

Module	Running Reports
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9.1.4 Running & Viewing Crystal Reports

Prerequisite: None

Concept:

The purpose of this topic is to demonstrate the basic procedures used to generate a Crystal report and print it from your desktop.

A variety of HCM reports are available for end-users. The Workforce Administration, Benefits, and Payroll for North America modules each contain a Lesson in the UPK with a link to the module's Reports Manual. The manual provides a listing of all available reports and queries, navigation paths, and run control parameters. In addition, samples of each report and query are included.

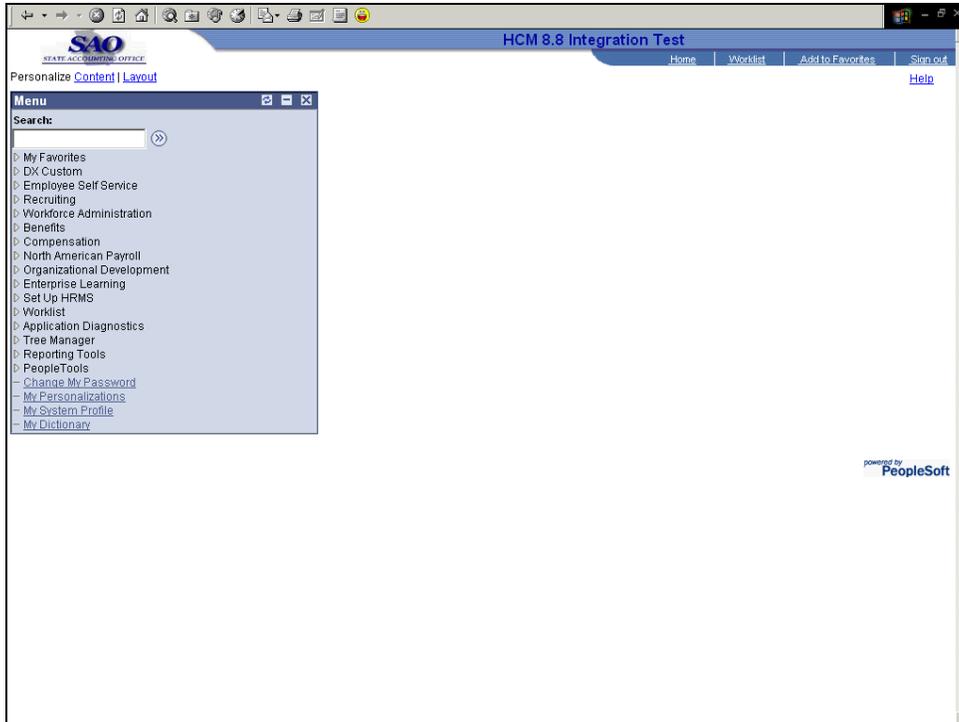
These reports and queries retrieve data to aid agencies with data validation, reconciliation, and preparation of other reports. Some reports will allow end-users to run reports so that they may be viewed immediately and printed at their local printer. Other reports will continue to be printed through Document Direct. Queries can be viewed online or run to an Excel spreadsheet.

