PEOPLE Soft

PeopleTools 8.12 Crystal Reports PeopleBook

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SKU MTCRr8SP1B 1200

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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A BOUT T HIS P EOPLE B OOK

Crystal Reports for PeopleSoft from Seagate software is a report formatter that helps you generate clear and easy-to-read printed reports containing data from your PeopleSoft applications. You can generate standard reports we've already created for you and saved in Crystal, or create your own custom reports.

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

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

Note. Before you can generate standard reports formatted in Crystal, you must install the Crystal Reports Pro for Windows application. See Seagate's **Crystal Reports** documentation for more information.

For more information, see Using Crystal Reports.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

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

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of the specific PeopleSoft applications your company uses. You can access

additional documentation for this release from PeopleSoft Customer Connection (www.peoplesoft.com). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection Web site: http://www.peoplesoft.com/

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of 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 delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this PeopleTools release is provided in HTML format on the PeopleTools PeopleBooks CD-ROM. The documentation for the PeopleSoft applications you have purchased appears on a separate PeopleBooks CD for the product line.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press Web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press Web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet   From the main PeopleSoft Internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order.

PeopleSoft Internet site: http://www.peoplesoft.com/.

Telephone	Contact Consolidated Publishing Incorporated (CPI) at **800 888 3559.**
Email	Email CPI at callcenter@conpub.com.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates PeopleCode.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold). We also use boldface when we refer to navigational paths, menu names, or process actions (such as **Save** and **Run**).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0*, not the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Jump links	Indicates a jump (also called a link, hyperlink, or hypertext link). Click a jump to move to the jump destination or referenced section.

Cross-references	The phrase For more information indicates where you can find additional documentation on the topic at hand. We include the navigational path to the referenced topic, separated by colons (:). Capitalized titles in *italics* indicate the title of a PeopleBook; capitalized titles in normal font refer to sections and specific topics within the PeopleBook. Cross-references typically begin with a jump link. Here's an example:

For more information**,** see <u>Documentation on CD-ROM</u> in *About These PeopleBooks:* Related Documentation.

• Topic list	Contains jump links to all the topics in the section. Note that these correspond to the heading levels you'll find in the Contents window.
Name of Page or Dialog Box	Opens a pop-up window that contains the named page or dialog box. Click the icon to display the image. Some screen shots may also appear inline (directly in the text).

Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates For more information cross-references to related or additional information.

Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Comments and Suggestions

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

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

Or send comments by email to the authors of the PeopleSoft documentation at:

mailto:DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

Using Crystal Reports

This documentation describes how to use the Crystal Reports functionality in PeopleTools. Crystal Reports builds directly on queries you create in PeopleSoft Query, making it easy for you to deliver effective reports from your data. Many of the table and processing reports included with PeopleSoft are formatted in Crystal Reports. To generate printed reports, you can use either the Process Scheduler PeopleTool, or the Crystal Reports application window.

You can run many of the standard Crystal reports from menus in PeopleSoft applications. For more information, see Running Standard Reports from within Crystal Reports Pro.

Running Crystal Reports

You can run reports formatted in Crystal Reports in three ways:

• By selecting a menu option in your online PeopleSoft application.

• By launching Crystal Reports from PeopleSoft Query.

• By starting Crystal Reports in "standalone mode" and printing the report.

In general, we recommend running reports from within PeopleSoft applications when possible. This way you don't have to exit your PeopleSoft application.

Running Crystal Reports in Standalone Mode

If you run Crystal Reports in standalone mode (not launched from PeopleSoft Query or another PeopleSoft application), you must ensure that the current working directory is set properly, and you must first log on to the "PeopleSoft PeopleTools" server before opening any reports.

