PeopleSoft Training

BRF Crystal_Reporting_9_1

Version Date: February 2014

COPYRIGHT & TRADEMARKS

Table of Contents

BRF Crystal_Reporting_9_1

Welcome to the **PeopleSoft Financials 9.1 Crystal Reporting** module! This module contains the information and tools needed to learn the basic concepts, terminology and procedures involved in accessing and running Crystal Reports available in PeopleSoft version 9.1.

Goal
To have the skills and knowledge to navigate, access and run the Crystal Reports in PeopleSoft version 9.1.

Participant Objectives
At the end of this module you will be able to:

1. Access the Crystal Launcher on PSDesktop.
2. Access and run the desired Crystal Reports.
3. Print the report results.
4. Utilize the Crystal toolbars and icons
5. Export/Save the results.
6. Close the current results and run the example report for another IBU.

NOTE: The functions in this manual must be performed in the PeopleSoft Report Database.

Logon to Crystal Reports via PS9.1 Launcher

Logon to Crystal Reports via PS9.1 Launcher

Procedure

In this topic you will learn the necessary steps to **Logon to Crystal Reports via PS9.1 Launcher**.

University Health™
Shreveport
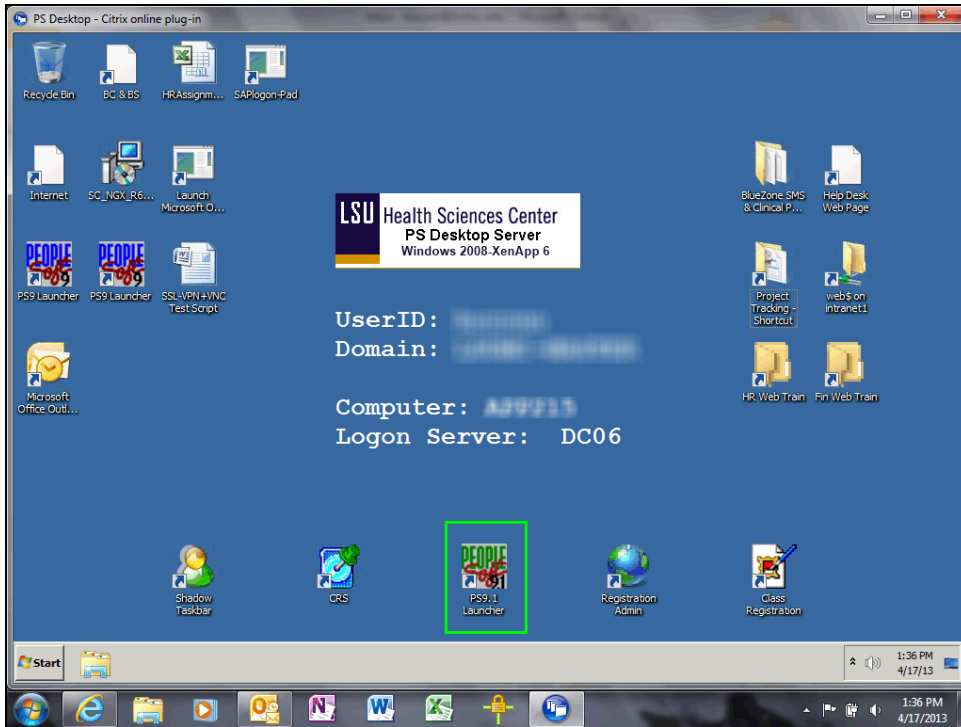
Step	Action
1.	Double-click the **PS9.1 Launcher** icon.
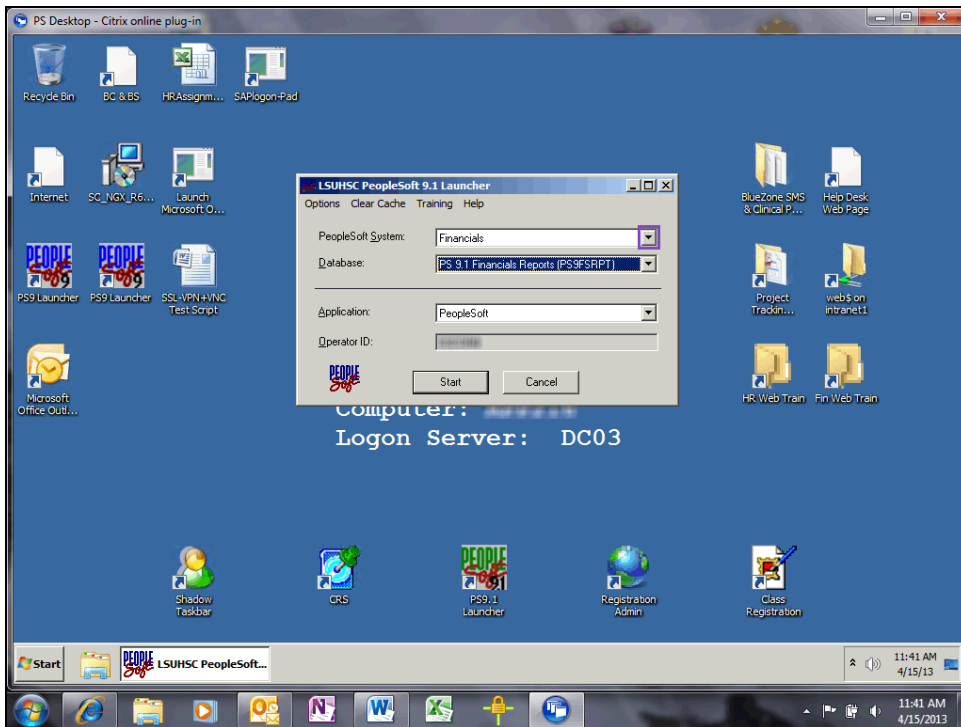
Step	Action
2.	Click the button to the right of the **PeopleSoft System** field.
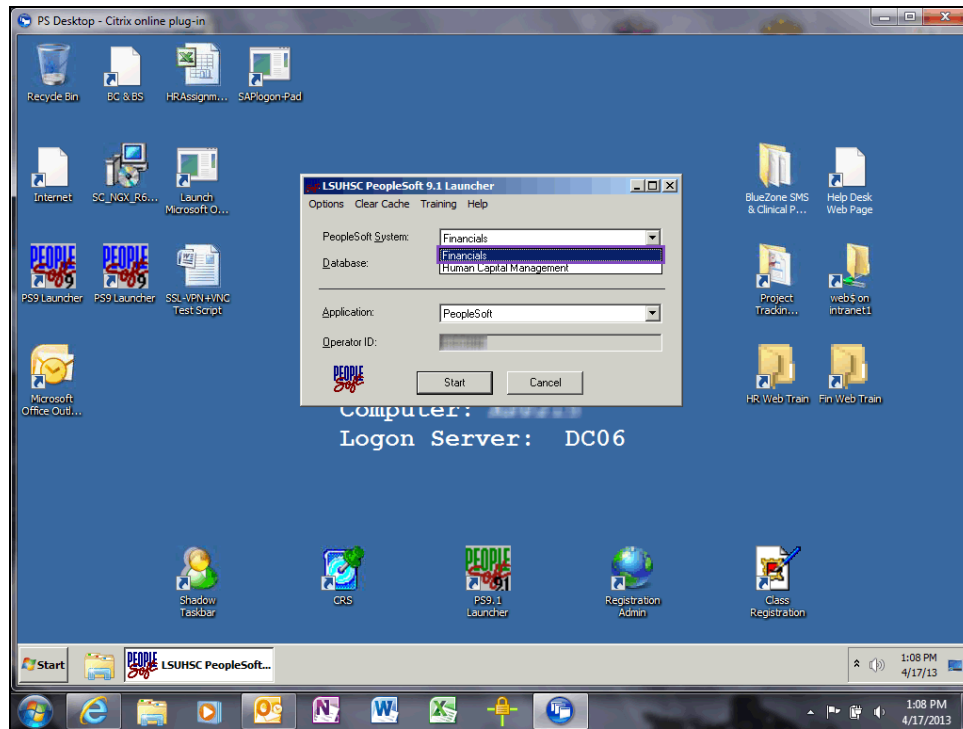
Step	Action
3.	Click the **Financials** list item.
4.	Click the button to the right of the **Database** field.
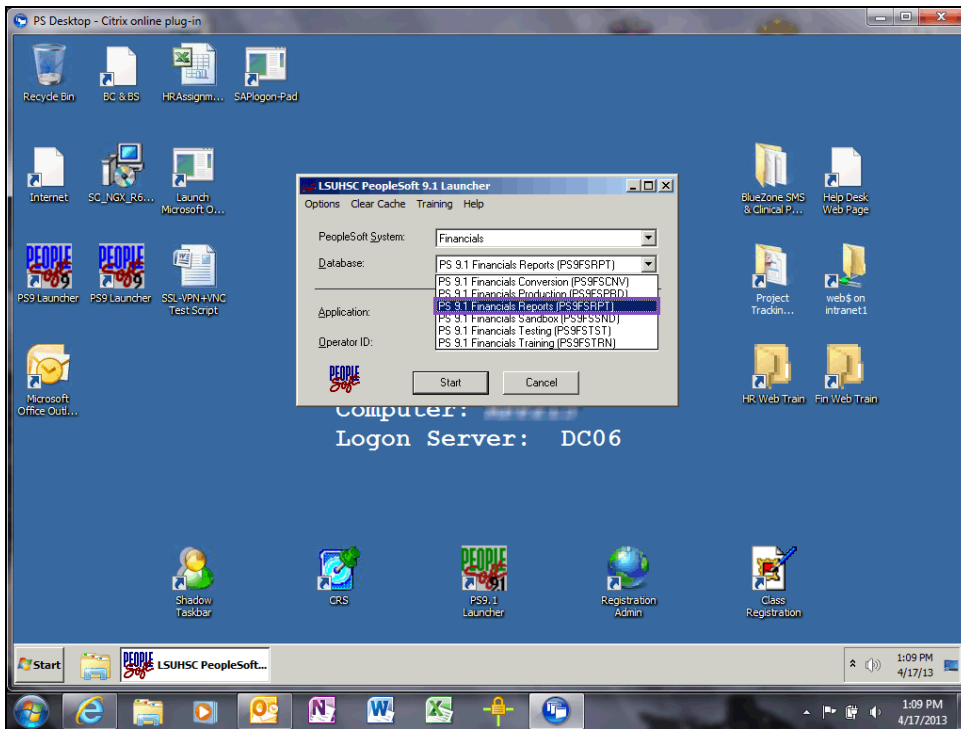
Step	Action
5.	Click the **PS 9.1 Financials Reports (PS9FSRPT)** list item. PS 9.1 Financials Reports (PS9FSRPT)
6.	Click the arrow to the right of the **Application** field. ▼
7.	Click the **Crystal Reports** list item. Crystal Reports
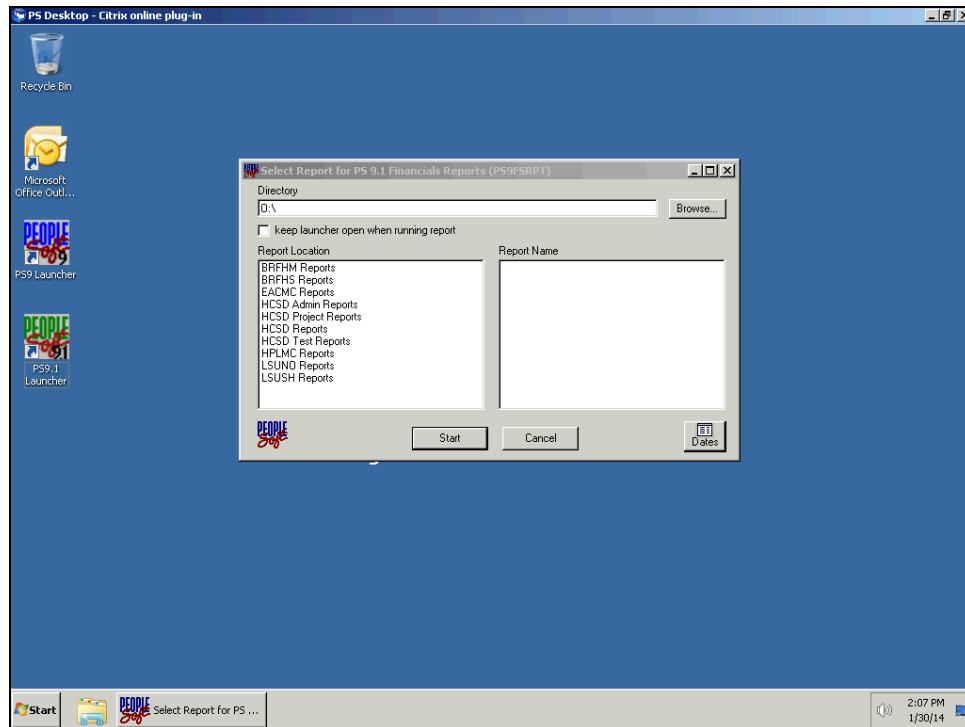
Step	Action
8.	The Launcher opens Crystal Reports and displays the Crystal Select Report window. The first time that you open Crystal, the Select Reports box may appear blank.