Procedure

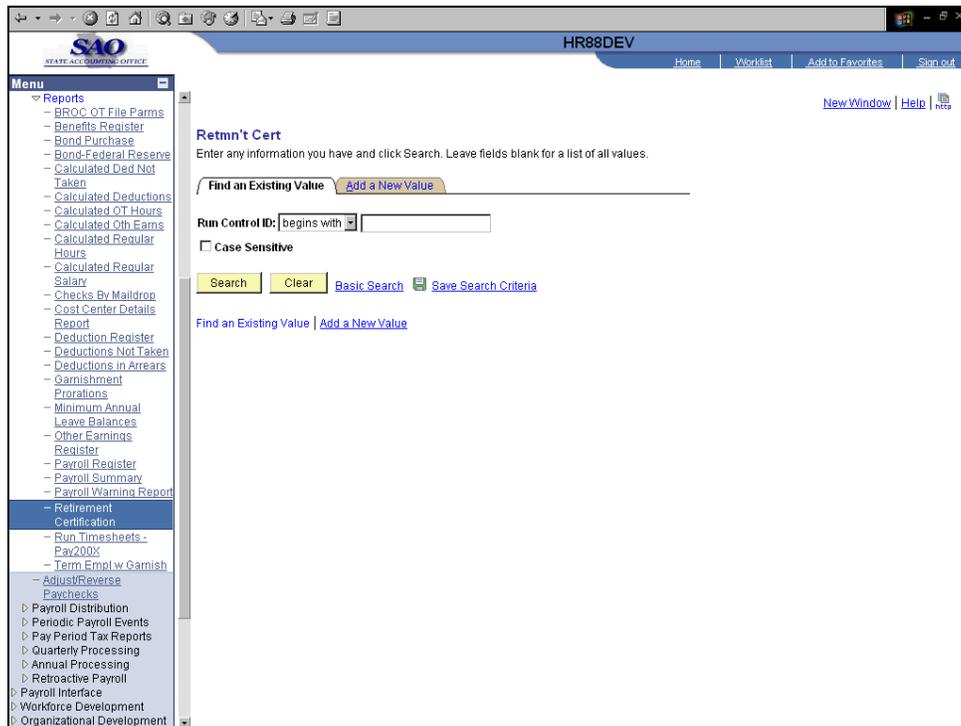
Scenario:

In this topic, you will run a Crystal Report to your desktop for **Retirement Certification** for employee Tom Avalon, Empl ID 99212022.

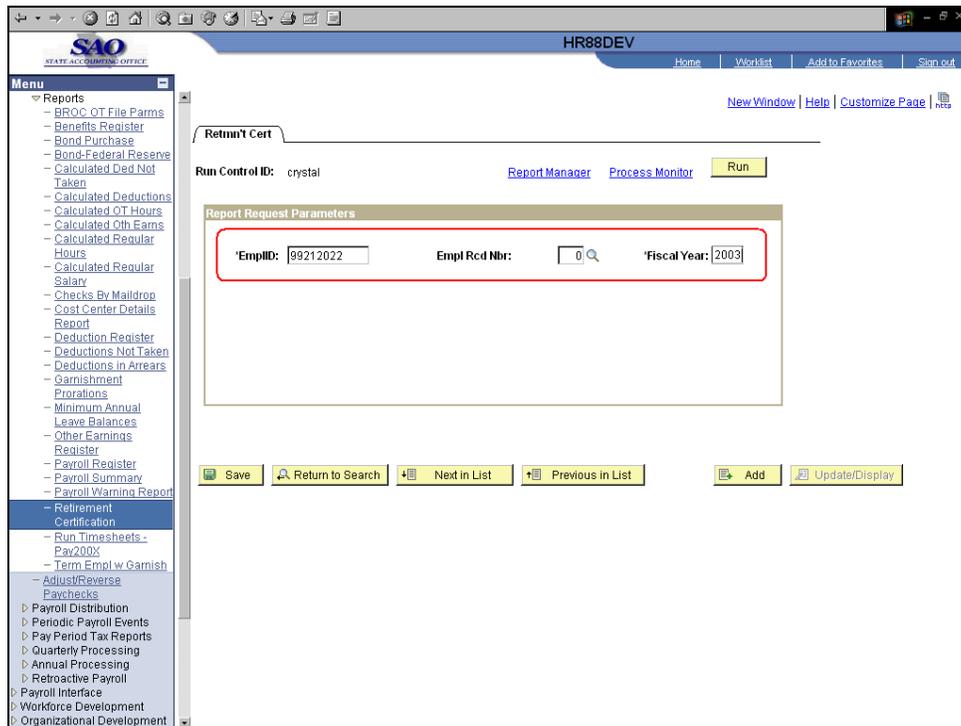
Note: The following instructions contain sample data. Always use your own data as your follow these instructions.