To run Crystal Reports in standalone mode

1. Select Start, Programs, Crystal Reports for 8.0 for PeopleSoft, Crystal Reports for PeopleSoft..

2. Open an existing report from the Crystal Reports Welcome dialog box by selecting **Open an Existing Report** and clicking **OK.**.
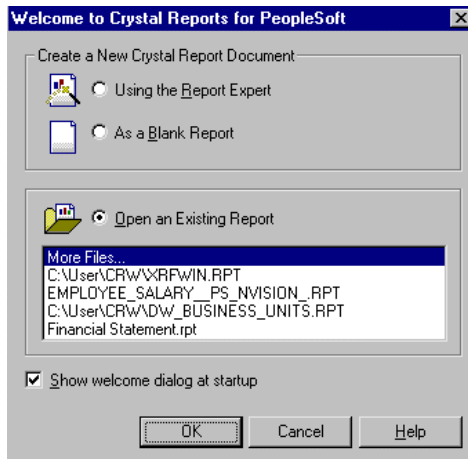
Welcome to Crystal Reports for Peoplesoft

3. The report opens in Crystal.

Running Crystal Reports from the Process Scheduler

Process Scheduler, which you use to request reports in PeopleSoft applications, gives you the option of running the report on your client workstation or on a Windows server without having to exit the PeopleSoft system or use a third-party scheduling program. What's more, if you schedule processes to run on a Windows NT server, you can choose to run the report at a later date and time.

With PeopleTools 8.1, you can also run processes using Process Scheduler from your browser using PeopleSoft Internet Architecture.

Note. You can use Process Scheduler to export a Crystal Report directly to a Lotus spreadsheet (.WKS file format). However, there is a limitation of 2048 rows of data per spreadsheet export.

For more information on using the Process Scheduler to generate reports, see Running Standard Reports from within Crystal Reports Pro

Running Standard Reports from within Crystal Reports Pro

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

To run a standard report

1. Select Start, Programs, Crystal Reports 8.0 for PeopleSoft, Crystal Reports 8.0 for PeopleSoft.


Opening Crystal Reports from the Windows Start menu

Note. You can also open Crystal Reports by double clicking its icon within the Windows program group created for Crystal Reports.

2. Once Crystal Reports is running, select the file you want to open from the Crystal Reports welcome dialog box.
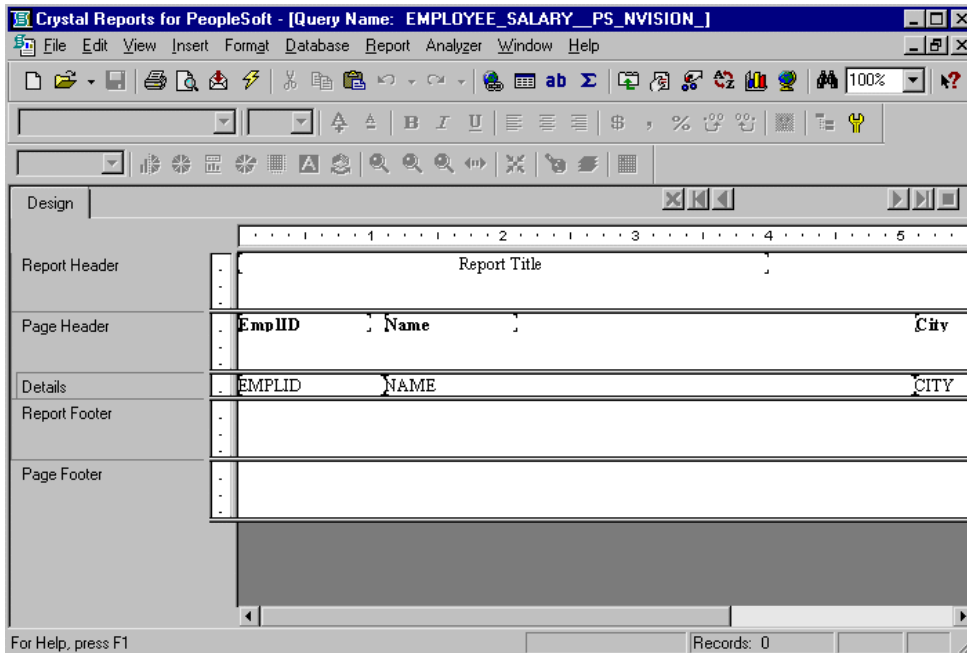
Crystal displays a list of report files, which use the .RPT file extension.
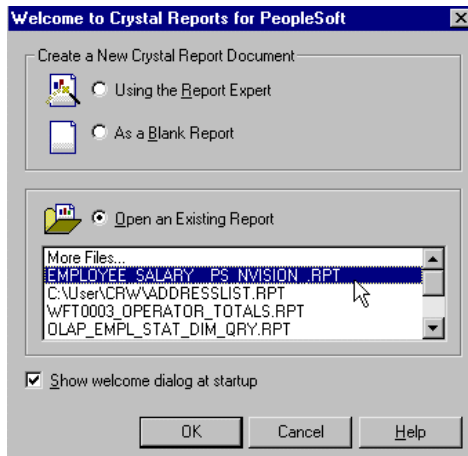
Welcome to Crystal Reports for PeopleSoft

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

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

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4. Scroll to the right to see all the Report Header elements identifying the report.

