



EnterpriseOne Tools 8.94
PeopleBook: Crystal Reporting
Solutions for PeopleSoft
EnterpriseOne

November 2004

EnterpriseOne Tools 8.94 PeopleBook: Crystal Reporting Solutions for PeopleSoft EnterpriseOne
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Contents

General Preface

About This PeopleBookvii

PeopleSoft Application Prerequisites.....vii

PeopleSoft Application Fundamentals.....vii

Documentation Updates and Printed Documentation.....viii

 Obtaining Documentation Updates.....viii

 Ordering Printed Documentation.....viii

Additional Resources.....ix

Typographical Conventions and Visual Cues.....x

 Typographical Conventions.....x

 Visual Cues.....xi

 Country, Region, and Industry Identifiers.....xi

 Currency Codes.....xii

Comments and Suggestions.....xii

Common Elements Used in PeopleBooks.....xii

Preface

Crystal Reporting Solutions for PeopleSoft EnterpriseOne.....xv

PeopleSoft Products.....xv

Crystal Reporting Solutions for PeopleSoft EnterpriseOne.....xv

Additional Resources.....xv

Part 1

Crystal Reporting Solutions for PeopleSoft

Chapter 1

Getting Started with Crystal Reporting Solutions for PeopleSoft EnterpriseOne.....3

PeopleSoft PeopleTools Crystal Reporting Solutions for PeopleSoft EnterpriseOne Overview.....3

Implementing Crystal Reporting Solutions for PeopleSoft.....3

Chapter 2

Understanding the Crystal Reporting Solution for PeopleSoft.....5

Crystal Reporting Solution for PeopleSoft.....5

Key Concepts.....5

 Data Adapter.....5

 Security Plugin.....5

 Domain.....6

 Role.....6

Integrations.....6

Part 2

Crystal Reports for PeopleSoft

Chapter 3

Understanding Crystal Reports for PeopleSoft.....11

Crystal Reports for PeopleSoft.....11

Chapter 4

Creating a Link from EnterpriseOne Solution Explorer to Crystal Reports for PeopleSoft.....13

Understanding Links from Solution Explorer to Crystal Reports for PeopleSoft.....13

Prerequisite.....13

Chapter 5

Selecting Data Sources.....15

Understanding Data Sources.....15

Connecting to EnterpriseOne Data Sources.....15

 Forms Used to Connect to EnterpriseOne Data Sources.....16

 Connecting to a Data Source.....16

Working with Data Sources.....17

 Forms Used to Work with Data Source Options.....17

 Determining Data Source Options.....17

Chapter 6

Accessing Data.....	21
Understanding Data.....	21
Changing Data Sources for a Generated Report.....	22
Forms Used to Change Data Sources for a Generated Report.....	22
Changing the Data Source.....	22

Chapter 7

Saving Reports to and Opening Reports from Crystal Enterprise.....	25
Understanding Saving.....	25
Understanding Opening.....	25
Logging On to Crystal Enterprise.....	25
Forms Used to Log On to Crystal Enterprise.....	26
Logging On to Crystal Enterprise to Save or Load a Report.....	26

Part 3

Crystal Enterprise for PeopleSoft

Chapter 8

Understanding Crystal Enterprise for PeopleSoft.....	29
Crystal Enterprise for PeopleSoft Users.....	29
Crystal Enterprise for PeopleSoft Integrations.....	29

Chapter 9

Creating a Link from EnterpriseOne Menu to Crystal Enterprise for PeopleSoft.....	31
Understanding Links from EnterpriseOne Menu to Crystal Enterprise for PeopleSoft.....	31
Prerequisite.....	31

Chapter 10

Administering Crystal Enterprise for PeopleSoft.....	33
Understanding the CMC.....	33
Logging on to the CMC.....	33
Forms Used to Log on to the CMC.....	34
Logging on to the CMC.....	34
Administering Reports.....	35

Forms Used to Administer Reports.....35

Administering EnterpriseOne Settings for Reports.....35

Administering PeopleSoft EnterpriseOne Authentication.....36

Forms Used to Administer PeopleSoft EnterpriseOne Authentication.....37

Using PeopleSoft EnterpriseOne Authentication.....37

Chapter 11

Using Crystal Enterprise for PeopleSoft.....41

Understanding Crystal Enterprise Functions.....41

Understanding Guest Accounts.....42

Logging on to Crystal Enterprise.....43

Forms Used to Log on to Crystal Enterprise.....43

Logging on to Crystal Enterprise.....43

Scheduling a Report.....44

Scheduling Reports.....44

Logging on to the Data Adapter.....45

Viewing Report Data Using the Database Logon.....45

Glossary of PeopleSoft Terms.....47

Index67

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. 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 peoplesoftpress@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
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
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.
<i>Italics</i>	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

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.

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

Address Book Number

Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant id, participant number, and so on.

As If Currency Code	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code allows you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
Batch Number	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
Batch Date	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
Batch Status	<p>Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:</p> <p><i>Blank:</i> Batch is unposted and pending approval.</p> <p><i>A:</i> The batch is approved for posting, has no errors and is in balance, but it has not yet been posted.</p> <p><i>D:</i> The batch posted successfully.</p> <p><i>E:</i> The batch is in error. You must correct the batch before it can post.</p> <p><i>P:</i> The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to E.</p> <p><i>U:</i> The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.</p>
Branch/Plant	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
Business Unit	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
Category Code	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
Company	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
Currency Code	Enter the three-character code that represents the currency of the transaction. PeopleSoft EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
Document Company	<p>Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.</p> <p>If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.</p>

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. PeopleSoft EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and Fiscal Year

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010)

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

Crystal Reporting Solutions for PeopleSoft EnterpriseOne Preface

This book discusses Crystal reporting tools for PeopleSoft, including Crystal Reports for PeopleSoft, and Crystal Enterprise for PeopleSoft. Since Crystal reporting tools are documented in Crystal guides that are delivered with the product, only exceptions to standard Crystal functionality are presented.

PeopleSoft Products

This PeopleBook refers to this PeopleSoft product line: PeopleSoft EnterpriseOne Tools.

Crystal Reporting Solutions for PeopleSoft EnterpriseOne

This PeopleBook covers Crystal Reporting Solutions for PeopleSoft EnterpriseOne, a member of the EnterpriseOne Tools suite. Crystal Reporting Solutions for PeopleSoft EnterpriseOne helps you generate, view, and schedule clear and easy-to-read printed reports containing data from your PeopleSoft EnterpriseOne product.

Additional Resources

These resources are located on the PeopleSoft Customer Connection website:

Resource	Navigation
EnterpriseOne Tools 8.94 PeopleBook: Foundation	Support, Documentation, Documentation Updates, Release, 8.94, EnterpriseOne, EnterpriseOne Tools

PART 1

Crystal Reporting Solutions for PeopleSoft

Chapter 1

Getting Started with Crystal Reporting Solutions for PeopleSoft EnterpriseOne

Chapter 2

Understanding the Crystal Reporting Solution for PeopleSoft

CHAPTER 1

Getting Started with Crystal Reporting Solutions for PeopleSoft EnterpriseOne

This chapter provides an overview of preparing to use Crystal Reporting Solutions for PeopleSoft.

PeopleSoft PeopleTools Crystal Reporting Solutions for PeopleSoft EnterpriseOne Overview

Crystal Reporting Solutions for PeopleSoft EnterpriseOne consists of three applications: Crystal Reports for PeopleSoft, Crystal Enterprise for PeopleSoft, and Crystal Enterprise Live Office. Use Crystal Reports for PeopleSoft to design and create reports using EnterpriseOne data. Use Crystal Enterprise for PeopleSoft to share, administer, view, and schedule those reports. Use Crystal Enterprise Live Office to embed reports from Crystal Enterprise in Microsoft Word, Excel, or PowerPoint.

This guide is an addendum to, not a replacement of, the guides that come with Crystal Reports and Crystal Enterprise. For a complete understanding of those programs, please refer to the appropriate Crystal guides.

Implementing Crystal Reporting Solutions for PeopleSoft

To use these applications you must first:

- Install PeopleSoft EnterpriseOne version 8.9, 8.10, or 8.11.
- Install PeopleSoft EnterpriseOne Tools version 8.94.
- Install Crystal Enterprise 10 for PeopleSoft
- Install Crystal Enterprise 10 for PeopleSoft — Integration
- Install Crystal Reports 10 for PeopleSoft.
- Install Crystal Reports 10 — Integration.
- Install Crystal Enterprise Live Office.

CHAPTER 2

Understanding the Crystal Reporting Solution for PeopleSoft

This chapter provides overviews of key concepts used throughout this manual, and integrations.

Crystal Reporting Solution for PeopleSoft

PeopleSoft has partnered with Business Objects to provide a robust suite of reporting tools to be used with PeopleSoft products. This suite of tools consists of Crystal Reports for PeopleSoft (Crystal Reports), a Windows-based tool for designing and maintaining reports, Crystal Enterprise for PeopleSoft (Crystal Enterprise), a web-based tool that allows users to view and schedule reports and allows administrators to control access to reports, and Crystal Enterprise Live Office, a Microsoft Office add-in that allows dynamic reporting content to be added to Microsoft Word, Excel, and PowerPoint.

Key Concepts

This section describes certain key concepts needed to understand the interactions between Crystal Reports, Crystal Enterprise, and EnterpriseOne. They include:

- Data Adapter
- Security Plugin
- Domain
- Role

Data Adapter

The PeopleSoft EnterpriseOne data adapter enables the Crystal products to view EnterpriseOne as a data source for use by reports. When a user creates, views, or schedules a report, the data adapter interacts with EnterpriseOne middleware (JDB) to retrieve the data for the report. The data adapter requires a logon to EnterpriseOne, recognizing the existing column and row security defined in EnterpriseOne.