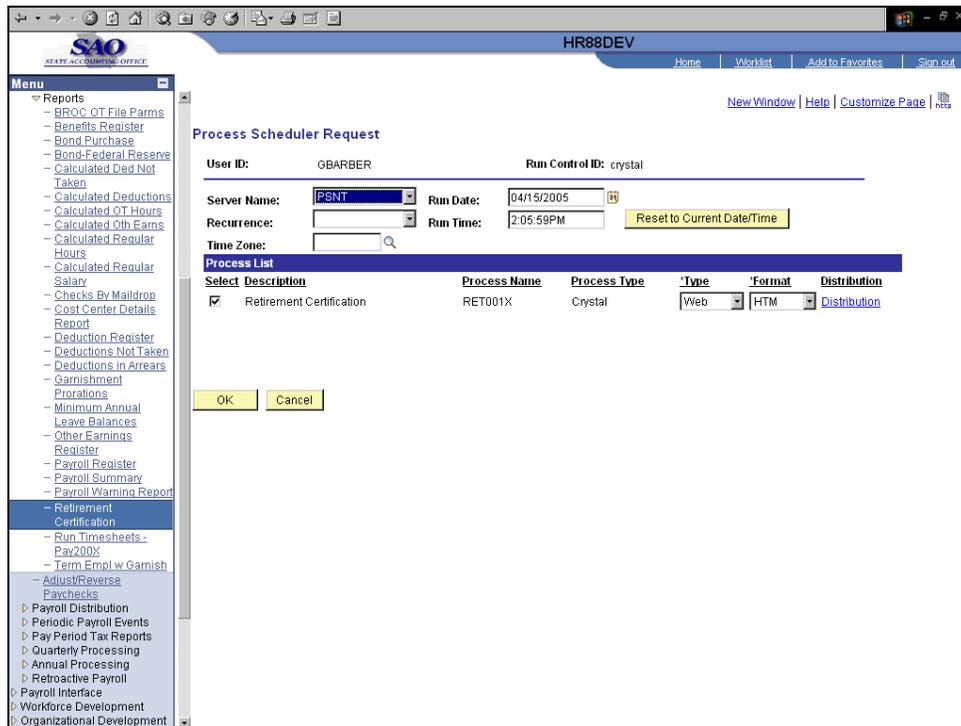
Step	Action
1.	Click the North American Payroll link. <input type="text" value="North American Payroll"/>
2.	Click the Payroll Processing link. <input type="text" value="Payroll Processing"/>
3.	Click the Reports link. <input type="text" value="Reports"/>
4.	Click the Retirement Certification link. <input type="text" value="Retirement Certification"/>



