Resources, *event* also refers to incidents that affect 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.

external system — In PeopleSoft, any system that is not directly compiled with PeopleTools servers.

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.

filter — In PeopleSoft applications, a filter creates a subset of information. Filters are used in templates to limit your information from a pick list of attribute values.

generic process type — In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

group — Any set of records associated under a single name or variable in order to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

homepage — Users can personalize the homepage, or the page that first appears when they access the portal.

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.

key — 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.

learner group — In PeopleSoft Enterprise Learning Management, a group of learners within the same learning environment that share the same attributes, such as department or job code.

learning activity — See *activity.*

learning history — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities.

learning plan — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned and in-progress learning activities.

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.

level A section of a tree that organizes groups of nodes.

library section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load The feature that initiates a process to automatically load information into a PeopleSoft applicationfor example, populating the PeopleSoft Benefits database with plan-level election information.

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 addressesfor 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 locationindicated by a *1*is the address you use most often and may be different from the main address.

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.

material In PeopleSoft Enterprise Learning Management, a resource item that can be assigned to the sessions of an activity. Material items are generally consumed during the duration of an activity and not returned, and they may have an associated cost.

message definition An object definition specified in PeopleSoft Application Designer that contains message information for PeopleSoft Application Messaging.

meta-SQL Meta-SQL constructs expand into platform-specific 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 Processes in PeopleSoft applications that can create both application entries and general ledgers denominated in more than one currency.

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

objective In PeopleSoft Enterprise Learning Management, an individual's learning goal. An example of a learning goal is a competency gap.

override In PeopleSoft Enterprise Incentive Management, the ability to make a change to a plan that applies to only one plan context.

pagelet Each block of content on the homepage 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.

parent node A tree node linked to lower-level nodes or details that roll up into it. A node can be a parent and a child at the same time, depending on its location within the tree.

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 *participant object.*

payout In PeopleSoft Enterprise Incentive Management, the resulting incentive plan computation that is provided to payroll.

PeopleCode PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of an 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.

per seat cost In PeopleSoft Enterprise Learning Management, the cost per learner, based on the total activity costs divided by either minimum attendees or maximum attendees. Organizations use this cost to price PeopleSoft Enterprise Learning Management activities.

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 contextif 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 section In PeopleSoft Enterprise Incentive Management, a segment of a plan that handles a specific type of event processing.

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.

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.

private view A user-defined view that is available only to the user who created it.

process See *Batch Processes.*

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 an SQR, a COBOL program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record definition A logical grouping of data elements.

record field A field within a record definition.

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.*

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.

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.

results management process In PeopleSoft Sales Incentive Management, the process during which compensation administrators may review processing results, manually change transactions, process draws, update and review payouts, process approvals, and accumulate and push payments to the EIM ledger.

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.

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.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

routing Connects activities in PeopleSoft Workflow. Routings specify where the information goes and what form it takesemail message, electronic form, or worklist entry.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

self-service application Self-service refers to PeopleSoft applications that are accessed by end users with a browser.

session In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise

Learning Management activitycharacteristics 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.

sibling — A tree node at the same level as another node, where both roll up into the same parent. A node can be a sibling, parent, and child all at the same time, depending on its location in the tree.

single signon — With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction — In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart — A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType — A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

SQR — See *Structured Query Report (SQR).*

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.

Structured Query Report (SQR) — A type of printed or displayed report generated from data extracted from a PeopleSoft SQL-based relational database. PeopleSoft applications provide a variety of standard SQRs that summarize table information and data. You can use these reports as is, customize them, or create your own.

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 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.

table The underlying PeopleSoft data format, in which data is stored by columns (fields) and rows (records, or instances).

TableSet sharing Specifies control table data for each business unit so that redundancy is eliminated.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template A template is HTML code associated with a Web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

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 loading process In PeopleSoft Enterprise Incentive Management, the process during which transactions are loaded into Sales Incentive Management. During loading, the source currency is converted to the business unit currency while retaining the source currency code. At the completion of this stage, the transaction is in the first state.

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.

transaction type In PeopleSoft Enterprise Incentive Management, a way to categorize transactions to identify specific transaction types (for example, shipment, order, opportunity, and so on). Plan sections process only one type of transaction type. Transaction types can be defined based on a company's specific processes model.

Translate table A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

uniform resource locator (URL) In PeopleSoft, the term URL refers to the entire query string. The following is an example of a URL: http://serverx/InternetClient/InternetClientServlet?ICType=Script&ICScriptProgramName=WEBLIB_BEN_401k.PAGES.FieldFormula.iScript_Home401k

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.

URL See *uniform resource locator (URL).*

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.

warehouse A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

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.

workflow The background process that creates a list of administrative actions based on selection criteria and specifies the procedure associated with each action.

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.

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.

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