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

5. To view the report before you print, select **File, Print Preview** or click the button on the Crystal Reports toolbar.

If you haven't yet logged onto your PeopleSoft database, the system displays the sign-on dialog box for you to do so.
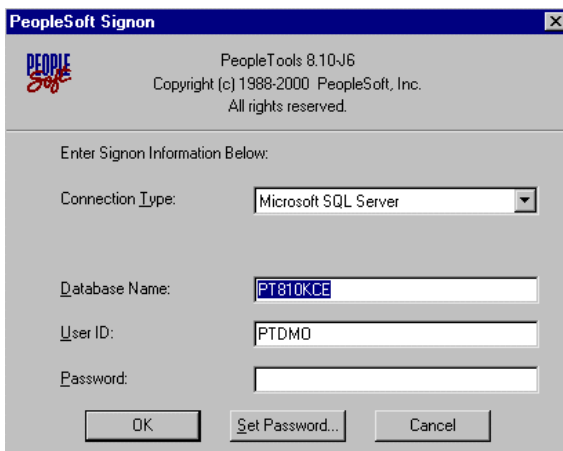
PeopleSoft Signon

You cannot generate a PeopleSoft report from Crystal Reports without being logged onto a PeopleSoft database—the system needs to retrieve data from the database for the report.

Once you've logged onto your database, Crystal Reports displays a print preview containing the data that will appear in the printed report.
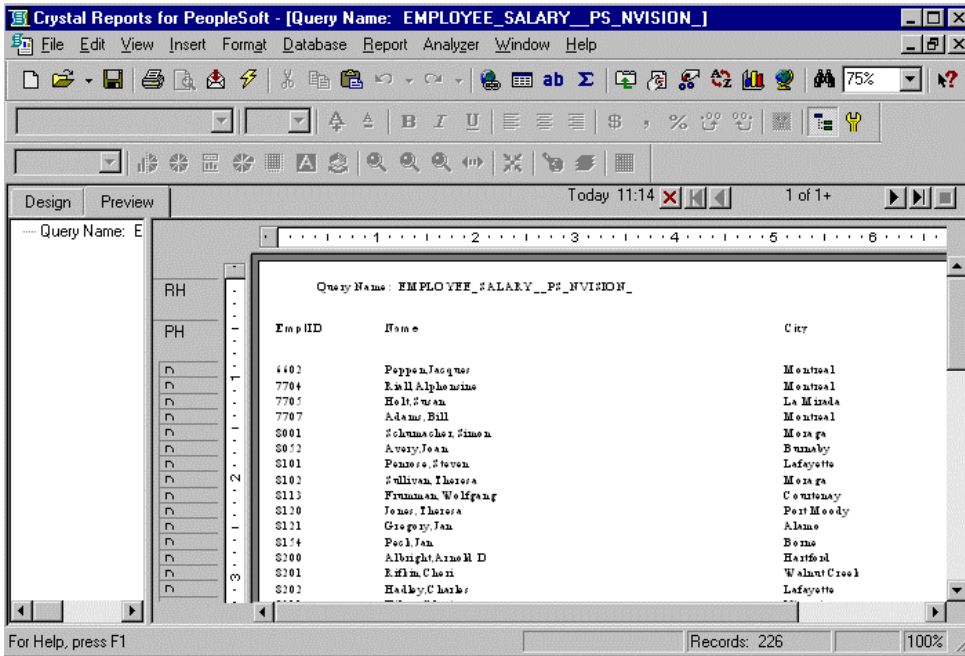
Print Preview

The print preview screen enables you to see all the rows of data that will print in the report.

To refresh the data and ensure that you see the most current information, click the ⚡ button on the Crystal toolbar, or select **Report, Refresh Report Data.**

If you need to, you can adjust the fields and objects in the report so that the report prints properly on your printer.

To print the report, select **File, Print** or click the 🖨 button on the Crystal toolbar.