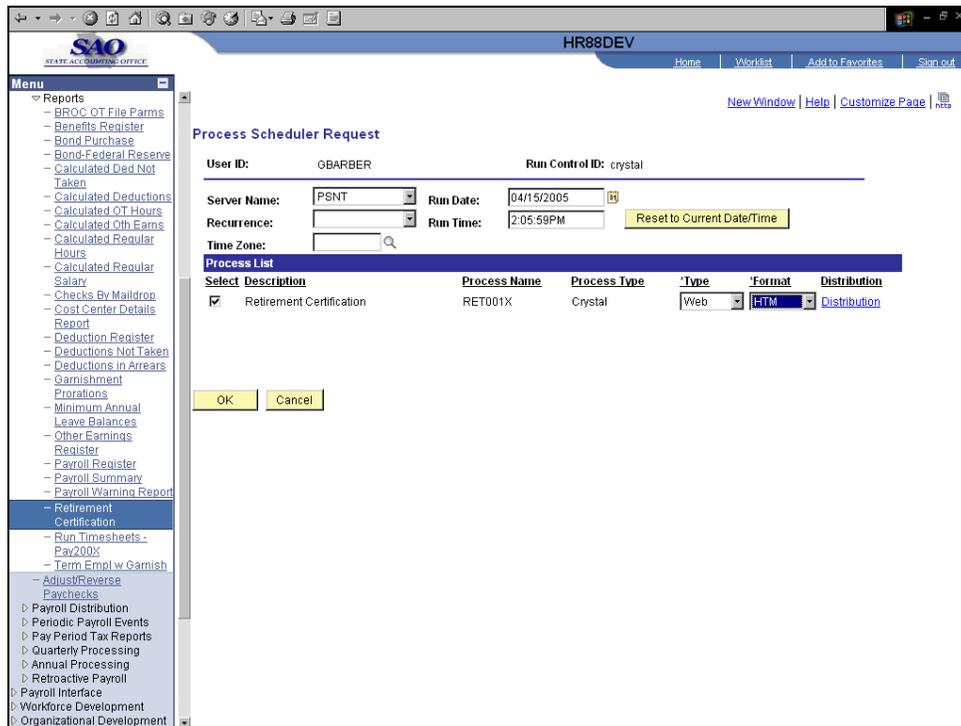
Step	Action
5.	<p>Use the report search page to find an existing Run Control ID or to add a new Run Control ID. By creating your own Run Control ID, you will be able to save it and all assigned parameters so that you can easily access it again in the future. Run Control Ids cannot contain any blank spaces.</p> <p>Press [Tab] to continue.</p>



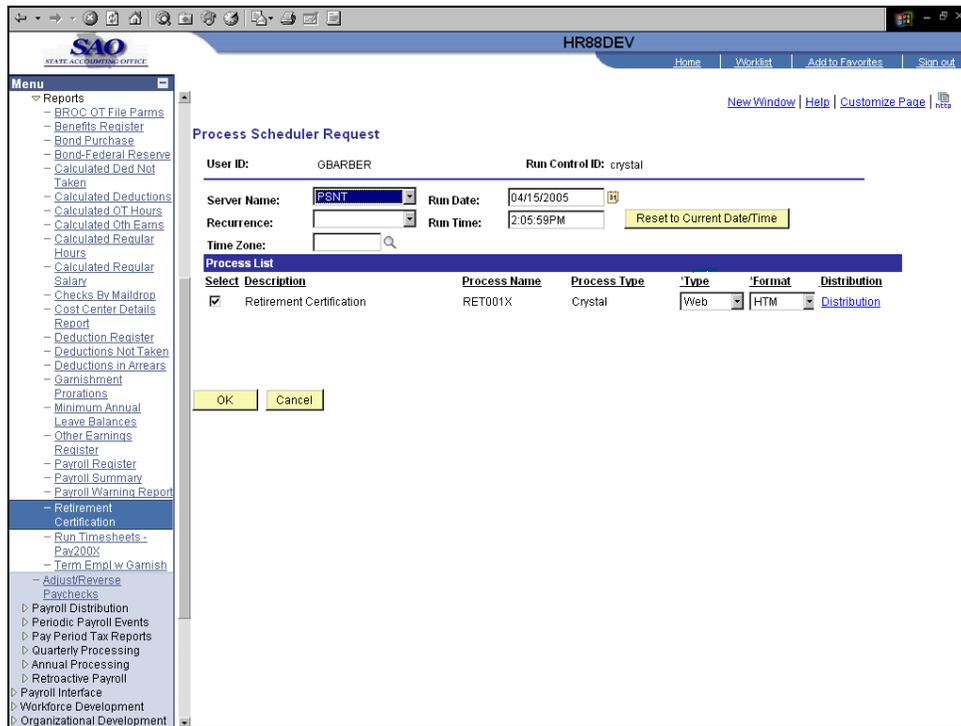
Step	Action
6.	<p>Enter information in the fields to define the parameters that will be used when the report is run. In this report, the EmplID, Empl Rcd Nbr, and Fiscal Year field values determine the output of the report. Required fields are indicated by an asterisks (*) by the field name.</p> <p>Press [Tab] to continue.</p>
7.	<p>Once the parameters have been set for the report, the report is ready to run.</p> <p>Click the Run button.</p> <div style="text-align: center;">  </div>