Step	Action
9.	The "**keep launcher open when running report**" check box will keep the launcher open thus allowing the users easy navigation from one report to another report without re-launching the Crystal Application. Place a check in the box that reads "keep launcher open when running report" to ensure this window remain open after selecting your report.

Step	Action
10.	Select your Business Unit under the Report Location field to populate a listing of report available for that location.
	Click the **BRFHS Reports** or **BRFHM Reports** list item.
	BRFHS Reports
11.	A list of available reports displays in the Report Name pane.
12.	This concludes the *Logon to Crystal Report via PS9.1 Launcher*.
	End of Procedure.

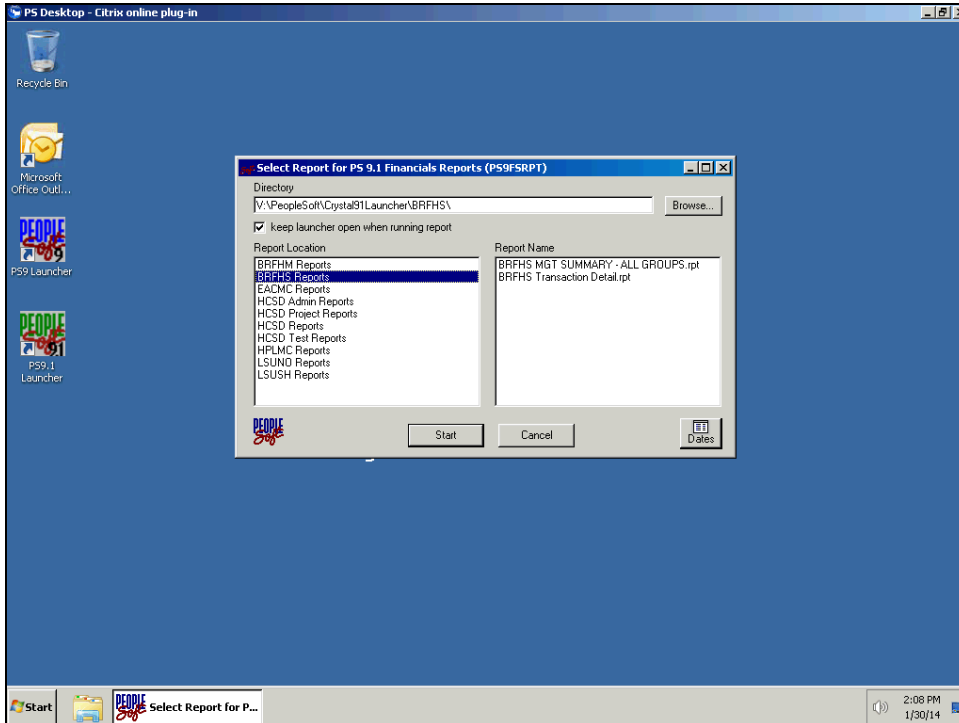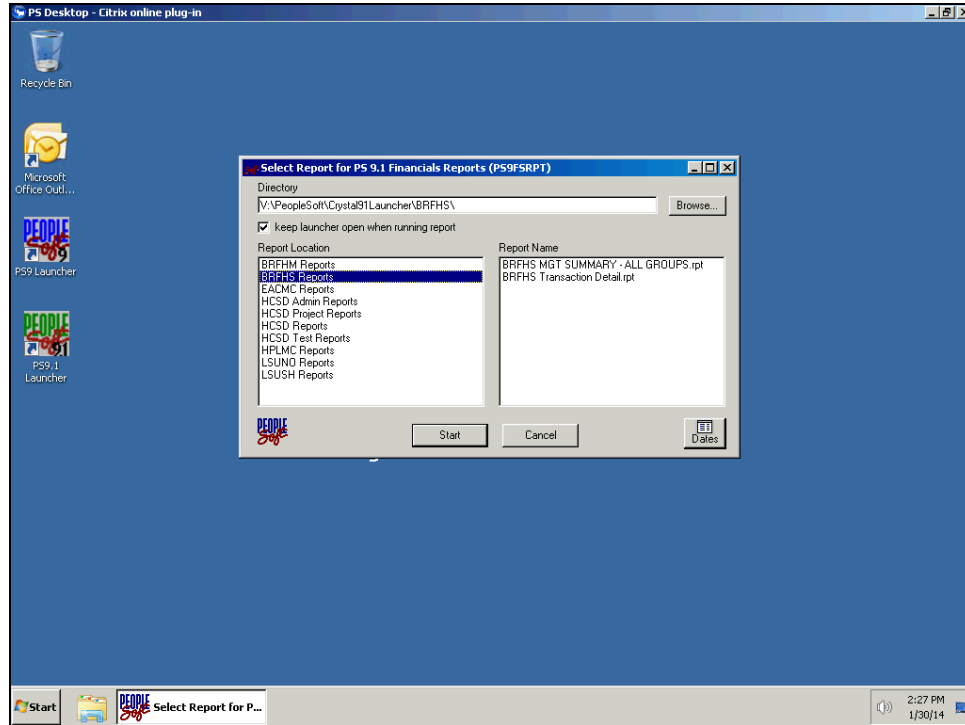## Running Crystal Reports

BRF Transaction Detail

Procedure

In this section you will learn how to run the **BRFHS/BRFHM Transaction Detail - Periods Report**.