As with many Microsoft Windows applications, you can choose to print the entire report or only a few pages, specify the number of copies to print, and indicate whether you want the copies collated.

Creating and Formatting New Crystal Reports

If you've chosen to license Crystal Reports, the ease with which you can create queries in PeopleSoft Query is enhanced even further. Once you've saved and run a query, you can use Crystal Reports to format printed output in no time. Just as you can run queries repeatedly, you can reuse the reports you create in Crystal.

> For more information on how to use Crystal Reports, see the documentation that comes with the Crystal Reports product.
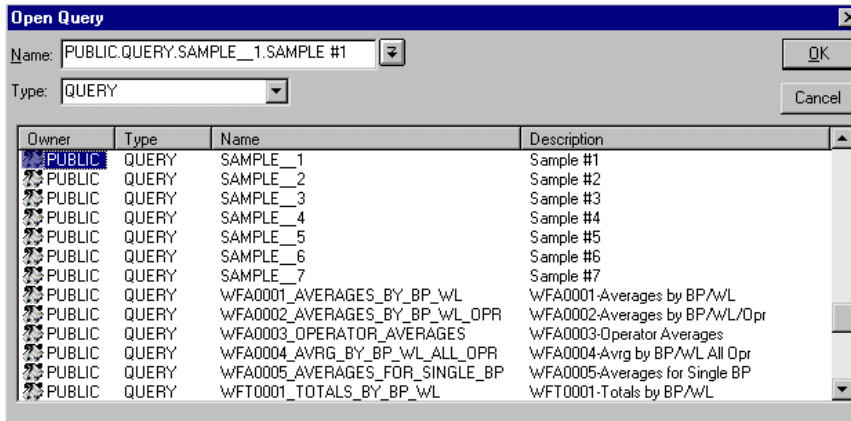
To run a query with Crystal Reports output

1. In your PeopleSoft application, select **Go, PeopleTools, Query.**

    PeopleSoft Query's Access Group panel is displayed.

2. Select **File, Open** or click [icon] to display the **Open Query** dialog box.

    The Open Query dialog is displayed.

Open Query dialog box

The **Open Query** dialog box is where you specify the query to be run and the output options.

3. Highlight the name of the query you want to base the report on and select **OK**.

4. Click **Run to Crystal Report** [icon] to run the query.

   The system automatically opens the Crystal Reports application.

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

> For more information about creating queries, see Using PeopleSoft Query.

Viewing the Report in Crystal Reports

Crystal Reports displays a new report template containing all the fields from the query you ran in PeopleSoft Query.
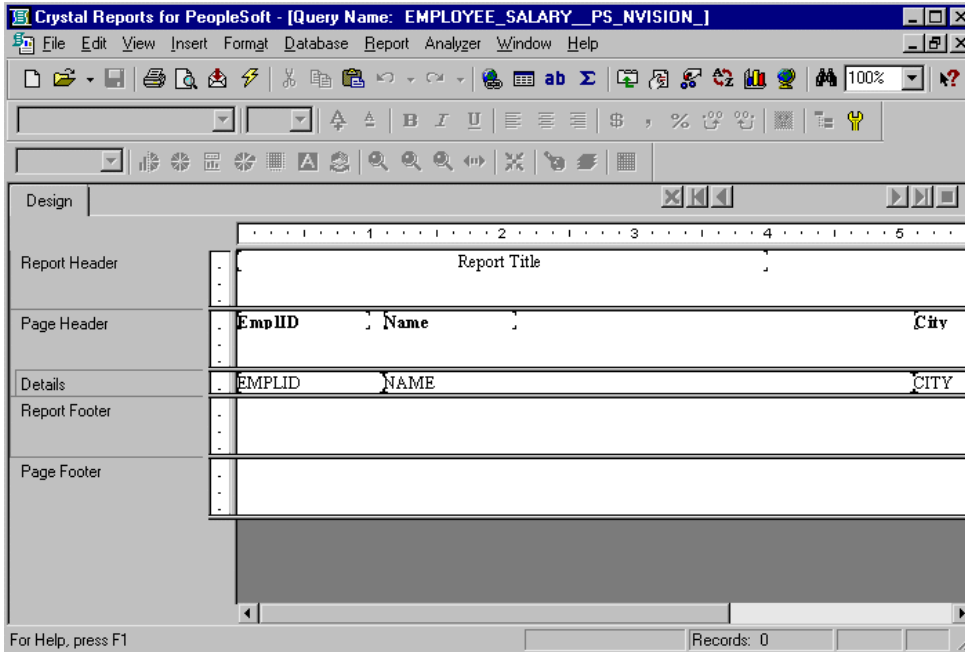
New Report Template

The report template contains three sections, described in the table below.