Step	Action
8.	<p>Use the Process Scheduler Request page to enter, update or view parameters, such as server name and process output format.</p> <p>Click the Server Name drop down list box to view available servers.</p> 
9.	<p>The Server Name you choose determines the server on which the process will run. You must choose a Server Name. For this example, we will use PSNT to run Crystal Reports.</p> <p>Select PSNT from the list.</p> 



Step	Action
10.	The Description field helps to uniquely identify a process. Press [Tab] to continue.
11.	The Process Name field displays the name of the process as it appears in the definition. Press [Tab] to continue.
12.	The Process Type field displays the type of process, such as SQR, Crystal, and so on. Press [Tab] to continue.
13.	Use the Type field to select the type of output you want to generate for this job. Your three choices are File, Printer, or Web. File: This enables you to write the output to a file that will appear in the Output Destination. (Document Direct) Printer: This option is not viable for the SOG PeopleSoft system. Do not select. Web: Sends all output of the process to the report repository, including log and trace files. (Local Printer) Press [Tab] to continue.

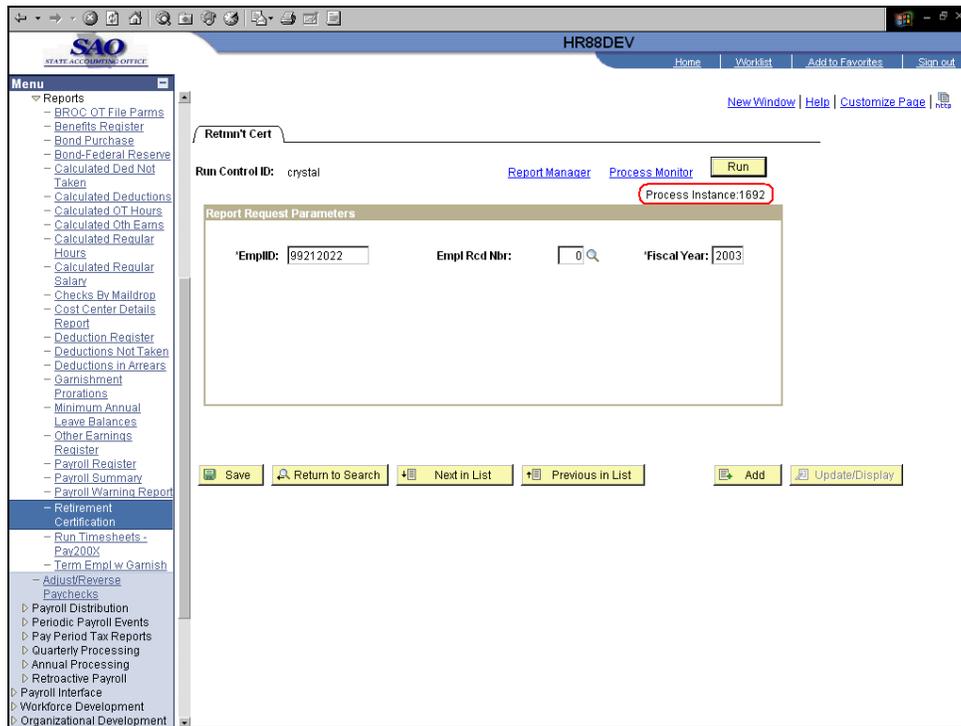


Step	Action
14.	<p>Crystal Reports use the Type field to determine what type of output to generate. For HCM Crystal Reports, use " Web".</p> <p>Use the Format field to define the output format for the report. The values are dependent upon the Process Type you have chosen.</p> <p>Click the *Format drop-down arrow to display the list.</p> 
15.	<p>The format used for Crystal Reports is either HTM or PDF, depending on which format you want your file saved. For this example, we will use HTM.</p> <p>Select HTM from the list.</p> 
16.	<p>Click the OK button to begin the Run process using the Process Scheduler.</p> 