Step	Action
1.	Click the **BRFHS Reports** or **BRFHM Reports** list item.
	BRFHS Reports
2.	Click the **BRFHS/BRFHM Transaction Detail.rpt** list item.
	BRFHS Transaction Detail.rpt
3.	Click the **Start** button.
	Start

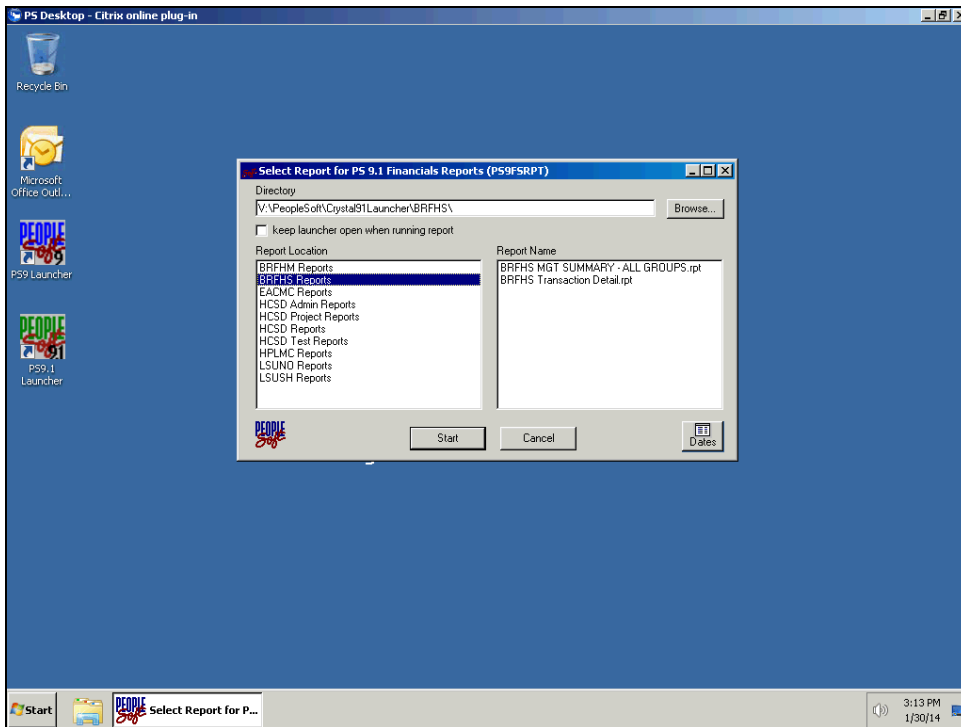| Step	Action
4.	The launch process may display a dialog box with a message that the report could not be opened for writing. Click the **OK** button. OK
5.	To run the report from the template, click the Refresh icon on the tool bar that looks like circular arrows or press F5. Click the **Refresh** button.
6.	**Enter the following Values:** **Department:** Enter the desired Dept ID or a partial entry, e.g. 2059050 **Fund Code:** Enter the fund code or wildcard, e.g. % **Program Code:** Enter the Program Code or wildcard, e.g.% **Class Field:** Enter the Class field or wildcard, e.g.% **Project:** Enter the Project number or the wildcard, e.g.%
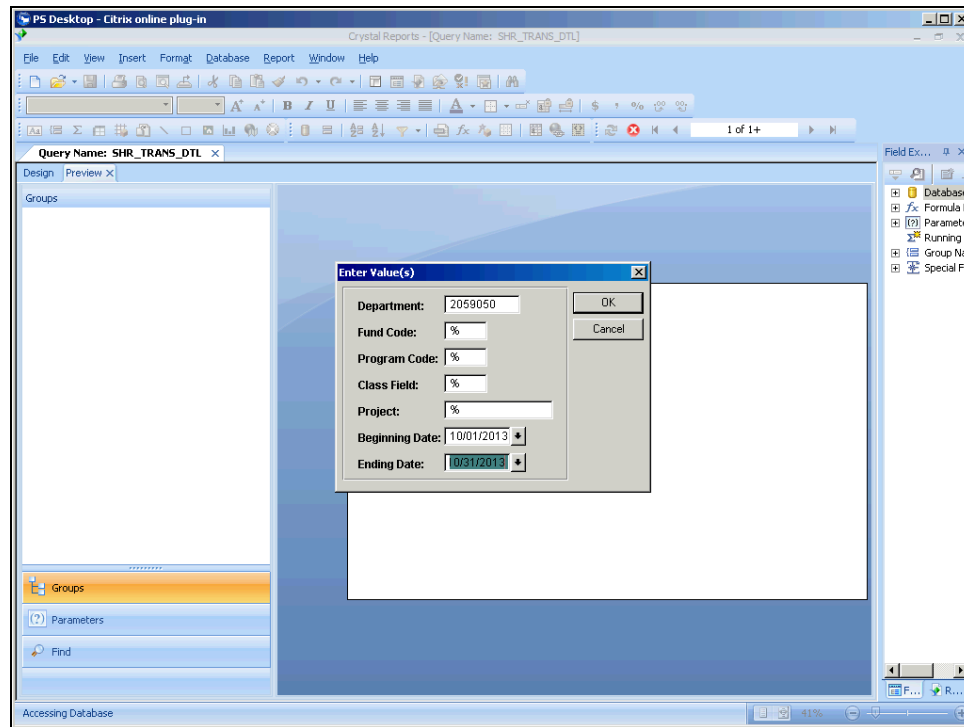
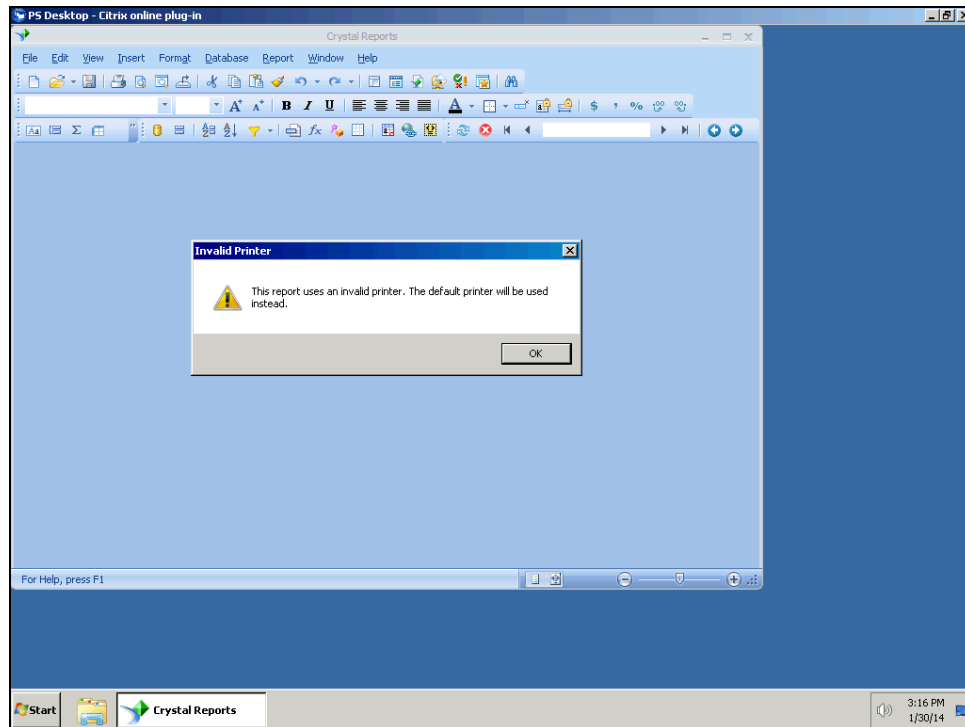| Step	Action
7.	**Enter the following Values** (cont.) **Beginning Date:** Enter the beginning date for which the report is run, e.g. 10/01/2013 **Ending Date:** Enter the ending date for which the report is run, e.g. 10/31/2013
8.	Click the **OK** button. OK
9.	This completes *BRFHS/BRFHM Transaction Detail.* **End of Procedure.**

BRF Summary ALL

Procedure

In this section you will learn how to run **BRFHS or BRFHM Summary All**.