Security Plugin

The PeopleSoft EnterpriseOne security plugin enables Crystal Enterprise to view EnterpriseOne as a security server. It enables Crystal Enterprise to authenticate its users against EnterpriseOne. The security plugin requires a logon to EnterpriseOne and provides a new authentication type in Crystal Enterprise for EnterpriseOne. This is a different logon than used for the data adapter.

Domain

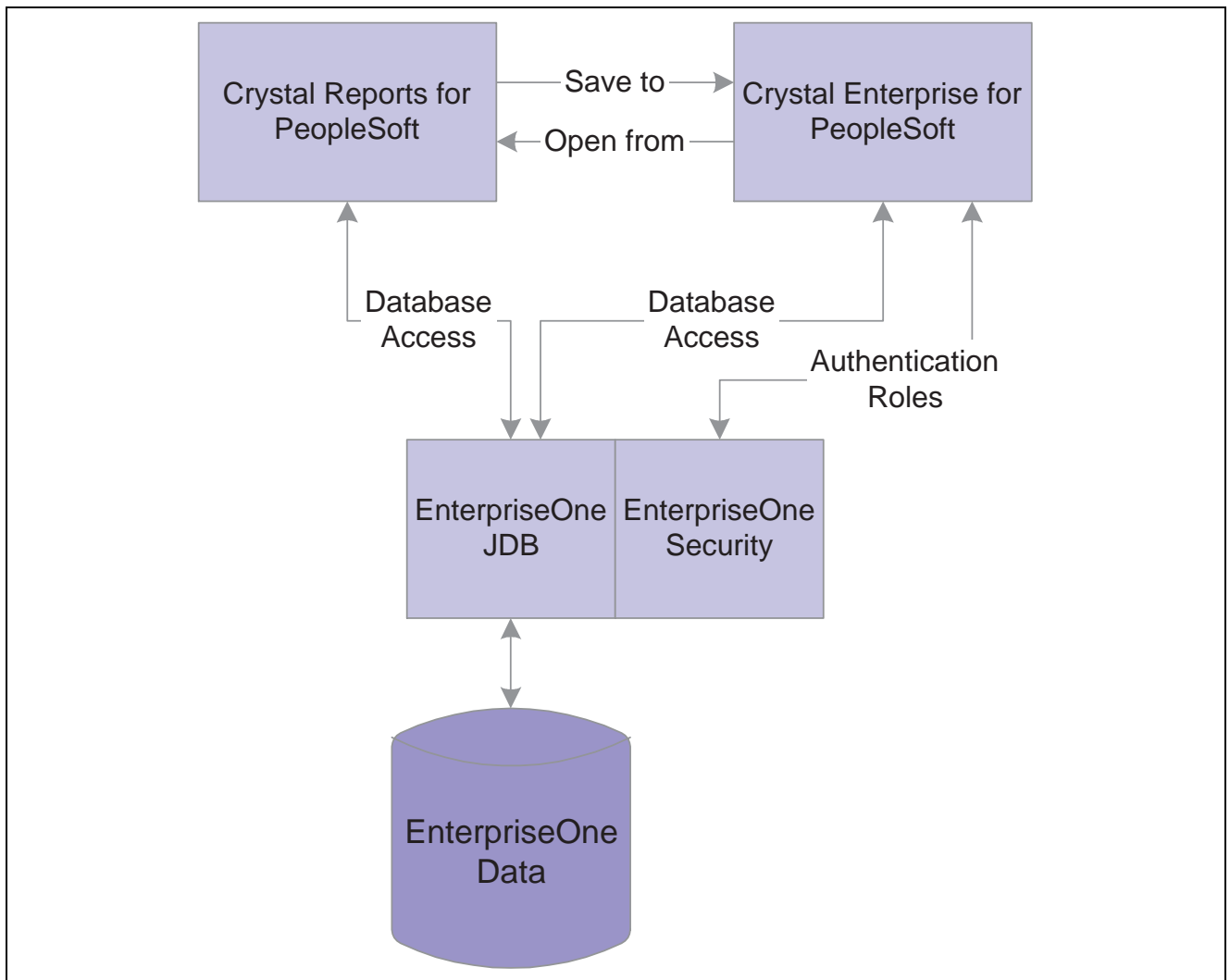
Domain is a term specific to Crystal Enterprise for PeopleSoft. It is an encapsulation of EnterpriseOne server, port, and environment. Crystal Enterprise uses domains to authenticate EnterpriseOne users against EnterpriseOne security and to allow Crystal Enterprise security to be defined using EnterpriseOne roles. Roles within a domain are mapped to Crystal Enterprise. Only the domains and roles that are mapped are allowed access to Crystal Enterprise through PeopleSoft EnterpriseOne authentication.

Role

A role is a named group of users with the same security settings. You define roles for each domain. Roles indicate which EnterpriseOne users can log on to Crystal Enterprise for PeopleSoft. An administrator sets security on these roles using the Crystal Management Console. A user logging on has the sum of the rights of their roles, as defined in Crystal Enterprise.

Integrations

Crystal Reports integrates with the PeopleSoft EnterpriseOne middleware (JDB). Crystal Reports for PeopleSoft draws data from the EnterpriseOne JDB using a data adapter. Using Crystal Enterprise for PeopleSoft, Crystal Reports for PeopleSoft can securely open and save reports.



The Crystal Reporting Solution for PeopleSoft.

Crystal Enterprise for PeopleSoft interacts with PeopleSoft EnterpriseOne Security Server using a security plugin. This integration ensures that only authorized users gain access to reports and the sensitive data within those reports.

Crystal Enterprise for PeopleSoft also interacts with the EnterpriseOne JDB to return data when you view or schedule a report. This interaction is controlled by the data adapter.

PART 2

Crystal Reports for PeopleSoft

Chapter 3

Understanding Crystal Reports for PeopleSoft

Chapter 4

Creating a Link from EnterpriseOne Solution Explorer to Crystal Reports for PeopleSoft

Chapter 5

Selecting Data Sources

Chapter 6

Accessing Data

Chapter 7

Saving Reports to and Opening Reports from Crystal Enterprise

CHAPTER 3

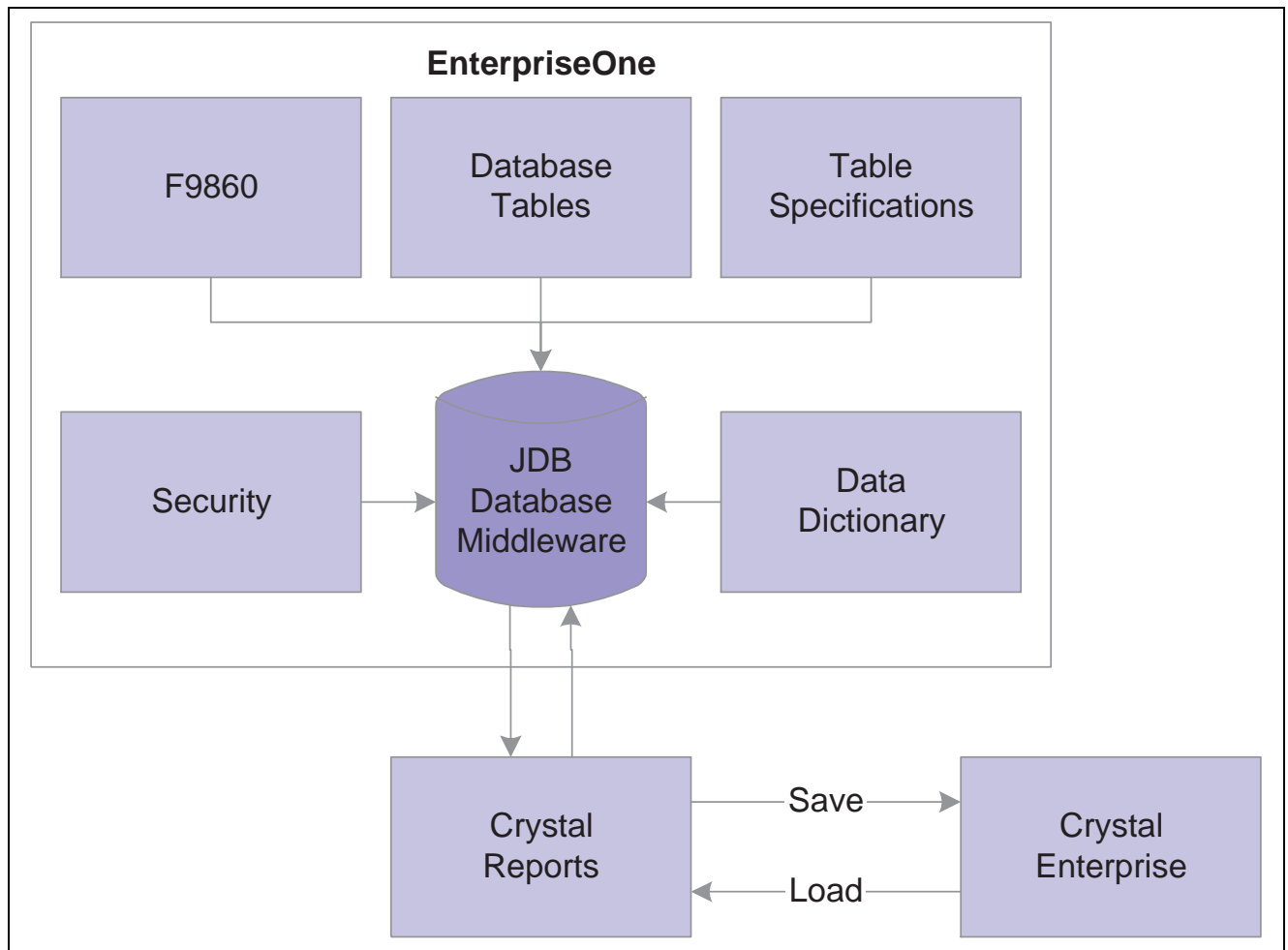
Understanding Crystal Reports for PeopleSoft

This chapter provides an overview of Crystal Reports for PeopleSoft.