Section	Description
Report Header	Enter the title of the report.
Page Header	Enter or modify the column headings, and other identifying information.
Details	This is where the rows of data from your database will appear.
Report Footer	Enter information you would like in the footer of the report
Page Footer	Enter a page number or other information you want to display at the bottom of the page.

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

Modifying and Previewing Crystal Reports

You can change Crystal's default column headings and report titles, change fonts, add "print date" and other field types, and preview what your report will look like when printed.

To edit column headings

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

A ruler is displayed above the text object, and a hatched box appears around the text. Crystal's text formatting features (such as font, bold, italics, and so on) are available to you in this mode.
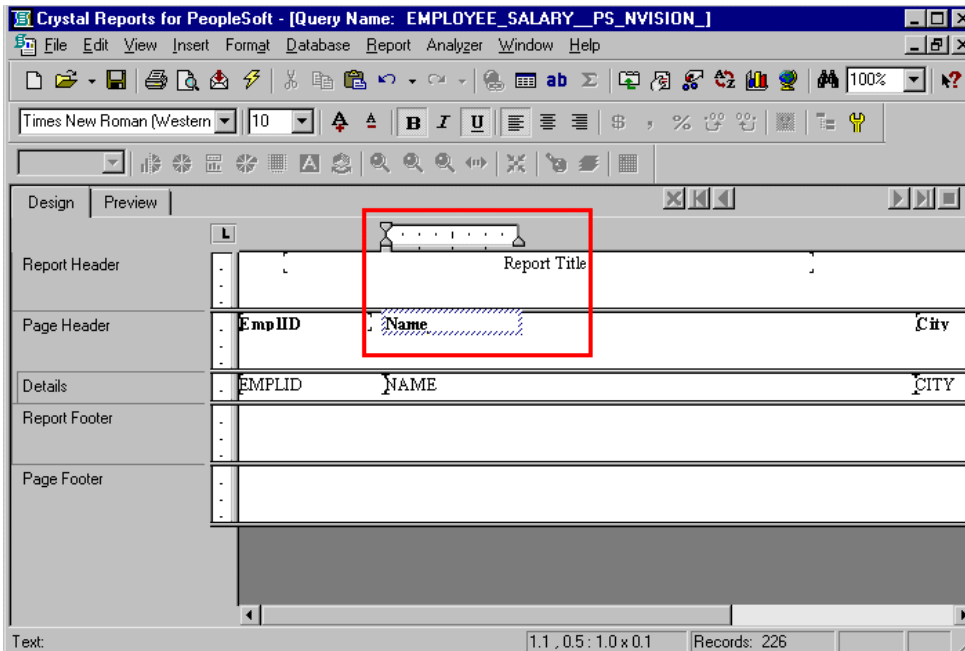
Editing a column heading

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

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

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

To change a report title's font attributes

1. Make sure the title is selected and select **Format, Font.**
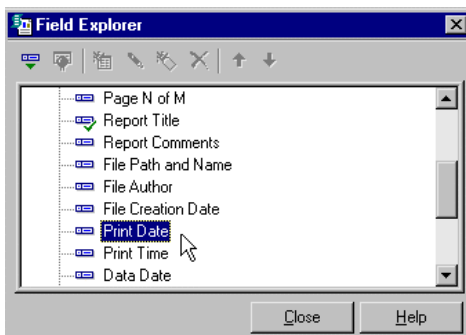
    The Format Editor dialog box appears.
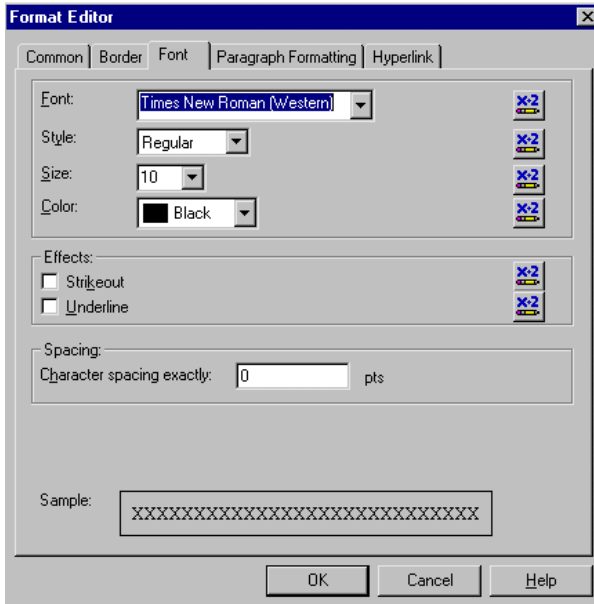
Format Editor dialog