Step	Action
1.	Click the **BRFHS Reports or BRFHM Reports** list item. BRFHS Reports
2.	Click the **BRFHS/BRFHM MGT SUMMARY - ALL GROUPS.rpt** list item. BRFHS MGT SUMMARY - ALL GROUPS.rpt
3.	Click the **Start** button. Start

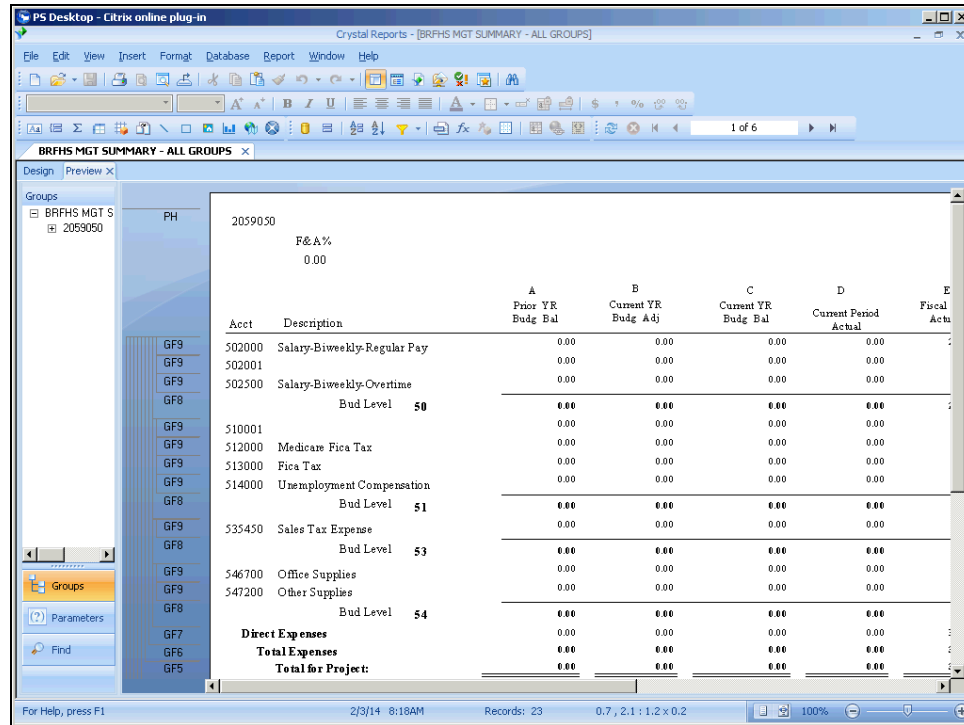| Step	Action
4.	A Dialog box may display with the following message: "The report uses and invalid printer. The default printer will be used instead." Click the **OK** button. OK
5.	The launch process may display dialog box with a message that the report could not be opened for writing. Click the **OK** button. OK
6.	To run the report from the template, click the Refresh icon on the tool bar that looks like circular arrows or press F5. Click the **Refresh** button.

Step	Action
7.	**Enter the following:** **Department:** Enter the desired Dept ID or a partial entry, e.g. 2059050 **Fund Code:** Enter the fund code or wildcard, e.g. % **Program Code:** Enter the Program Code or wildcard, e.g.% **Class Field:** Enter the Class field or wildcard, e.g.% **Project Id:** Enter the Project number or the wildcard, e.g.% **As of Accounting Period:** Enter the period for which the report is run, e.g. 10 **Fiscal Year:** Enter the Fiscal Year, e.g. 2014
8.	Click the **OK** button. OK
9.	This completes *BRFHS or BRFHM Summary All*. **End of Procedure.**

Run a Single Report for Multiple Departments

Procedure

In this topic you will learn how to **Run a Single Report for Multiple Departments**.

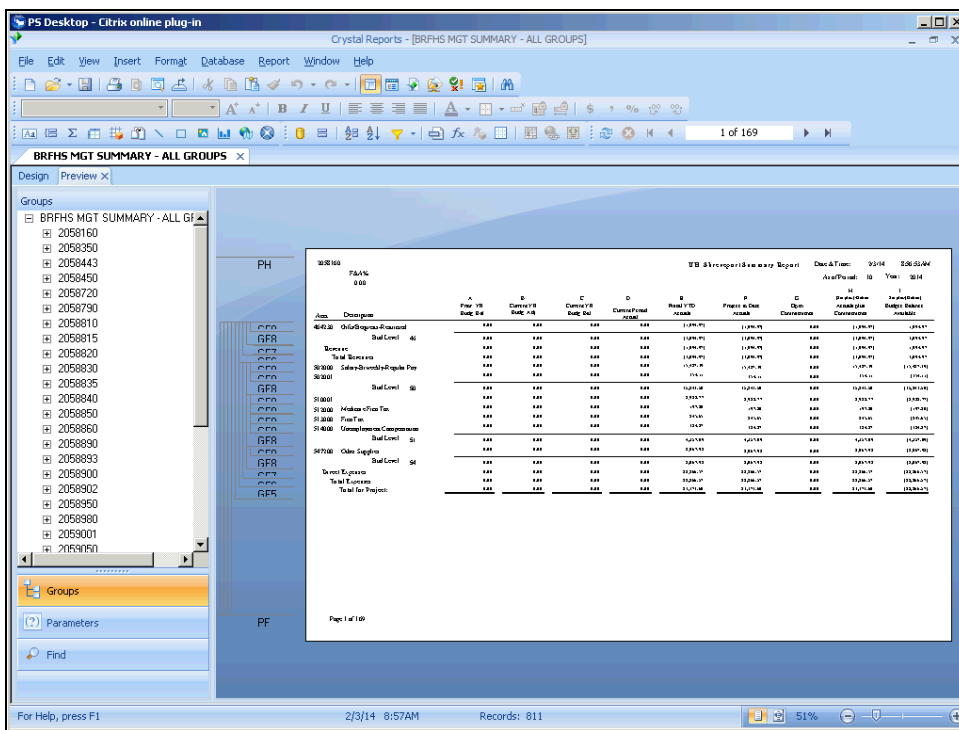| Step	Action
1.	*NOTE: From the previous exercise, the University Health Summary Report is open on the desktop. This report was previously run for department number "2059050". In this exercise, you also need to run this report for department "2059157".* To run this report for the next department, click the **Refresh** button.
2.	Click the **OK** button.
3.	**Enter the following:** **Department:** Enter the desired Dept ID or a partial entry, e.g. 2059157 **Fund Code:** Enter the fund code or wildcard, e.g. % **Program Code:** Enter the Program Code or wildcard, e.g.% **Class Field:** Enter the Class field or wildcard, e.g.% **Project Id:** Enter the Project number or the wildcard, e.g.% **As of Accounting Period:** Enter the period for which the report is run, e.g. 10 **Fiscal Year:** Enter the Fiscal Year, e.g. 2014
4.	Click the **OK** button.
5.	Notice the report is refreshed with the new department data. Repeat these steps for each department needing this report.

Step	Action
6.	*This completes **Run a Single Report for Multiple Departments***. **End of Procedure.**

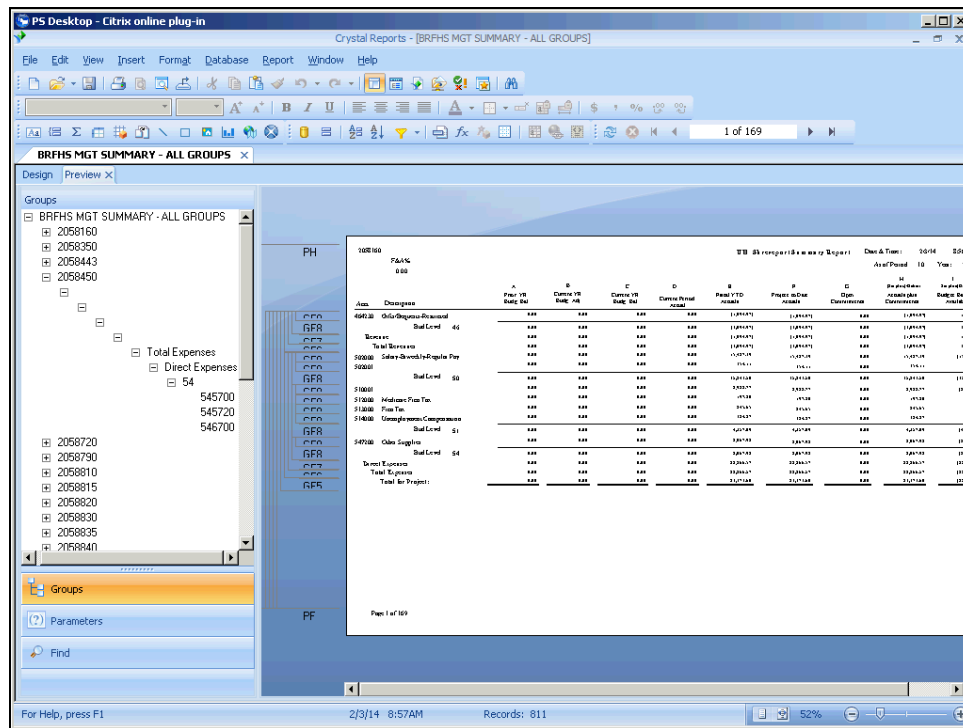## Crystal Report Viewing Options

Crystal Report Viewing Options

Procedure

In this topic you will explore **Crystal Reports Viewing Options**.