Crystal Reports for PeopleSoft

Crystal Reports for PeopleSoft is a tool for creating reports using PeopleSoft EnterpriseOne data. To get to the data in EnterpriseOne, Crystal Reports for PeopleSoft uses a data adapter that enables it to communicate with the EnterpriseOne middleware, known as JDB. JDB in turn gets data from the appropriate sources within EnterpriseOne, including the F9860 table, database tables, table specifications, security, and data dictionary.

In Crystal Reports for PeopleSoft, you have the option of saving reports to Crystal Enterprise for PeopleSoft. This allows users who do not have access to Crystal Reports for PeopleSoft to view and run reports from the Web.



Integrations between Crystal Reports for PeopleSoft, PeopleSoft EnterpriseOne, and Crystal Enterprise for PeopleSoft.

CHAPTER 4

Creating a Link from EnterpriseOne Solution Explorer to Crystal Reports for PeopleSoft

This chapter provides an overview of how to create your own link from Solution Explorer to Crystal Reports for PeopleSoft.

Understanding Links from Solution Explorer to Crystal Reports for PeopleSoft

You can access Crystal Reports independently from the Windows Start menu. You can also create a link to Crystal Reports for PeopleSoft from Solution Explorer, giving you the ability to exit from EnterpriseOne to Crystal Reports for PeopleSoft.

When creating the link from Solution Explorer to the task, use the values from this table:

Field	Value
Task Name	<i>Crystal Reports for PeopleSoft</i>
Product Code	<i>55 through 59</i>
Task Type	<i>URL</i>
URL	<i>C:\Program Files\Crystal Decisions\Crystal Reports 10\crw32.exe</i> for standard installations

See Also

EnterpriseOne Tools 8.94 PeopleBook: Solution Explorer, “Using the Menu Design Mode,” Creating a Task

Prerequisite

To create a link to Crystal Reports for PeopleSoft from Solution Explorer you must have permissions to add menu items in Solution Explorer. If you do not have permissions, contact your system administrator.

CHAPTER 5

Selecting Data Sources

This chapter provides an overview of data sources, and discusses how to:

- Connect to a data source.
- Work with data source options.

Understanding Data Sources

When you create a report, you use the Data Expert to select the data source for the report. If you select an EnterpriseOne data source, a Connection form displays through which you can log on to EnterpriseOne using the data adapter.

Once you log on to EnterpriseOne, Crystal Reports for PeopleSoft accesses the F9860 (Object Librarian Master) table, which stores information about tables and business views. Crystal Reports for PeopleSoft retrieves information from F9860 and displays the tables and business views on the Data Expert.

Note. While you can select to report from multiple tables and business views in a single report using the Data Expert, it is not recommended. Ad hoc joining of tables and business views within a report results in suboptimal performance of the report. We recommend that you create a new business view in EnterpriseOne if you need data from multiple tables or business views. The business view defines the table joins. Another alternative is to use a native database view that joins multiple tables. After you have created the native database view, you can expose it as an EnterpriseOne table, which you can use in Crystal Reports.

If you look under the Create New Connection folder of the Data Expert and you do not see the PeopleSoft EnterpriseOne data source, you need to install Crystal Reports-Integration from the EnterpriseOne Install Manager.

Using the Data Expert you can also use the right-click menu to set a data source as a favorite, rename a data source, view its properties, or view options. Options are global settings that affect all data sources. For example, if you set a filter within the data source options, that filter applies to all instances of that data source.

Connecting to EnterpriseOne Data Sources

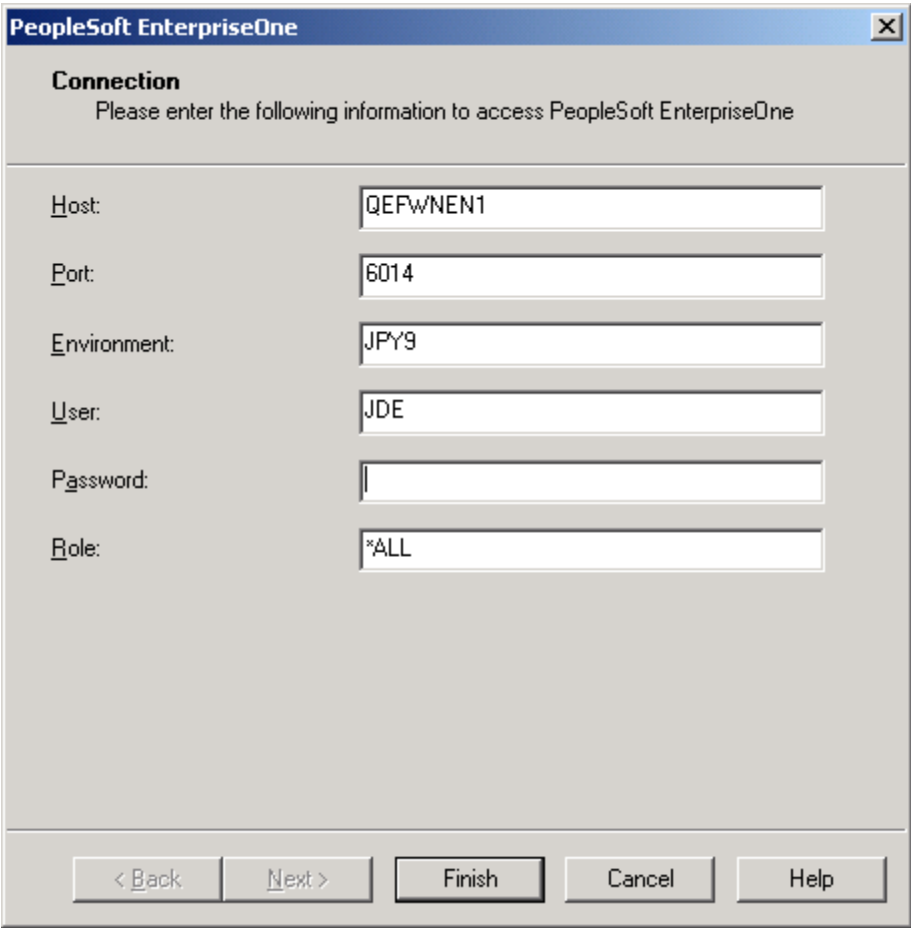
This section discusses how to connect to an EnterpriseOne data source.

Forms Used to Connect to EnterpriseOne Data Sources

Form Name	Form ID	Navigation	Usage
Connection	Not Applicable (NA)	From the Data Expert, select Create New Connection, then PeopleSoft EnterpriseOne.	Specify the data source and log on information.

Connecting to a Data Source

Access the Connection dialog.



The data source Connection dialog

- Host**

Enter the PeopleSoft EnterpriseOne server, or the security server, if you have one.
- Port**

Enter the number identifying the port through which to connect to the EnterpriseOne server.
- Environment**

Enter the environment you are logging into; for example: *PD*, *DV*, or *PS*.
- User**

Enter your EnterpriseOne user ID.
- Password**

Enter the password for your user ID.

Role Enter your role. If blank, role defaults to **ALL*.

Working with Data Sources

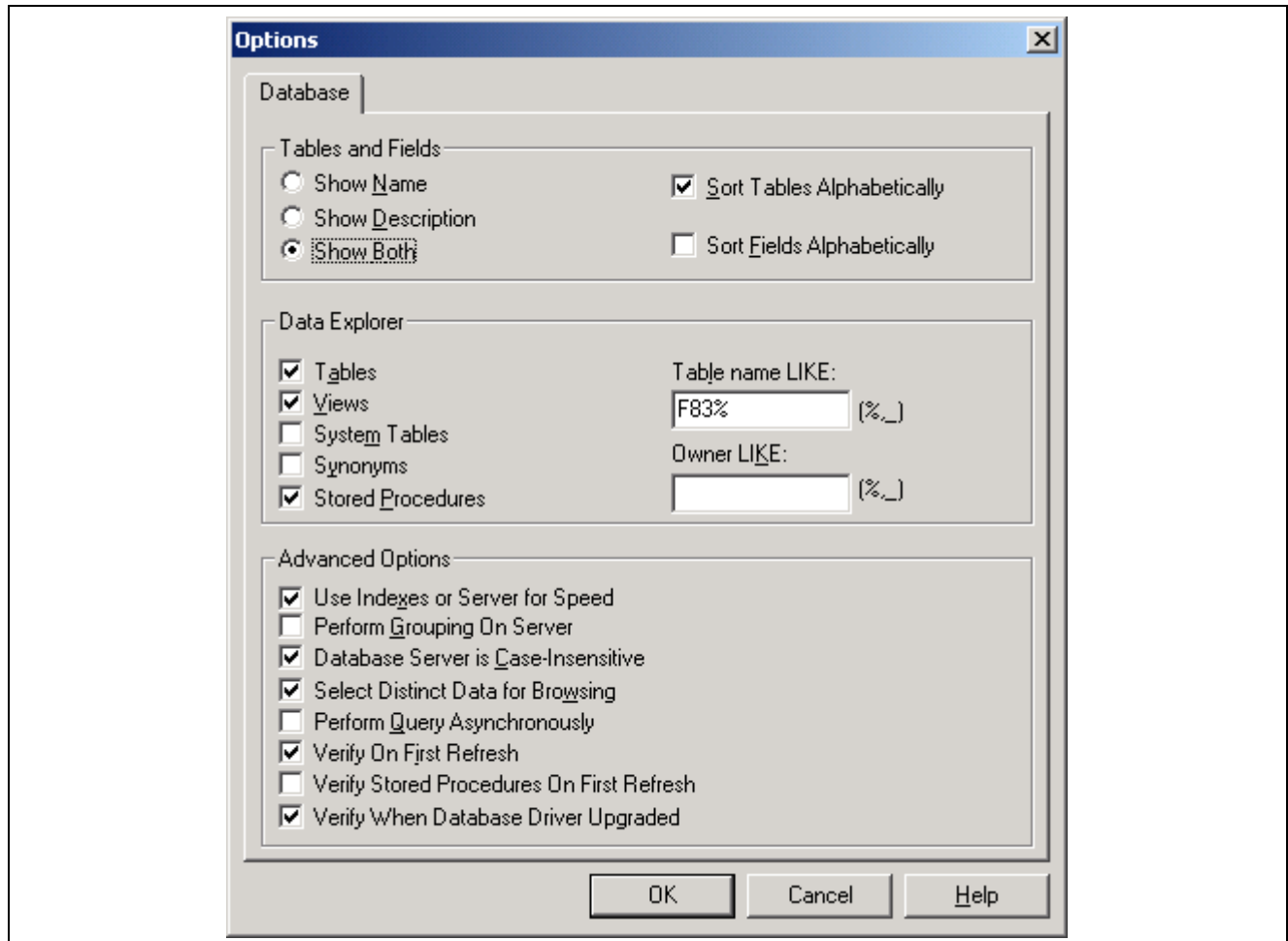
This section discusses how to determine data source options.