2. Choose whatever **Font**, **Style**, **Size,** and **Color** you like.

To add a print date field

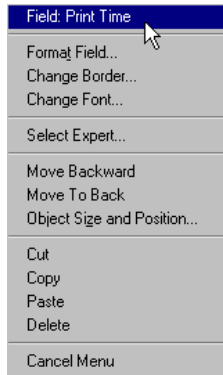1. Select Insert, Special Field to display the Field Explorer..

2. Highlight **Print Date** and drag it from the **Field Explorer** to the **Report Header** of the report.

    A box with Print Date appears where you clicked.

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

Adding a Print Date field

You can view your report as it will appear when you print it by clicking or by selecting **File, Print Preview.**

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

Saving and Printing the Report

You can save your report by clicking the button or selecting **File, Save.**

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

Note. If you want to be able to run your report directly from PeopleSoft Query, the query and report names must match in order to use the formatting you've just created in Crystal Reports every time you print the report. If you always update and print the report from within Crystal Reports, it doesn't matter. However, it is recommended that you leave the names the same so that you can run the queries from either Query or Crystal Reports.

Printing HTML Reports from Crystal

When you open an HTML file and print it from the browser, Crystal uses the default page setting to print the report. Sometimes, this will result in the right side of the report being cut off when it is sent to the printer, even though it appears in the Crystal Report viewer.

To change your default page settings to print HTML reports:

1. Select File, Page Setup.
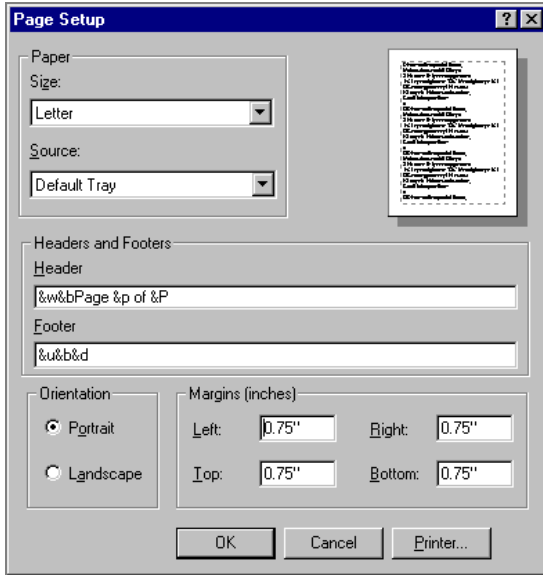
Crystal Page Setup dialog box

2. Change the left and right margin settings to create smaller margins. For example, you can enter 0.15" for both margins to ensure that the entire report prints correctly.

Creating a Default Crystal Report from Query

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

Note. Crystal uses the full query name (rather than the 8.3 file name format used in previous releases).

Additionally, Crystal Reports does not have direct access to the address space of Query. Therefore, any changes you make to the select list of a query object in Query will not be visible to Crystal Reports. To make these changes visible, you must save the query object. For a new or "unnamed" query object you can either save the query object or update the unnamed query object in the PeopleTools cache directory.

Do this by clicking the **Crystal Reports** button in PeopleSoft Query. In both cases, you will have to select **Database, Verify Database** in Crystal Reports to update the report definition.