Step	Action
1.	The Preview window is composed a hierarchical listing of the items on the left side of the screen and the detailed report displays on the right. Click the **Expand** button in the **Preview** section.

Step	Action
2.	Each section contains scroll bars to navigate through the item lists.
	The hierarchical view may be used to select a particular section for review. The + in front of each line item indicates there are additional components to the hierarchy to view. Continue to click on the + until the desired section is obtained. There will be four + that will be blank, this is due to the funds, programs, classes, and projects no longer being used for University Health.
	Once the desired code is located, click on it to select it for review.
	Click the **Expand** button for **Total Expenses/Direct Expenses**.
3.	Click the **Expand** button for **54**.

Step	Action
4.	Click the **545700** list item.

University Health™
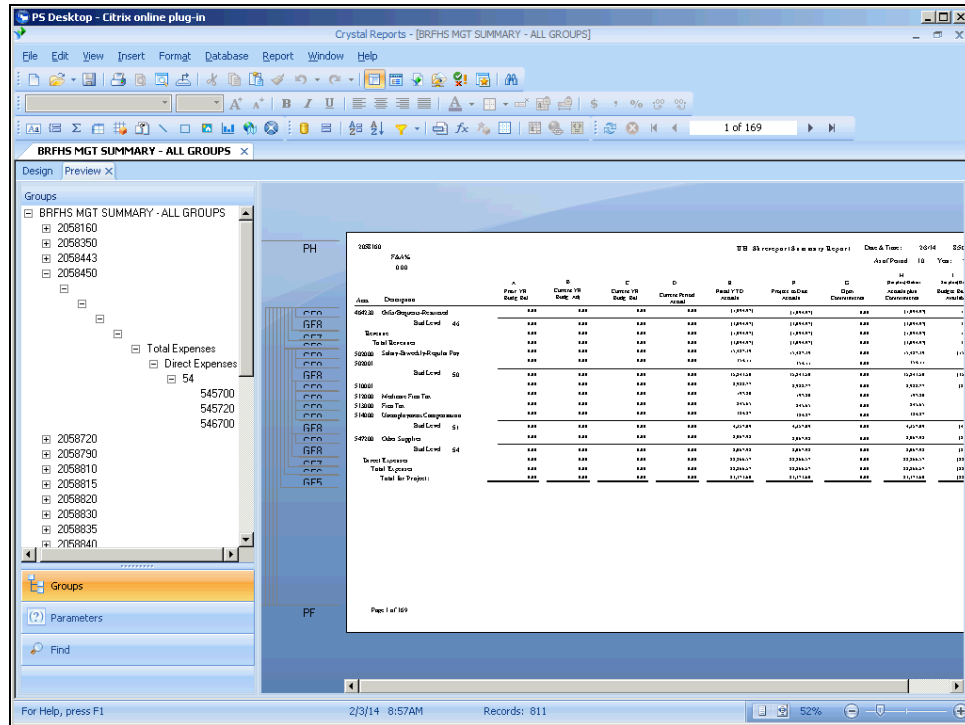Shreveport
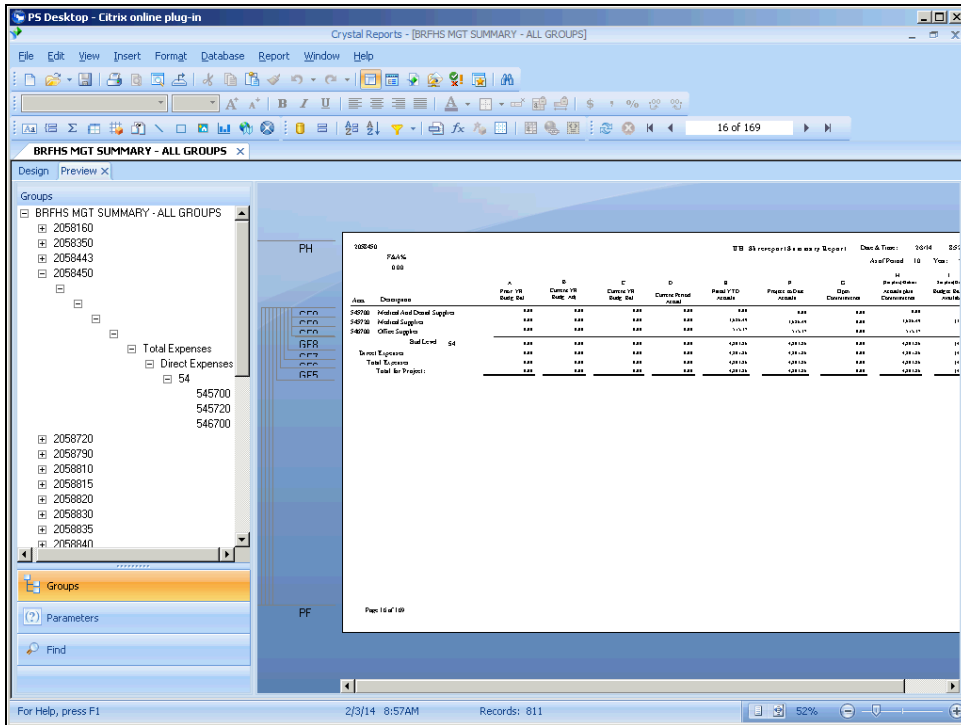
Step	Action
5.	The page containing the selected data will display in the preview section of the report. Click the **Show Next Page** button to go to the next page. ▶
6.	Click the **Show Last Page** button to go to the last page of the report. ▶|
7.	Click the **Show Previous Page** button view the previous page. ◀
8.	Click the **Show First Page** button to return to the first page . |◀
9.	Click the **Plus** button on the Zoom toolbar in the bottom right corner of the screen to increase the report font and display size. ⊕
10.	Click the **Minus** button on the Zoom toolbar in the bottom right corner of the screen to decrease the report font and display size. ⊖
11.	This completes *Crystal Report Viewing Options*. **End of Procedure.**