Forms Used to Work with Data Source Options

Form Name	Form ID	Navigation	Usage
Options	NA	Right click a data source on the Data Expert and select Options.	Determine how the tables and business views in the data source display, which tables and business views display, and advanced options.

Determining Data Source Options

Access the Options dialog.



The data source Options dialog.

Show Name	Select to show only the table or business view name, not the description.
Show Description	Select to show only the table or business view description, not the name.
Show Both	Select to show both the table or business view name and description. This is the recommended setting.
Sort Tables Alphabetically	Select to display tables and business views sorted in ascending alphanumeric order by name. This is the recommended setting.
Sort Fields Alphabetically	Select this option to display fields in tables and business views sorted in ascending alphanumeric order by name. This is not a recommended setting, because fields in PeopleSoft EnterpriseOne tables and business views are sorted by importance.
Tables	Select to display available tables from the data source. This is the recommended setting.
Views	Select to display available business views from the data source. This is the recommended setting.
System Tables	Select to report on system tables. This setting has no effect when reporting from an EnterpriseOne data source.

Synonyms	Select to enable reporting on virtual tables that are available on some hosts. This option is not selected by default. This setting has no effect when reporting off an EnterpriseOne data source.
Stored Procedures	Select to enable reporting on the result sets from stored procedures if you are using SQL systems that support stored procedures. This option is selected by default. This setting has no effect when reporting from an EnterpriseOne data source.
Table Name LIKE	Enter the first part of a table name with wild cards. This field provides a filter for tables or business views. We recommend you use this filter to narrow the number of tables and business views retrieved from F9860 and to increase speed.
Owner LIKE	Enter an owner name with wild cards to filter tables and business views based on their owner or creator. This is not a recommended option.
Use Indexes or Server for Speed	Select to enable Crystal Reports to use the available indexes or servers to speed the record selection process. If this check box is cleared, the record section process may be much slower. This option is selected by default. This setting has no effect when reporting from an EnterpriseOne data source.
Perform Grouping on Server	Select to enable the program to perform grouping on the server (server-side processing). Server-side processing allows you to set up a report that performs the majority of its processing on the server and pushes only relevant details to your computer. This option is not selected by default. This setting has no effect when reporting from an EnterpriseOne data source.
Database Server is Case-Insensitive	Select to enable you to search for strings in your SQL data without checking the case. For example, if your report contains SQL data and the data is of mixed case (red, RED, Red), a case-sensitive search for "red" returns only "red." If you select this check box, the same query will return all variations of red, such as red, RED, and Red . This option is selected by default.
Select Distinct Data for Browsing	Select to enable you to see the first 500 distinct (unique) records when you browse the contents of a database field. When Select Distinct Data for Browsing is not selected, browsing returns the unique values in the first 500 records. This option is selected by default.
Perform Query Asynchronously	Select this option to allow Crystal Reports to execute the SQL statement asynchronously, which means that instead of waiting for the SQL statement to finish executing, the program checks intermittently to see if the user wants to cancel the process. Retrieving data from the database server can be divided into two parts: executing the SQL statement and fetching the rowset from the database server. This option is not selected by default.
Verify On First Refresh	Select this option to refresh the report with the current version of the active database (unless it is a stored procedure) and resets its record buffers to the current record size the first time you refresh it per session. This option is selected by default.
Verify Stored Procedures On First Refresh	Select this option to refresh the report with the current version of the stored procedure and resets its record buffers to the current record size the first time you refresh it per session. This option is not selected by default.

Verify When Database Driver Updated

Select this option to refresh the report with the current version of the active database and resets its record buffers to the current record size when the database driver is changed. This option is selected by default.

CHAPTER 6

Accessing Data

This chapter provides an overview of data as it relates to Crystal Reports for PeopleSoft and discusses how to change data sources for a generated report.

Understanding Data

After you have selected a table or business view, you can view and select fields contained within using either the Fields dialog box of the Wizard or the Fields tab of the Field Explorer. If you have set your options to view both the field name and description, the field name displays next to the description of the field as defined in the EnterpriseOne data dictionary. If you have not selected to view both, either the field name or its data dictionary description appear.

Every field name is a multi-character string. The first two characters of the name indicate in which table the field resides. Some field names are identical to the previous field names, but include a suffix, “_DESC”. This indicates that the field was automatically generated and contains the User Defined Code (UDC) descriptions of the previous field, which contains UDCs. For example, if the ABLANG field contains the UDCs for languages (C, F, I, and so on), the ABLANG_DESC field contains the descriptions of those UDCs (Chinese, French, Italian, and so on).

Even though a business view in EnterpriseOne may contain media objects and other Binary Large Objects (BLOBs), these types of fields will not be visible in Crystal Reports.

Data types in the EnterpriseOne database are mapped to specific data types within Crystal Reports. They are displayed using the default format of that data type. When Crystal Reports retrieves data from EnterpriseOne, the data is displayed in Crystal Report’s default format for that data type. DateTime, Time, Number, and Currency fields are treated as numbers in Crystal Reports and are automatically displayed with two digits following the decimal (0.00). You may need to reformat this data within Crystal Reports after you add fields to your report.

Because the table, business view, and field information is derived from table specifications, it is possible to select a table and fields that do not actually exist in the database. They have specifications, but have never been generated. Should this happen, you will receive the message “Failed to open a rowset — no data in table.”, when you try to generate the report.

Also, because you are retrieving the data for the report from EnterpriseOne, column security, row security, and business unit security, by user or by role, may be attached to the data you are trying to access. If you have placed fields on the report that you do not have permissions to view, the field values will appear blank on the report.

Changing Data Sources for a Generated Report

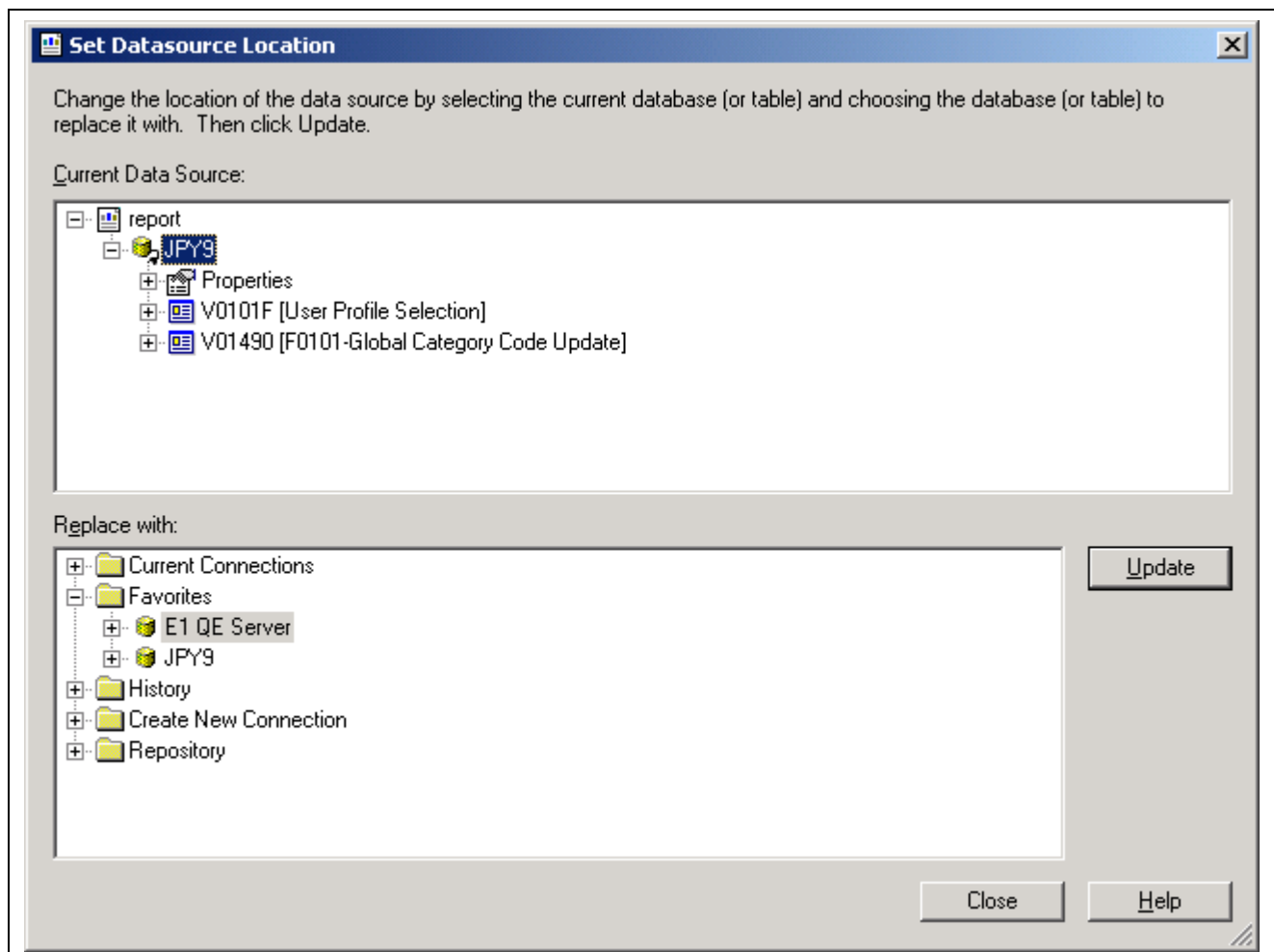
After you have generated a report, you can change the data source for that report. Select Set Datasource Location from the Database menu.