The directory where the (ACTQRY).RPT file is stored is the default Crystal Report path that you define in Configuration Manager.
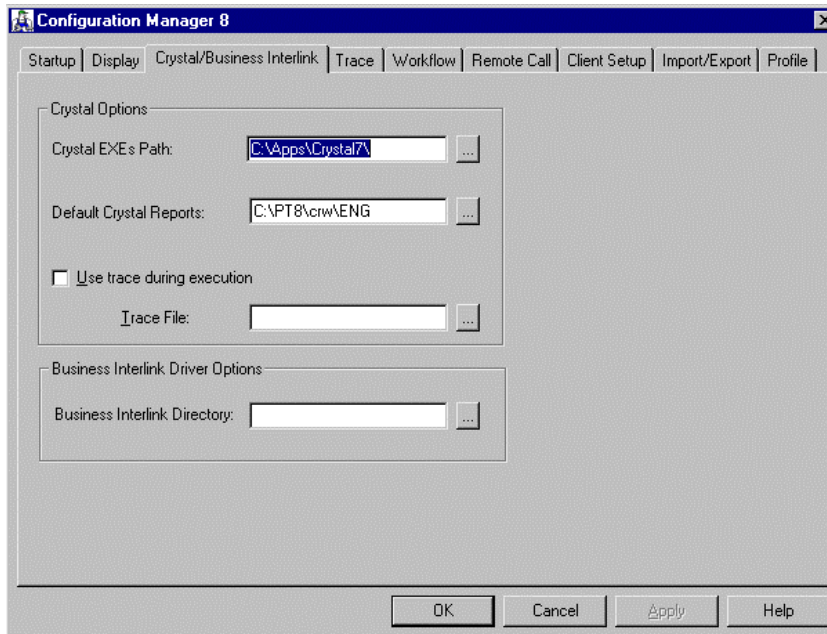
Crystal tab in Configuration Manager

If Query can't write the (ACTQRY).RPT file to this directory, the system displays an error message.
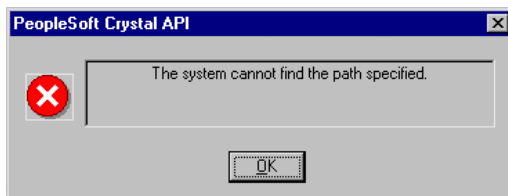
Invalid path error message

If you did not specify a path in Configuration Manager, Query will try to write the file to the your language directory beneath the CRWRPTPATH directory.

📝 **Note.** Always specify a valid default report path for Crystal Reports in Configuration Manager.

If CRWRPTPATH is not valid, Query will display an error indicating that it could not write the Crystal Report file. Typically, CRWRPTPATH is a read-only directory intended to hold production reports. For this reason, Query only writes to CRWRPTPATH as a last result.

📝 **Note.** CRWRPTPATH points to a single directory only.

Repeated Query Prompts

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

When queries include prompts, you will be prompted once at design time and once at runtime to enter the appropriate values. The reason for this behavior is related to the definition of a stored procedure. Most databases can return any number of result-set columns based solely on the input to a stored procedure. For Crystal to create a static report template, it must execute the stored procedure with the default parameter values once before it can request the definition of the result set. Because of this, the stored procedure (the query) is executed once at design time (to fill in the result set descriptions) and again at runtime (as expected).

📝 **Note.** You should also expect to be prompted when verifying the database in the report. The issue is the same as the design-time prompt followed by the run-time prompt issue above. Fill in the appropriate values after selecting to verify the database.

Crystal Reports Settings in Configuration Manager

The PeopleSoft system stores PeopleTools settings and preferences in the PeopleSoft Configuration Manager. Configuration Manager has a **Crystal** folder tab that enables you to change certain Crystal Reports settings. These settings are automatically set when you install PeopleTools with Crystal Reports, so you may not need to change them. If you need to, though, you can modify the settings.
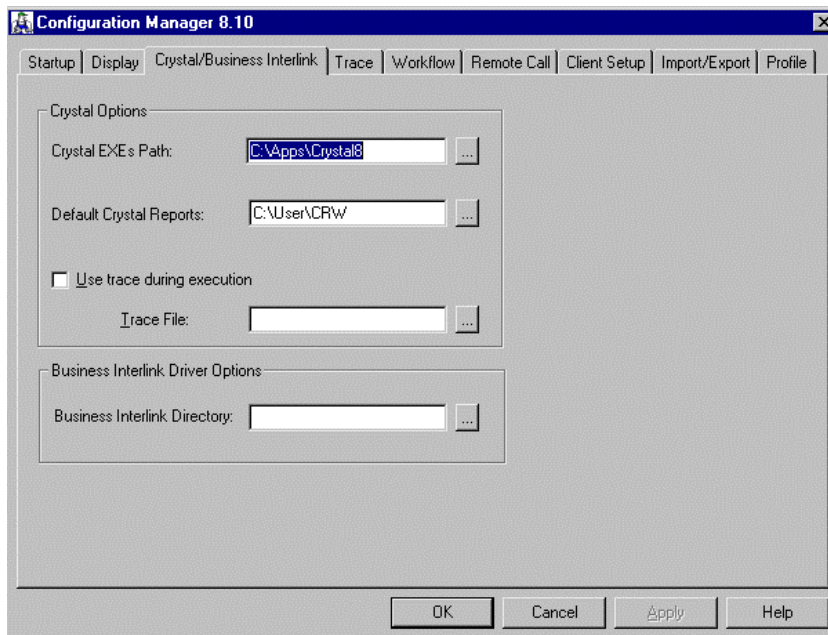
Configuration Manager 8.10