Exporting and Saving Options

Export to PDF

Procedure

In this topic we will learn how to **Export Report to a PDF File**.
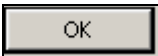
Step	Action
1.	Click the **Export** button.
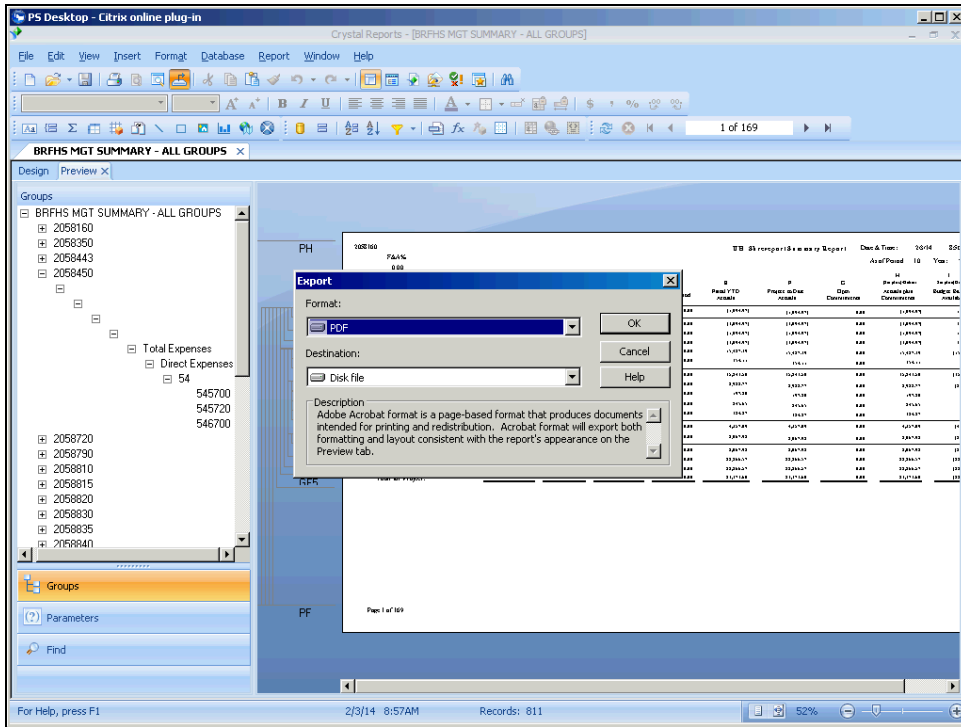
Step	Action
2.	The default Export Options are PDF format and Disk File Destination. Click the **OK** button. OK
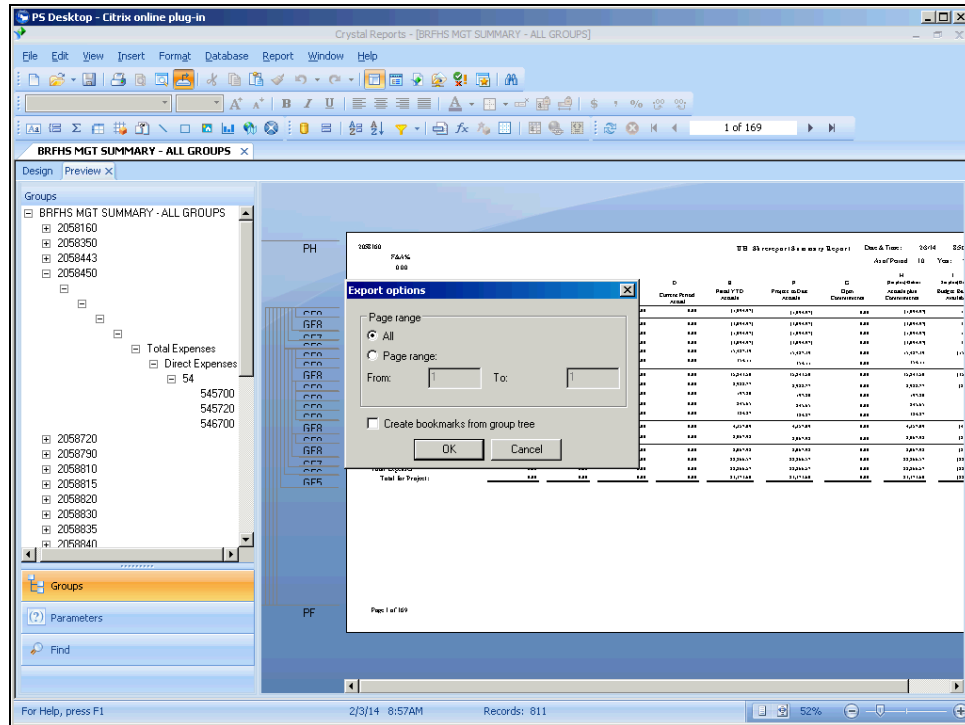
Step	Action
3.	Click the **OK** button on the Export Options window.
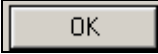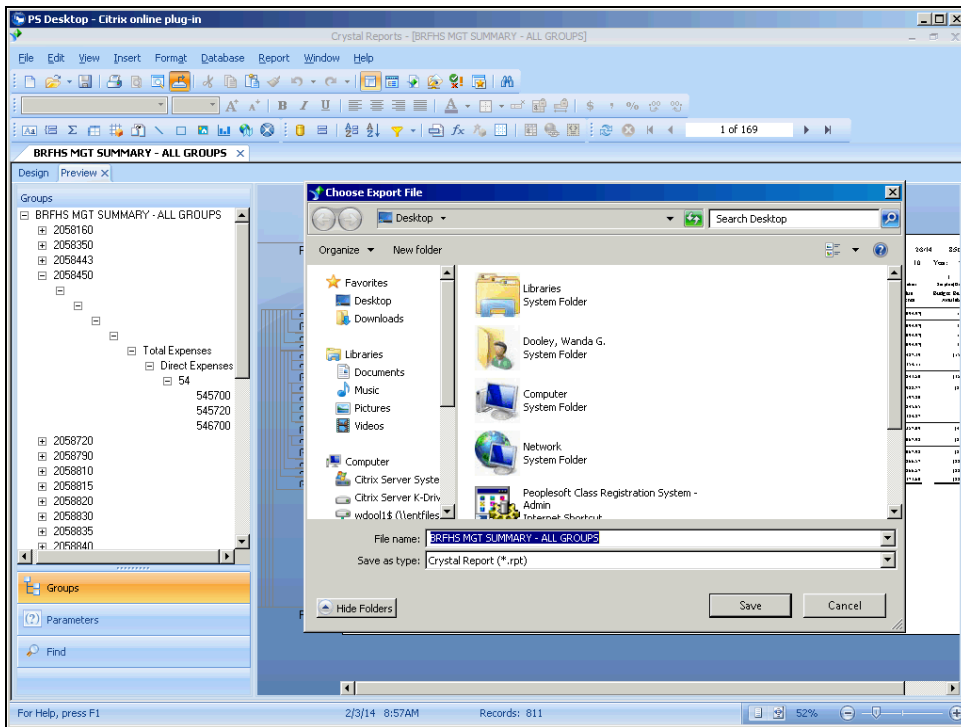
Step	Action
4.	Click the **Up** button of the scrollbar to locate Desktop. Desktop will be on the left of the dialog box.
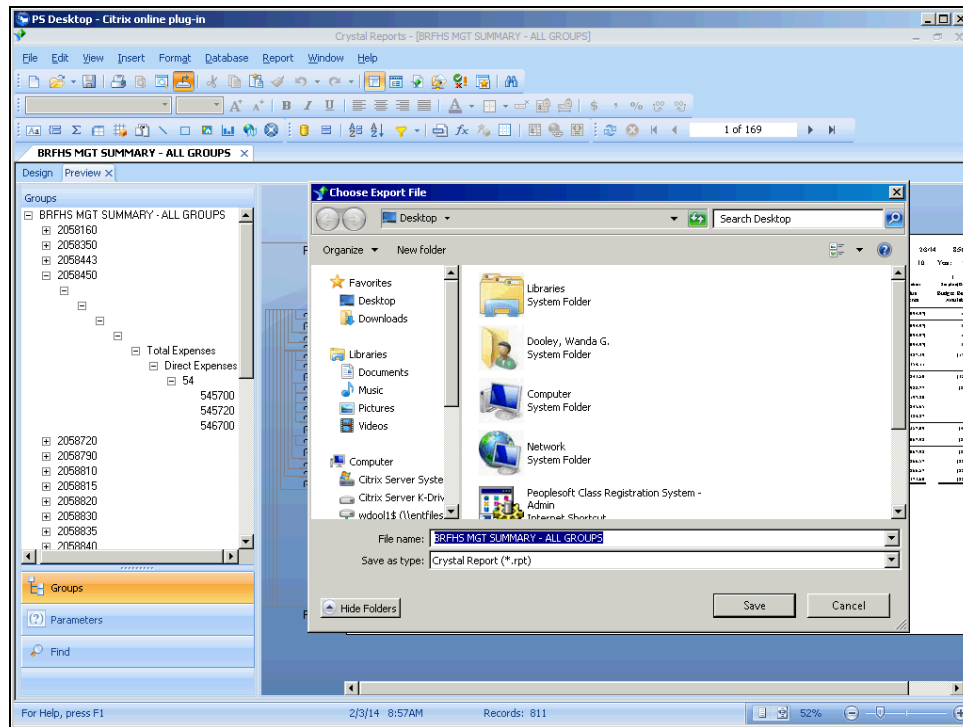
Step	Action
5.	Click the **Desktop** button.
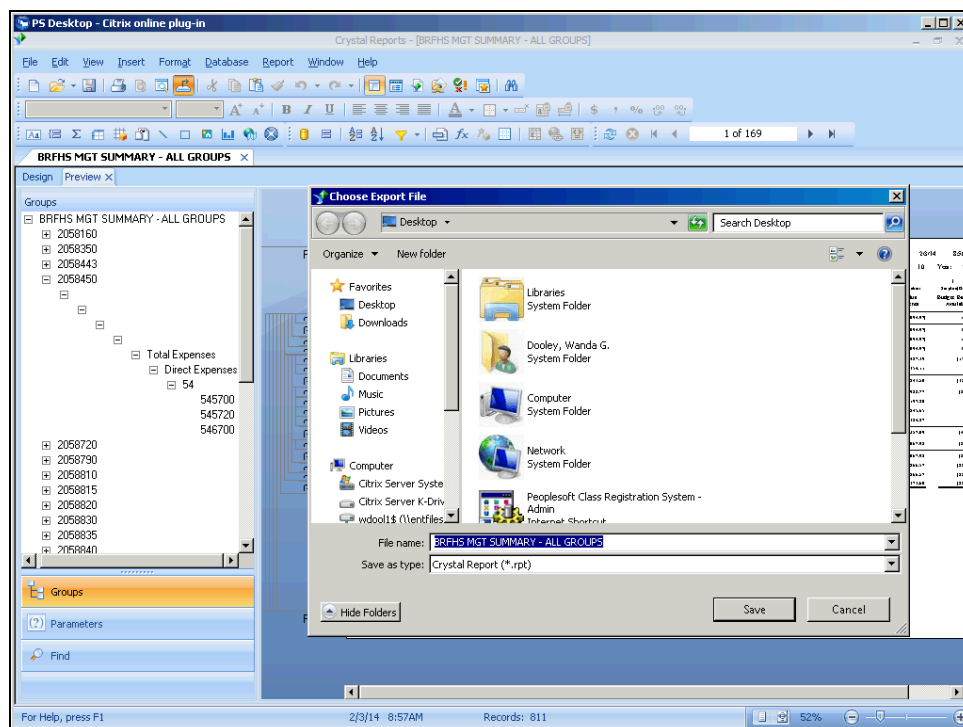
Step	Action
6.	*NOTE: Make sure the Save as type: is set to the PDF option.* Click the **Save** button. Save
7.	This completes *Export Report to a PDF File*. **End of Procedure.**

Export Report to an Excel File.