Forms Used to Change Data Sources for a Generated Report

Form Name	Form ID	Navigation	Usage
Set Datasource Location	NA	From the Database menu, select Set Datasource Location	Change the data source for a generated report.

Changing the Data Source

Access the Set Datasource Location dialog.



The Set Datasource Location dialog.

1. In the Current Data Source field, select the data source Crystal is currently using.
2. In the Replace With field, select the data source you want Crystal to use.

3. Click the Update button.
4. Click the Close button.

CHAPTER 7

Saving Reports to and Opening Reports from Crystal Enterprise

This chapter provides overviews of saving and opening reports and discusses how to log on to Crystal Enterprise to save or open a report.

Understanding Saving

When you select **Save As** from the **File** menu of Crystal Reports for PeopleSoft, you can save your report to Crystal Enterprise by selecting the **Enterprise** folder on the side bar of the **Save As** dialog. When you do so, the **Log On to Crystal Enterprise** dialog displays. Use this dialog to log on to Crystal Enterprise. You have the option to select **PeopleSoft EnterpriseOne** as your authentication type. When you use **PeopleSoft EnterpriseOne** authentication, you can log on using your **EnterpriseOne** user ID and password, as long as the Crystal Enterprise administrator has set up security for one of your roles. After you log on, you can browse through Crystal Enterprise folders to select the location where the report should be stored.

Understanding Opening

You can open an existing report from Crystal Enterprise. To open a report, select **Open** from the **File** menu. The **Open** dialog appears. You can open a report from Crystal Enterprise by selecting the **Enterprise** folder on the side bar of the **Open** form. When you do so, the **Log On to Crystal Enterprise** dialog displays. Use this form the same way as used for saving. After you log on, a file structure appears from which you can select a report, if you have the appropriate permissions. You do not automatically have permissions to open all the reports displayed in the file structure.

Logging On to Crystal Enterprise

This section discusses how to log onto Crystal Enterprise when saving a report in Crystal Reports.

Forms Used to Log On to Crystal Enterprise

Form Name	Form ID	Navigation	Usage
Log On to Crystal Enterprise	NA	After creating a report, select Save As from the File menu. Select the Enterprise folder in the side bar of the Save As form.	Log on to Crystal Enterprise and specify the Crystal Enterprise folder where you want the report saved.

Logging On to Crystal Enterprise to Save or Load a Report

Access the Log On to Crystal Enterprise dialog.

The Log On to Crystal Enterprise dialog from Crystal Reports.

System	Enter the name of the Crystal Enterprise Server.
User Name	Enter the name of the domain you wish to log on to and your EnterpriseOne user ID separated by a backslash; for example: PROD\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.
Password	Enter the password for your user ID.
Authentication	Select <i>PeopleSoft EnterpriseOne</i> from the pull-down menu.

PART 3

Crystal Enterprise for PeopleSoft

Chapter 8

Understanding Crystal Enterprise for PeopleSoft

Chapter 9

Creating a Link from EnterpriseOne Menu to Crystal Enterprise for PeopleSoft

Chapter 10

Administering Crystal Enterprise for PeopleSoft

Chapter 11

Using Crystal Enterprise for PeopleSoft

CHAPTER 8

Understanding Crystal Enterprise for PeopleSoft

This chapter provides an overview of Crystal Enterprise for PeopleSoft.

Crystal Enterprise for PeopleSoft Users

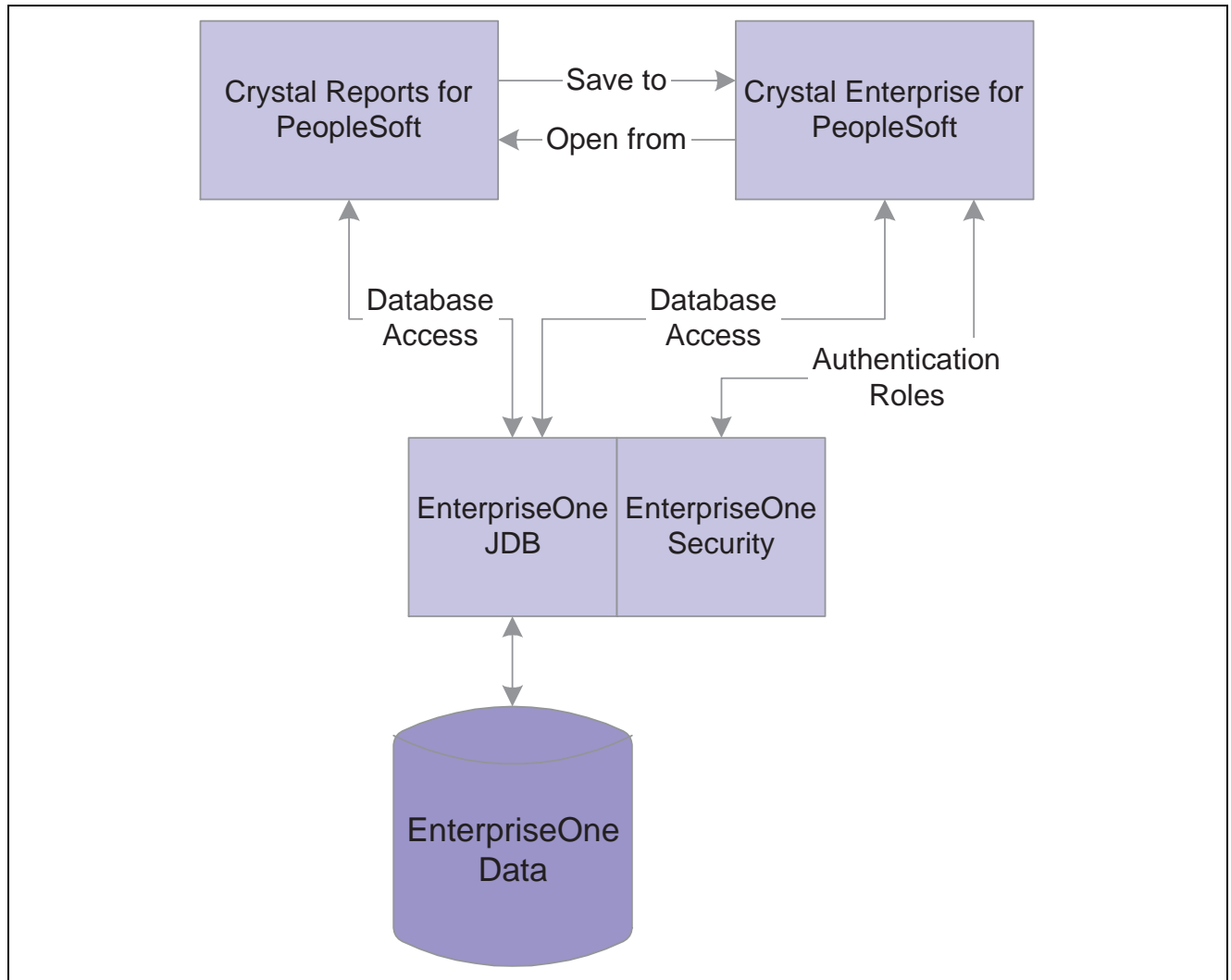
There are two types of users for Crystal Enterprise for PeopleSoft: administrators and users. Administrators use it to control who has access to reports and data in reports. Users access reports through the web.

The administrator primarily uses the Crystal Management Console (CMC). The CMC enables you to perform user management tasks such as setting up authentication and administering rights to groups. The CMC functions exactly as it does for a standard installation of Crystal Enterprise, with two exceptions. Under Authentication there is a PeopleSoft EnterpriseOne tab where you define domains and roles. Also, if you select an object, and then the Process tab for that object, there is a Database dialog where you set the default information for logging into the databases whenever the report is run.

The user views and schedules reports. To do this, the user must first log onto Crystal Enterprise for PeopleSoft through the security plugin. The security plugin checks to ensure that the user is a member of a valid role and gives the user the permissions assigned to that role. If the user is a member of multiple roles, the security plugin gives the user the sum of the permissions of all associated roles. Once the user is in Crystal Enterprise, the user can select a report and select view, view latest, history, or schedule. When the user selects an option that requires current data, the user must log on to the data adapter.