If you modify the Crystal settings in Configuration Manager, your PeopleSoft applications will reflect any changes you've made the next time you activate Windows and sign on to the PeopleSoft system.

The table below describes the options you can set through Configuration Manager.

Crystal Directories	Description
Crystal EXEs Path	The Crystal Reports executables directory.
Default Crystal Reports	The directory where you store reports created in-house, as opposed to those delivered with your PeopleSoft application(s).
Options	Description
Use Trace During Execution	If turned on, this option writes trace statements to a trace file by the name you specify in the **Trace File** box. This file is written to the workstation's %TEMP% directory.

In addition to the **Crystal** tab, Configuration Manager's **Process Scheduler** tab is where you set up more configuration information regarding Crystal Reports, including the Crystal Reports path location (CRWRPTPATH).

To navigate to Process Scheduler

1. Click the **Profile** tab.

2. Select a profile to edit.

3. Click the **Process Scheduler** tab on the Edit Profile panel.

    CRWRPTPATH is the path to Crystal report files (not the Crystal executables). Your Configuration Manager settings must be set correctly for **Process Scheduler** to initiate Crystal Reports processes successfully.
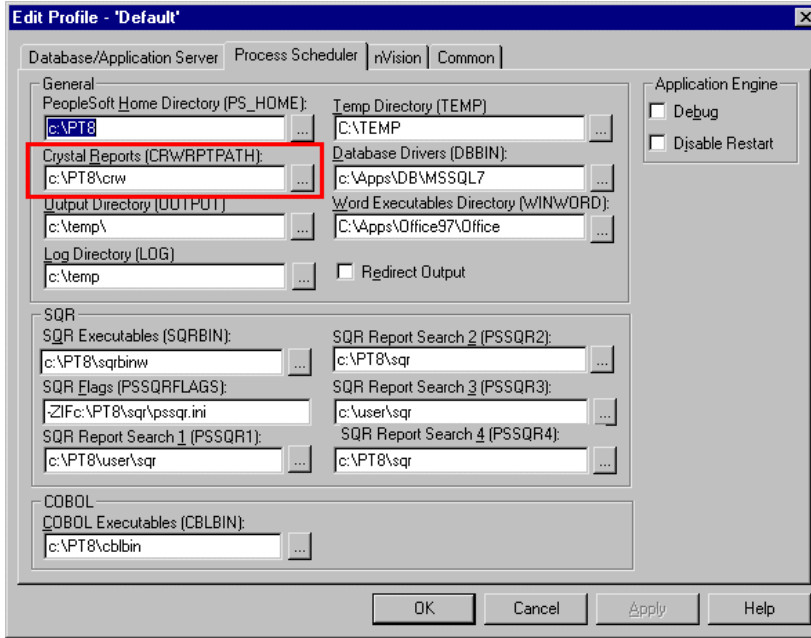
Process Scheduler Settings in Configuration Manager

📝 **Note.** Crystal reports in PeopleTools are language sensitive.

ℹ️ For more information on the globalization features of PeopleTools and Crystal, see Globalization.

Troubleshooting Crystal Reports

You can troubleshoot various Crystal Reports error messages by making sure your registry settings are correct. Always verify that your Configuration Manager settings are correct.

Getting More Information on Crystal Reports

Crystal Reports is a powerful reporting tool that has many more features than are described in this chapter.

ℹ️ For more information on the features and functions of Crystal Reports, see your Crystal documentation.

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