Procedure

In this topic you will learn how to **Export Report to an Excel File**.

Step	Action
1.	Click the **Export** button.

Step	Action
2.	Click the **OK** button.

Step	Action
3.	Click the **OK** button.
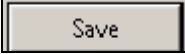
Step	Action
4.	Click the **Up** button of the scrollbar to locate Desktop on the left side of the dialog box.

Step	Action
5.	Click the **Desktop** list item.
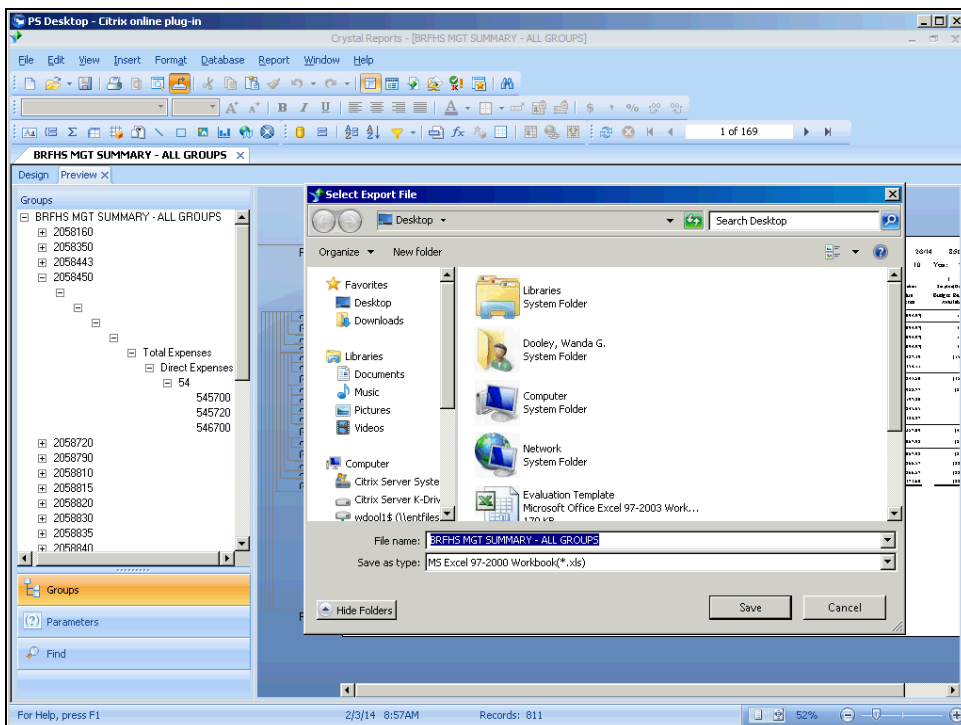
Step	Action
6.	*NOTE: Make sure the Save as type: is set to Excel.* Click the **Save** button. [Save button]
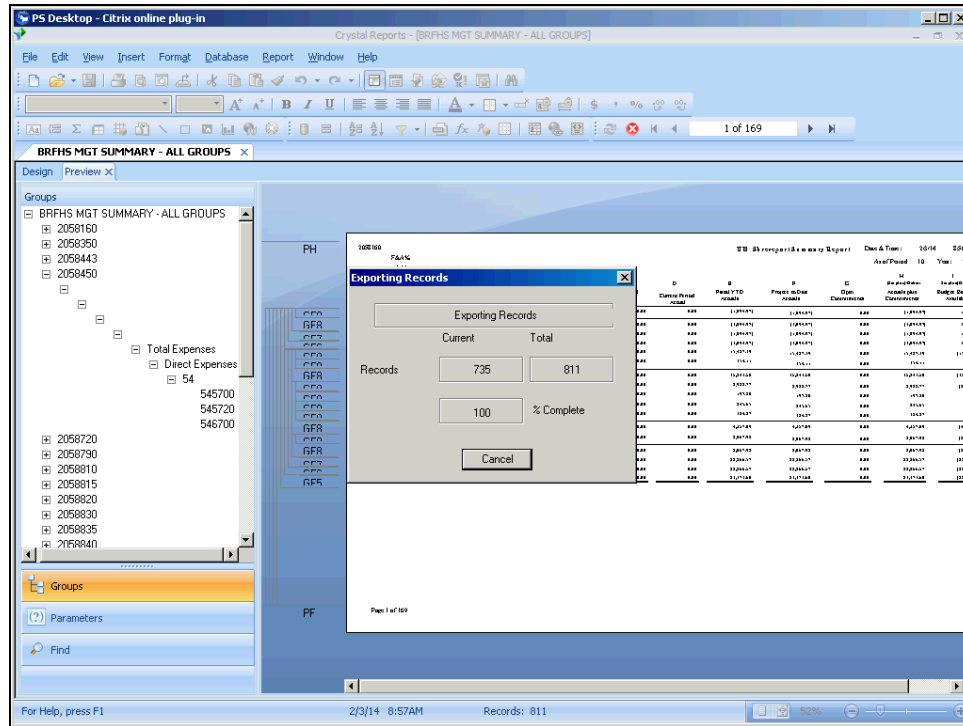
Step	Action
7.	This completes *Export Report to an Excel File*. **End of Procedure.**

Saving to Local Hard Drive

Procedure

In this topic you learn how to **Save a Report to a Local Hard Drive**.

Step	Action
1.	Click the **Export** button.

Step	Action
2.	Click the **OK** button.

Step	Action
3.	Click the **OK** button.