Crystal Enterprise for PeopleSoft Integrations

The graphic below illustrates how Crystal Enterprise for PeopleSoft integrates with Crystal Reports for PeopleSoft and PeopleSoft EnterpriseOne.



The Integration of Crystal Enterprise for PeopleSoft with Crystal Reports for PeopleSoft and PeopleSoft EnterpriseOne.

Crystal Enterprise for PeopleSoft stores reports created using Crystal Reports for PeopleSoft. When you view or run a report, Crystal Enterprise for PeopleSoft retrieves the data using a data adapter from the EnterpriseOne JDB, which in turn access EnterpriseOne data. Because of this, if a table is edited, created, or deleted, the changes will not be reflected in Crystal Enterprise for PeopleSoft until the EnterpriseOne server is restarted.

Crystal Enterprise for PeopleSoft gets roles and performs authentication by interacting using a security plugin with EnterpriseOne security. If Crystal Enterprise for PeopleSoft does not list PeopleSoft EnterpriseOne as an authentication type, then you must install the Crystal Enterprise for PeopleSoft-Integration. Because of this integration, if you edit user or role rights, the changes will not take effect until the EnterpriseOne server is restarted.

CHAPTER 9

Creating a Link from EnterpriseOne Menu to Crystal Enterprise for PeopleSoft

This chapter provides an overview of how to create your own link from EnterpriseOne Menu to Crystal Enterprise for PeopleSoft.

Understanding Links from EnterpriseOne Menu to Crystal Enterprise for PeopleSoft

You can access Crystal Enterprise independently from the browser. You can also create a link to Crystal Enterprise for PeopleSoft from EnterpriseOne menu, giving you the ability to exit from EnterpriseOne to Crystal Enterprise for PeopleSoft.

When creating the link form EnterpriseOne Menu to the task, use the values from this table:

Field	Value
Task Name	<i>Crystal Enterprise for PeopleSoft or Crystal Management Console</i>
Product Code	<i>55 through 59</i>
Task Type	<i>URL</i>
URL	In standard installations, <i>http://serverName:port/crystal/enterprise10/desktoplaunch/ePortfolio/default.htm</i> for Crystal Enterprise, or <i>http://serverName:port/crystal/enterprise10/admin/default.htm</i> for Crystal Management Console. <i>serverName</i> is the name of your webserver. <i>port</i> is the network port number for your webserver.

See Also

EnterpriseOne Tools 8.94 PeopleBook: Foundation

Prerequisite

To create a link to Crystal Reports for PeopleSoft from Task Explorer you must have permissions to add menu items in Task Explorer. If you do not have permissions, contact your system administrator.

CHAPTER 10

Administering Crystal Enterprise for PeopleSoft

This chapter discusses the CMC and discusses how to:

- Log on to the CMC.
- Administer reports.
- Administer authentication

Understanding the CMC

The CMC enables you to manage the Crystal Enterprise System. As part of the EnterpriseOne 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 EnterpriseOne tab has been added to the Authentication page. You use the PeopleSoft EnterpriseOne tab to:

- Enable PeopleSoft EnterpriseOne 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.

Forms Used to Log on to the CMC

Form Name	Form ID	Navigation	Usage
Crystal Management Console Log On	NA	From the Crystal Enterprise User Launchpad, select <i>Admin Launchpad</i> , then click <i>Crystal Management Console</i> .	Log on to the CMC

Logging on to the CMC

Access the Crystal Management Console Log On dialog.

The Crystal Management Console Log On dialog.

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 EnterpriseOne user ID separated by a backslash; for example: PROD\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.
Password	Enter the password for the administrator.
Authentication Type	Select <i>PeopleSoft EnterpriseOne</i> to authenticate against EnterpriseOne.

Administering Reports

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

Forms Used to Administer Reports

Form Name	Form ID	Navigation	Usage
Process-Database	NA	After logging on to CMC, click the Objects link. Select a crystal report. Select the Process tab, then click the Database button.	Set the default information for logging into the data source automatically whenever the report is run.

Administering EnterpriseOne Settings for Reports

Access the Process-Database dialog.

Crystal Management Console | Preferences | Logoff | Register | About | Help
 Account: Administrator

Home > Folders > User Folders > RR6952045 > F0101.rpt

Properties | **History** | **Process** | **Schedule** | **Rights**

Database | Parameters | Filters | Print Setup

Set the default information for logging onto the data source(s) automatically whenever the report is run.

Data Source(s):
 QEFASEN1

☐ Use original database logon information from the report

Server: QEFASEN1
 Database: JPY811
 User: RR6952045
 Password:

☒ Use custom database logon information specified here

Database Type: ☐ Select a database driver
☒ Specify a custom driver
 crdb_pseone

Server: QEFASEN1:6012
 Database: JPY811
 User:
 Password:

Table Prefix: ☐ Use default table prefix
☐ Specify a custom table prefix

The Process-Database dialog.

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 EnterpriseOne server and environment from which to run the report.
Server	Enter the name of the server set up for the default EnterpriseOne data source.
Database	Enter the name of the EnterpriseOne environment set up for the default EnterpriseOne data source.
User	Enter the EnterpriseOne user ID used to log on to the EnterpriseOne data source when retrieving data for the report. Your user ID should be entered in upper case.
Password	Enter the password for the EnterpriseOne 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 EnterpriseOne data source than was originally associated with the report.
Database Type	To connect to an EnterpriseOne data source, keep the default selection of <i>Specify a custom driver, crdb_pseone</i> .
Server	Enter the name of the server and port (in the format server:port) to be used for the custom EnterpriseOne data source.
Database	Enter the name of the EnterpriseOne environment to be used for the custom EnterpriseOne data source.
User	Enter the EnterpriseOne user ID to be used to log on to the custom EnterpriseOne data source
Password	Enter the password for the EnterpriseOne user ID specified above.
Table Prefix	For EnterpriseOne integration, do not enter a table prefix. Keep the default option of <i>Use default table prefix</i> .
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 PeopleSoft EnterpriseOne Authentication

This section discusses how to set up PeopleSoft EnterpriseOne authentication.

Forms Used to Administer PeopleSoft EnterpriseOne Authentication

Form Name	Form ID	Navigation	Usage
Authentication-PeopleSoft EnterpriseOne	NA	From the Crystal Management Console, select Authentication, then select the PeopleSoft EnterpriseOne tab.	Maps security from EnterpriseOne to Crystal Enterprise.

Using PeopleSoft EnterpriseOne Authentication

This information should initially be set up automatically during your install.

Access the Authentication-PeopleSoft EnterpriseOne dialog.

The PeopleSoft EnterpriseOne Authentication dialog.

Enable PeopleSoft EnterpriseOne Authentication

You must select this field to allow Crystal Enterprise to map to PeopleSoft EnterpriseOne for security and authentication.

User

Enter a user ID that will be used by Crystal Enterprise for PeopleSoft to connect to all configured EnterpriseOne servers. The user ID you enter must be valid for all EnterpriseOne servers and environments defined in the domain section of this page. We recommend that you use an administrator user name. The user ID should be entered in upper case.

	To specify a role other than *ALL, append @ <i>ROLE</i> after the user ID, where <i>ROLE</i> is the role that the system user should act under. <i>ROLE</i> must be all uppercase.
Password	Enter the password for the user ID entered in the line above. This password must be valid for all EnterpriseOne servers and environments defined in the domain section of this page. Furthermore, this field must be updated if the password for the system user changes.
New PeopleSoft EnterpriseOne Domain	Enter any new domain you wish to add to the list of current domains. Enter the domain in the format DOMAIN = HOST:PORT:ENV. To make logging on easier for your users, we recommend that you assign the domain the same name as the environment.
Current PeopleSoft EnterpriseOne Domains	Add, delete, and define the default EnterpriseOne domains. A domain is defined as an EnterpriseOne server, an EnterpriseOne server port, and an environment, separated by colons; for example: Server:Port:Environment. If there are multiple domains, you can also assign a default domain in the next field.
Default PeopleSoft EnterpriseOne Domain Name	Enter the domain Crystal Enterprise will use if the user does not specify a domain when logging onto Crystal Enterprise.
New PeopleSoft EnterpriseOne 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 EnterpriseOne Roles	Add and delete mapped EnterpriseOne roles. Only users who are in a mapped role will be allowed to logon to Crystal Enterprise. A role is defined as the domain and role separated by a backslash; for example: DOMAIN\ROLE
Assign each added PeopleSoft EnterpriseOne 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 EnterpriseOne account. EnterpriseOne 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 EnterpriseOne accounts, are added as new users.
Create a new account for every added PeopleSoft EnterpriseOne 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 EnterpriseOne 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 EnterpriseOne user mapped to Crystal Enterprise.
No new aliases will be added and new users will not be created	Select this option if the EnterpriseOne directory you are mapping contains many users, of which only a few will use Crystal Enterprise. Crystal Enterprise will 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 EnterpriseOne 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 access licenses. Concurrent access 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 access licenses can support a large user base.

When Crystal Enterprise for PeopleSoft EnterpriseOne is shipped, it includes three concurrent access licenses.

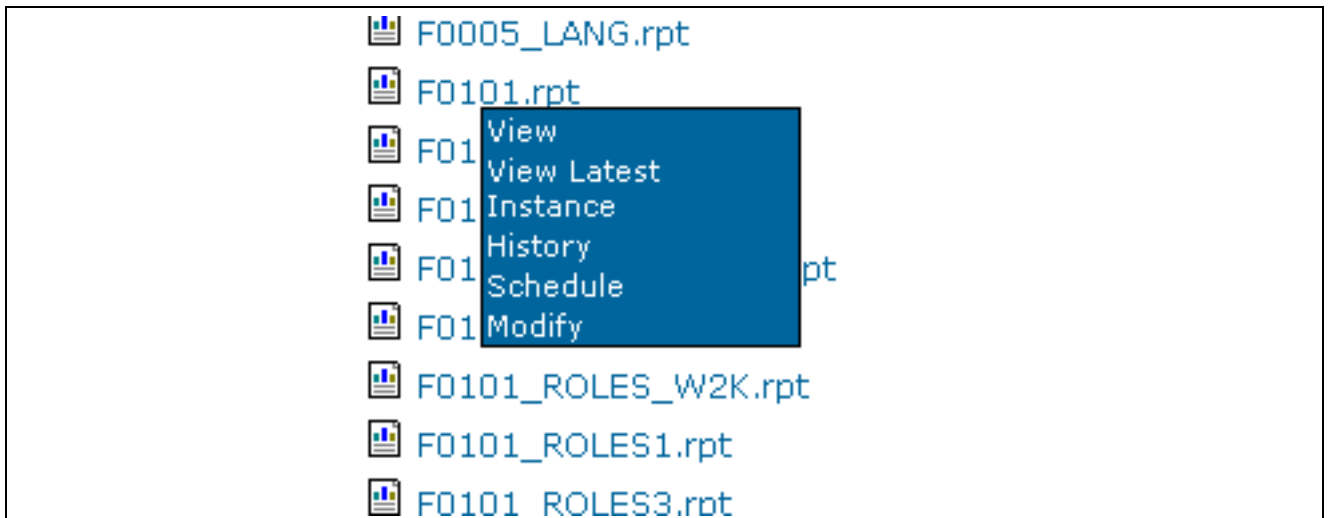
CHAPTER 11

Using Crystal Enterprise for PeopleSoft

This chapter provides an overview of Crystal Enterprise functions.

Understanding Crystal Enterprise Functions

When you click on a report in Crystal Enterprise, you have some or all of the following functions available depending on your role:



The menu for a report.

- View

View displays the report with current data. When you select view, the Data Adapter Log On dialog appears. You might not have permissions to view a report, in which case, View will not appear as an option.

- View Latest Instance

View Latest Instance displays the report with the data from the last time it was run. This option only appears if the report has been run previously. If you wish to see the latest data from a View Latest Instance report, click the Refresh icon. The Data Adapter Log On dialog appears. If you do not have permissions to view a report, you will not have permissions to refresh a report.

- 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. When you schedule a report you must select *Database Logon* from the Customize your Options field, and then logon to the database for the report to run successfully. Which fields are populated by the system in the Database Logon dialog are dependent on the report settings specified in the CMC.

- 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. When you click Refresh, the Data Adapter Log On dialog displays.

- Modify

Modify allows you to modify the displayed fields, grouping, sorting, filters, and other features of the report. This option launches a wizard that leads you through the modifications.

Understanding Guest Accounts

Crystal Enterprise for PeopleSoft includes a guest account. Using the guest account, you can use Crystal Enterprise for PeopleSoft without logging on. If the guest account is enabled, no logon screen displays when you first enter Crystal Enterprise for PeopleSoft. However, if you want more functionality than is provided to the guest account, you must log on.

The guest account has a number of advantages and disadvantages. Advantages include a simpler method of accessing reports and less administrative overhead. Disadvantages include that its generic access does not include specific security and that you have less ability to track user actions.

The largest disadvantage to using a guest account is that it uses a concurrent access license. When all concurrent access licenses are in use, people trying to log on to Crystal Enterprise for PeopleSoft will be denied access until a concurrent access license is released. If enough people are logged on using a guest account, other people, even those who log on with their credentials, may be denied access to the system. If you log on to your regular account, when you log off, the system logs you back on as a guest. You have to log off a second time to free the guest account and the concurrent access license. Because of this, you may want to disable the guest account. You can do this in the CMC by selecting Users, then Guest, and selecting the option for Account is Disabled.

Crystal Management Console

Preferences | Logoff | Register | About | Help

Home Go

Account: Administrator

Home > Users > Guest

PropertiesMember ofRights

Guest account

Description:

Home Folder: [Guest](#)

Enterprise Password Settings:

Password: *****

Confirm: *****

☐ Password never expires

☐ User must change password at next logon

☐ User cannot change password

Connection Type:

☒ Concurrent User

☐ Named User

☒ Account is disabled

Alias:

Authentication Type:

Enabled: [Assign Alias...](#) [New Alias...](#)

Guest account disabling.

Logging on to Crystal Enterprise

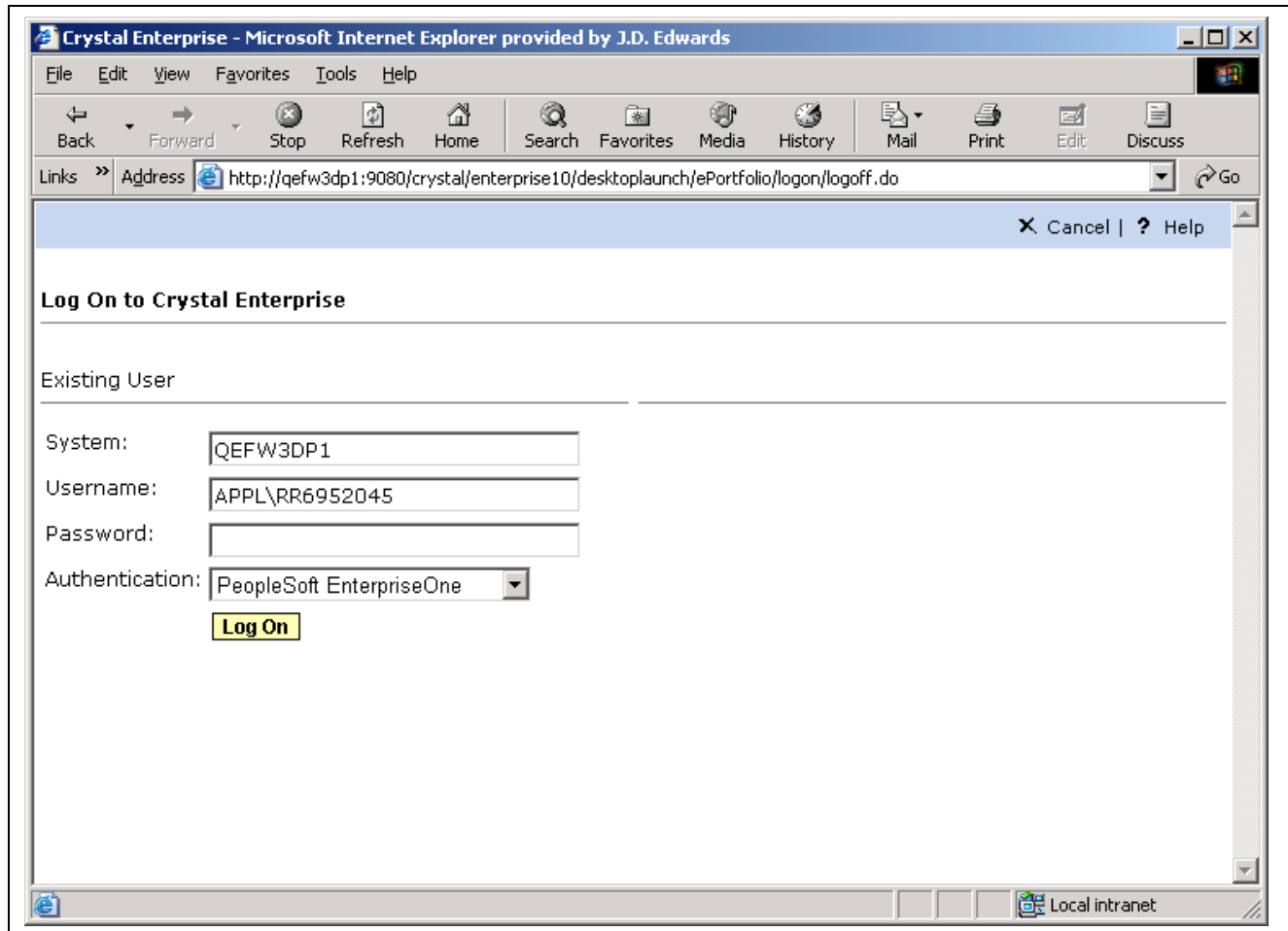
This section discusses how to log on to Crystal Enterprise.

Forms Used to Log on to Crystal Enterprise

Form Name	Form ID	Navigation	Usage
Log On to Crystal Enterprise	NA	From the Crystal Enterprise User Launchpad, select Crystal Enterprise.	Gain access to Crystal Enterprise functionality.

Logging on to Crystal Enterprise

Access the Log On to Crystal Enterprise dialog.



Log On to Crystal Enterprise dialog.