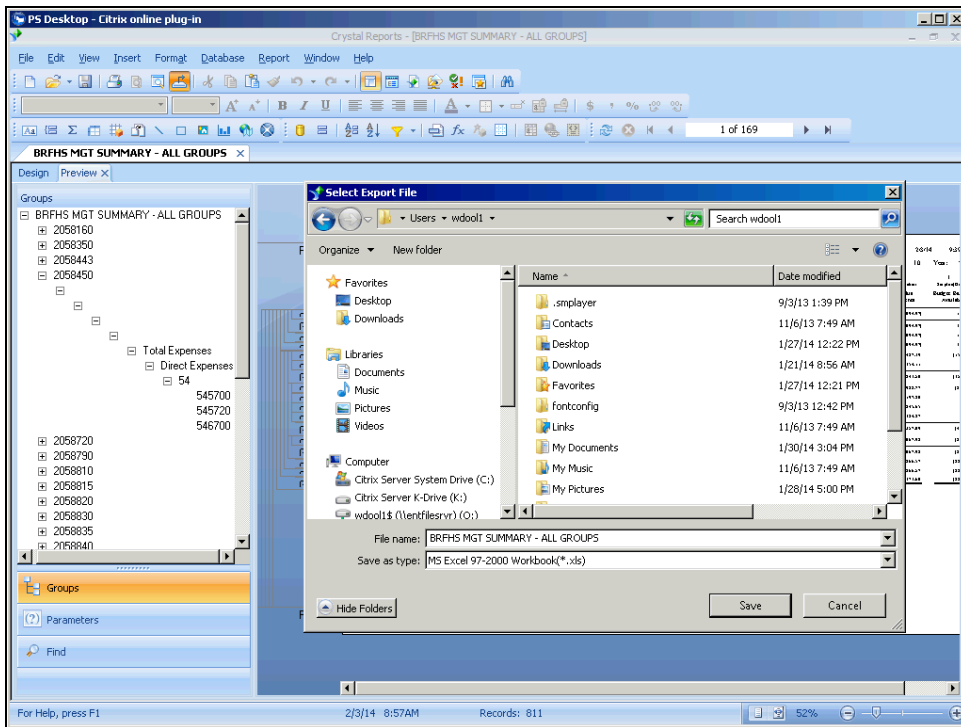| Step	Action
4.	Click the **Down** button of the scrollbar to locate "**Local Disk (C:)**.
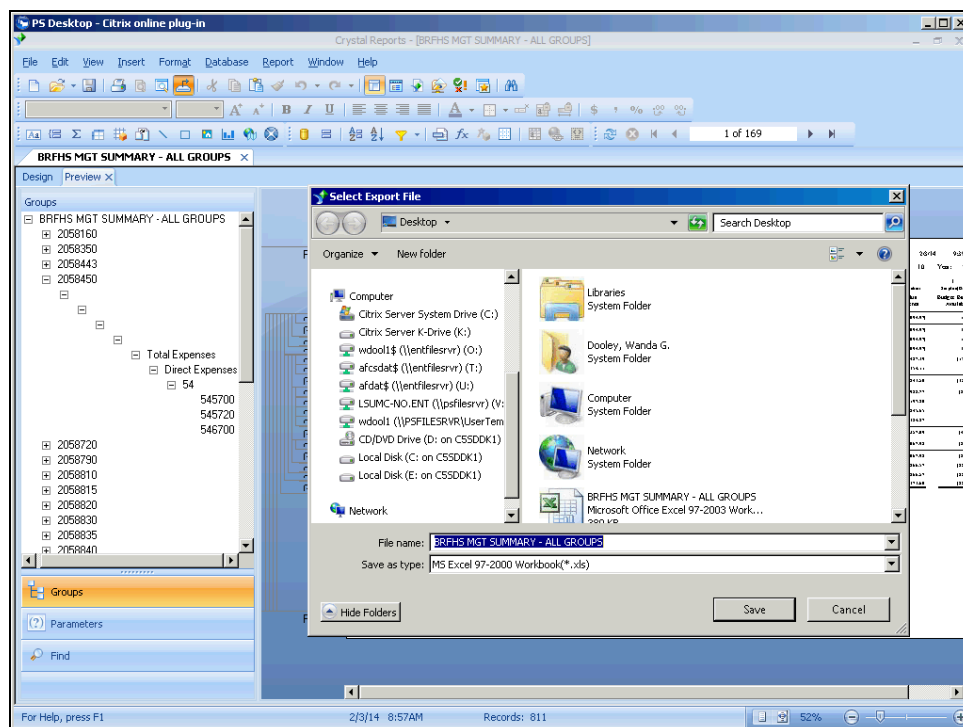
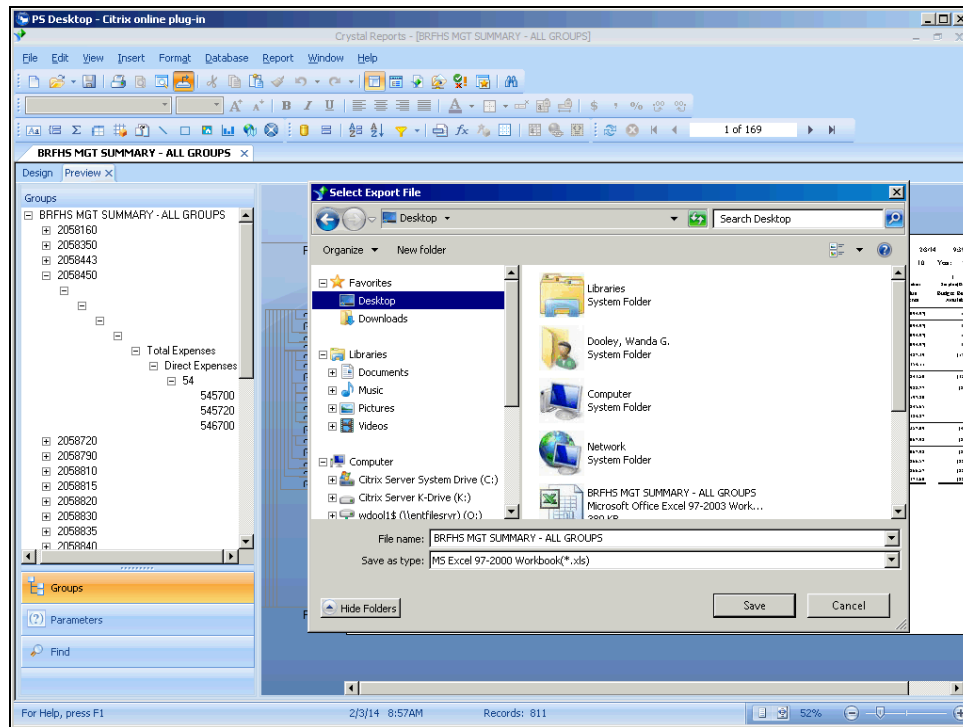| Step	Action
5.	Please note there are two C:\ drives available. Make sure you are selecting the drive that begins with "Local Disk". Click the **Local Disk (C:)** button. Local Disk (C: on C5SDDK1)
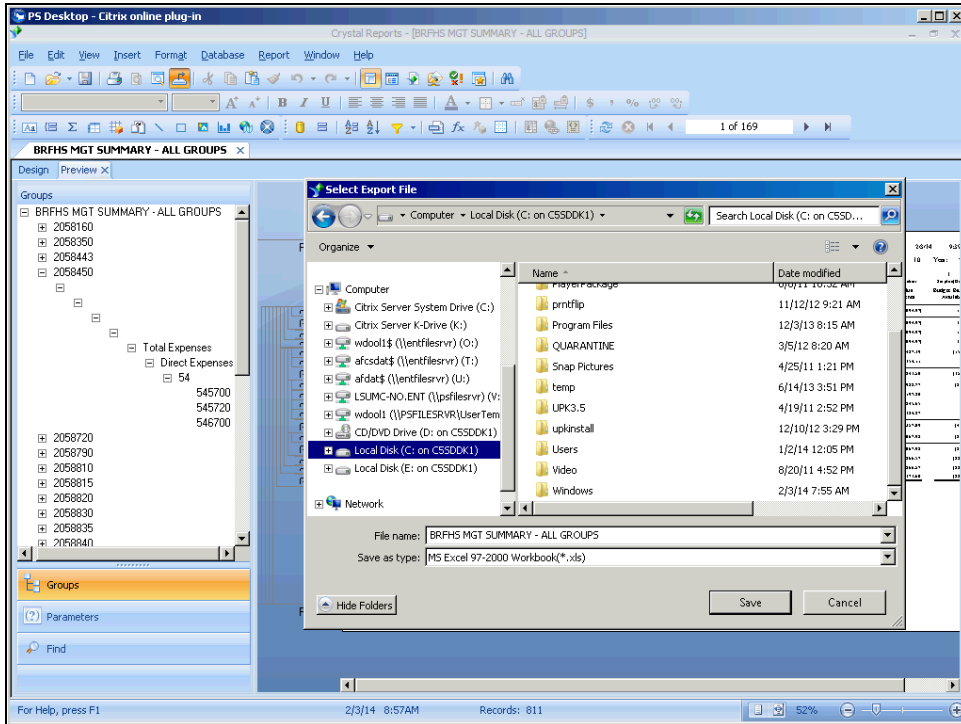
Step	Action
6.	On the right-side of the dialog box locate the folder entitles "Users". Double-click the **Users** list item. Users
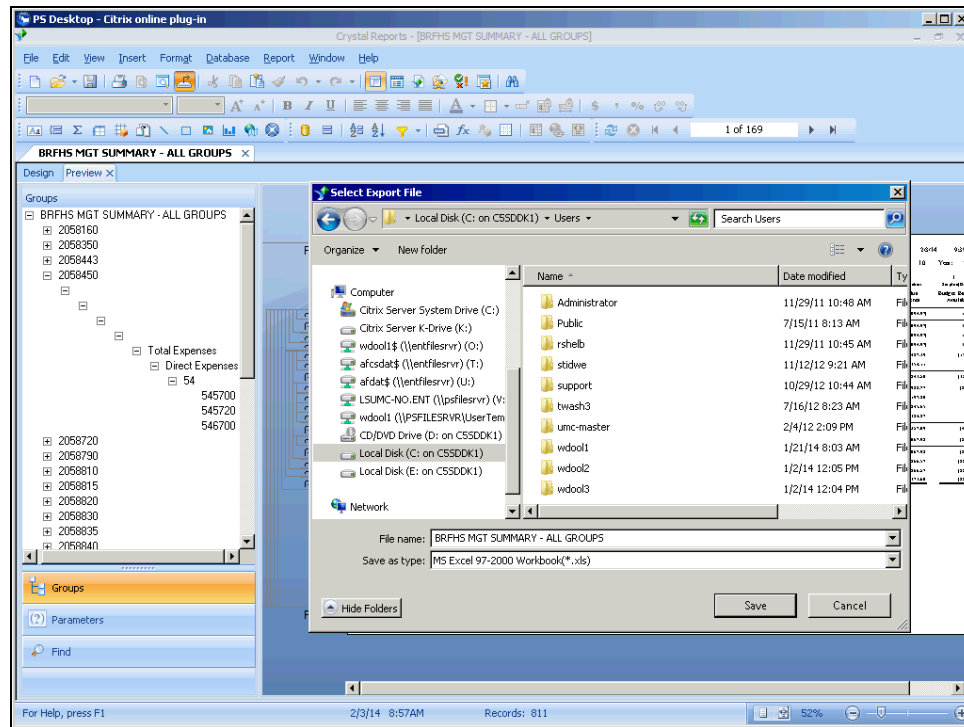
Step	Action
7.	Locate the folder with "Your User Name" next to it. Double-click the **username folder** list item. 📁 wdool1

Step	Action
8.	Double-click the **Desktop** list item.

Step	Action
9.	Click the **Save** button.
10.	This completes *Save a Report to the Local Hard Drive*. **End of Procedure.**