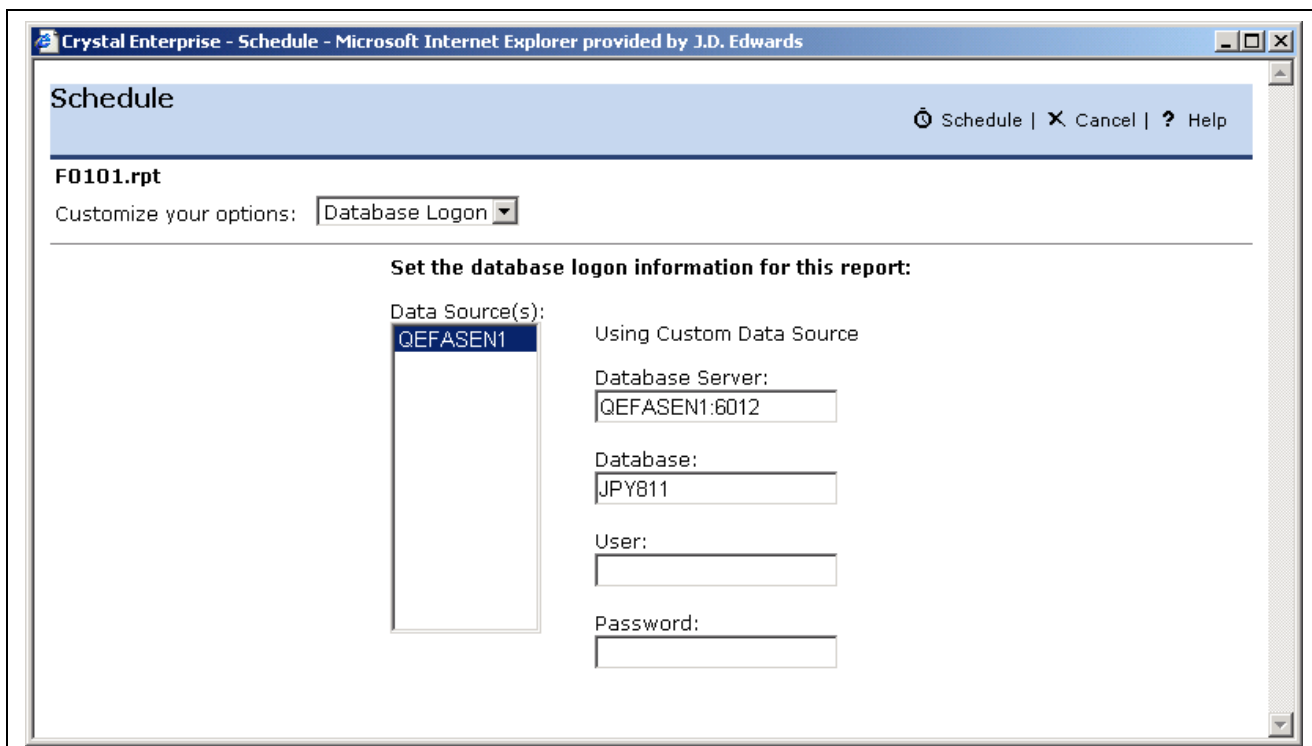
System	Enter the name of the Crystal Enterprise Server.
Username	Enter the name of the domain and your user ID separated by a backslash; for example: PROD\USERID. If a default domain has been set for Crystal Enterprise, you can log on to the default domain by simply entering your user ID. The user ID should be entered in upper case.
Password	Enter the password for your user ID.
Authentication	Select <i>PeopleSoft Enterprise</i> from the pull-down menu.

Scheduling a Report

When you schedule a report using Crystal Enterprise for PeopleSoft you must select *Database Logon* in the Customize your options field. This displays the Database Logon dialog for the report. Completing this dialog gives you access to the data for the report when the report runs by using the data adapter.

Scheduling Reports

Access the Database Logon dialog.



The Database Logon dialog for scheduling a report.

Customize your options	Select <i>Database Logon</i>
Data Sources	Displays the data sources used to build the report. Select each data source and complete log on information for each.
Database Server	Enter the name of the Enterprise Server and port. Depending on how the report is setup, you may have the option of entering a server. If you do, enter it in the format SERVER:PORT
Database	Enter the EnterpriseOne environment for the report. Depending on how the report is setup, you may or may not have the option of specifying the environment.
User	Enter the EnterpriseOne user ID or, if you want to change from the default role of *ALL, user@role. The user ID and role should be entered in upper case.
Password	Enter the EnterpriseOne password.

Logging on to the Data Adapter

Whenever you attempt to view a report with the most current data, whether by selecting view, by selecting view latest and clicking refresh, or by viewing an historical report and clicking refresh, the Database Logon dialog appears. You must complete this dialog to access current data for the report using the data adapter.

Viewing Report Data Using the Database Logon

Access the Database Logon dialog.

Crystal Reports Viewer - Microsoft Internet Explorer provided by J.D. Edwards

The report you requested requires further information.

Database Logon

QEFASEN1 - JPY811

Server Name QEFASEN1

Database Name JPY811

User ID

Password

The Database Logon dialog for viewing current data in a report.

Server Name	Displays the name of the EnterpriseOne server where report data is stored.
Database Name	Displays the EnterpriseOne environment where the report data is stored.
User ID	Enter the EnterpriseOne user ID, or if you want to change form the default role of *ALL, user@role The user ID and role must entered in upper case.
Password	Enter the EnterpriseOne password of the user.

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	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>
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.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
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 event	<p>In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.</p> <p>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).</p>
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	<p>In PeopleSoft Enterprise Campus Solutions, a specific offering of a course component within an academic term.</p> <p>See also <i>course</i>.</p>
Class ChartField	<p>A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i>.</p>
clearance	<p>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.</p>
clone	<p>In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.</p>
cohort	<p>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.</p> <p>See also <i>population</i> and <i>division</i>.</p>
collection	<p>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.</p>
collection rule	<p>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.</p>
comm key	<p>See <i>communication key</i>.</p>
communication key	<p>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 <i>comm keys</i> or <i>speed keys</i>) can be created for background processes as well as for specific users.</p>
compensation object	<p>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.</p>
compensation structure	<p>In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.</p>
condition	<p>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.</p>
configuration parameter catalog	<p>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.</p>
configuration plan	<p>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.</p>

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	<p>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.</p> <p>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.</p> <p>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.</p>
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	<p>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.</p> <p>See also <i>class</i>.</p>
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 elements	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
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

	<p>default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.</p> <p>In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.</p>
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
division	<p>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.</p> <p>See also <i>population</i> and <i>cohort</i>.</p>
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
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	<p>A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
event propagation process	<p>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.</p>
exception	<p>In PeopleSoft Receivables, an item that either is a deduction or is in dispute.</p>
exclusive pricing	<p>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.</p>
fact	<p>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.</p>
financial aid term	<p>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.</p>
forecast item	<p>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.</p>
fund	<p>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.</p>
gap	<p>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.</p>
generic process type	<p>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.</p>
gift table	<p>In PeopleSoft Enterprise Campus Solutions, a table or so-called <i>donor pyramid</i> 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.</p>
GL business unit	<p>Abbreviation for <i>general ledger business unit</i>. A unit in an organization that is an independent entity for accounting purposes. It maintains its own set of accounting books.</p> <p>See also <i>business unit</i>.</p>
GL entry template	<p>Abbreviation for <i>general ledger entry template</i>. 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</p>

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.

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 <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.
LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
LMS	Abbreviation for <i>learning management system</i> . 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 <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
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 <i>3C engine</i> .
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	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 <i>need analysis</i> .
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
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 application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
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 <i>division</i> and <i>cohort</i> .
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 category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
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 <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.
record output VAT flag	Abbreviation for <i>record output value-added tax flag</i> . See <i>record input VAT flag</i> .
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 <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

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.
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	<p>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.</p> <p>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.</p>
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 <i>communication key</i> .
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 <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
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.
3C engine	Abbreviation for <i>Communications, Checklists, and Comments engine</i> . 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 <i>Communications, Checklists, and Comments group</i> . 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 <i>locked</i>) 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 <i>inquiry access</i> .
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.
work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
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 schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

A

- additional documentation viii
- administering
 - Crystal Reports 29
 - objects 35
- application fundamentals vii
- authenticating users 36
- Authentication-PeopleSoft EnterpriseOne dialog 37

B

- binary large objects 21

C

- CMC 29
- comments, submitting xii
- common elements xii
- Connection dialog 16
- contact information xii
- cross-references xi
- Crystal Enterprise Menu dialog 41
- Crystal Management Console (CMC) 29
- Crystal Management Console Log On dialog 34
- Crystal Reports administering 29
- Customer Connection website viii

D

- data
 - accessing 21
 - understanding 21
- data adapter 5
- data sources
 - connecting 15
 - selecting 15
 - setting options 17
 - understanding 15
- Database Logon dialog 44, 45
- dialogs
 - Authentication-PeopleSoft EnterpriseOne 37
 - Connection 16
 - Crystal Enterprise Menu 41
 - Crystal Management Console Log On 34

- Database Logon 44, 45
- Guest 42
- Log On to Crystal Enterprise 26, 43
- Options 17
- Process-Database 35
- Set Datasource Location 22
- documentation
 - printed viii
 - related viii
 - updates viii
- domain 6

E

- errors
 - blank field values 21
 - “Failed to open a rowset — no data in table.” 21

F

- field names 21

G

- glossary 47
- guest accounts 42
- Guest dialog 42

I

- integrations
 - Crystal Enterprise for PeopleSoft 6, 29, 30
 - Crystal Reports for PeopleSoft 6, 11
 - data source 15

L

- links
 - creating 13, 31
 - understanding 13, 31
- loading reports 25
- Log On to Crystal Enterprise dialog 26, 43

M

- media objects 21
- MMA Partners viii

N

notes xi

O

objects, administering 35

opening reports 25

Options dialog 17

P

PeopleBooks

ordering viii

PeopleCode, typographical conventions x

PeopleSoft application fundamentals vii

prerequisites vii

printed documentation viii

Process-Database dialog 35

R

related documentation viii

reports

loading 25

opening 25

saving 25

scheduling 44

viewing 29

role 6

S

saving reports 25

scheduling reports 29

security plugin 5

Set Datasource Location dialog 22

suggestions, submitting xii

T

terms 47

typographical conventions x

V

viewing reports 29

visual cues xi

W

warnings xi