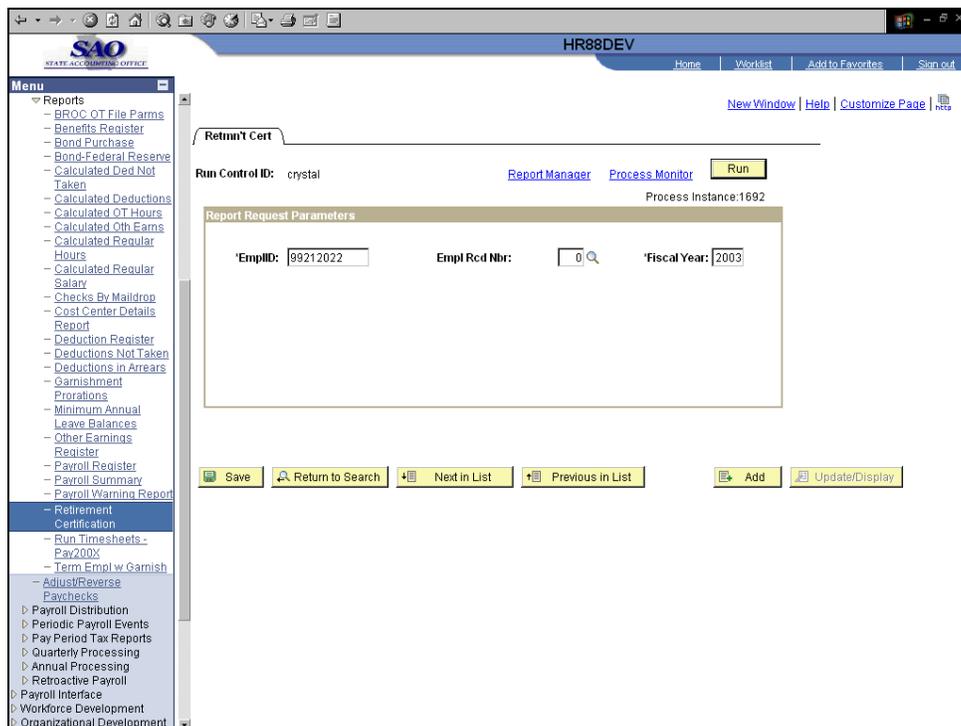
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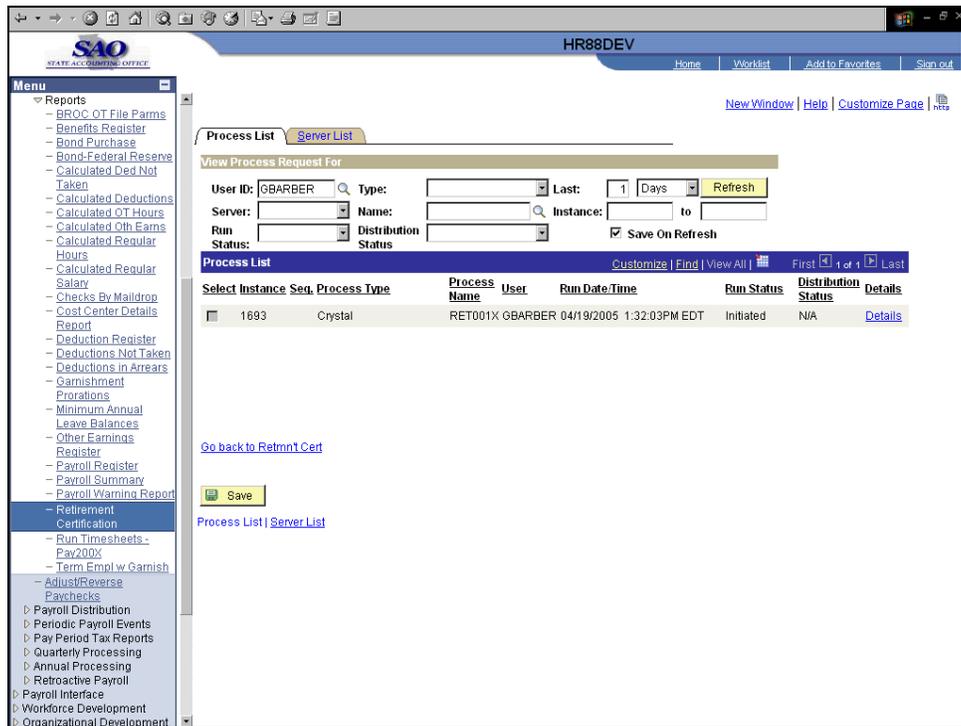
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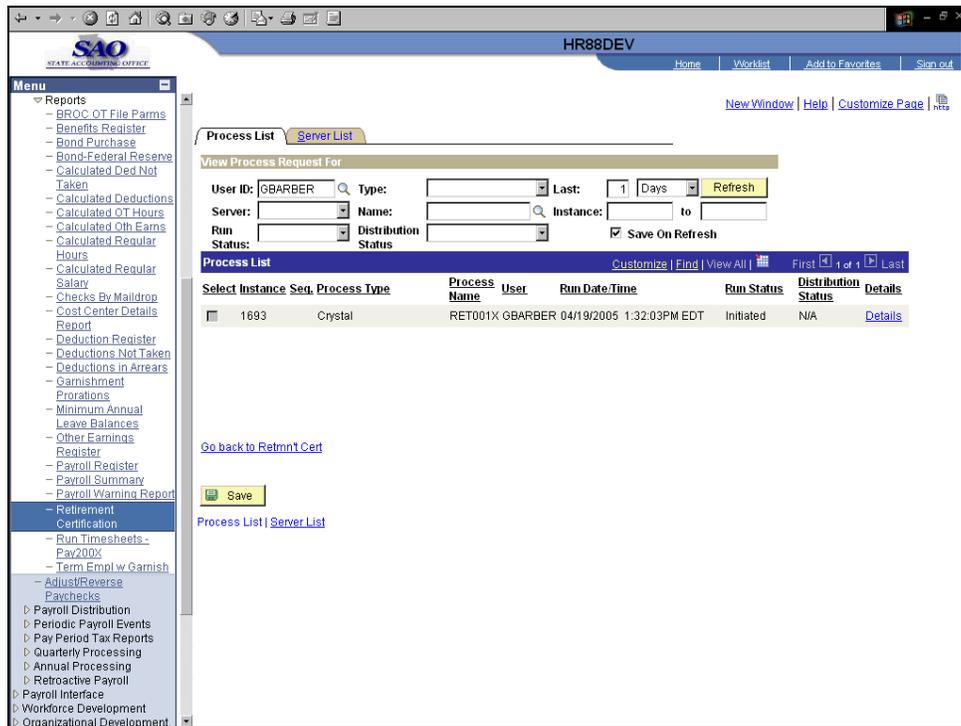
Step	Action
17.	<p>The report is now running. Notice that your report has been assigned a Process Instance number. This number is automatically generated when a process is requested. It is a good idea to make a note of the Instance number for future tracking.</p> <p>Press Tab to continue.</p>



Step	Action
18.	<p>Now that you have used Process Scheduler to run your report, you next will use Process Monitor to monitor the status of your report.</p> <p><u>You use Process Monitor to:</u></p> <ul style="list-style-type: none"> • Check the status of your submitted process requests. • Cancel process requests that have been initiated or are currently processing. • Hold process requests that are queued, and queue process requests you have put on hold. • Access to the report you have requested to be run. (If not processed through Document Direct.) <p>Click the Process Monitor link.</p> <p>Process Monitor</p>

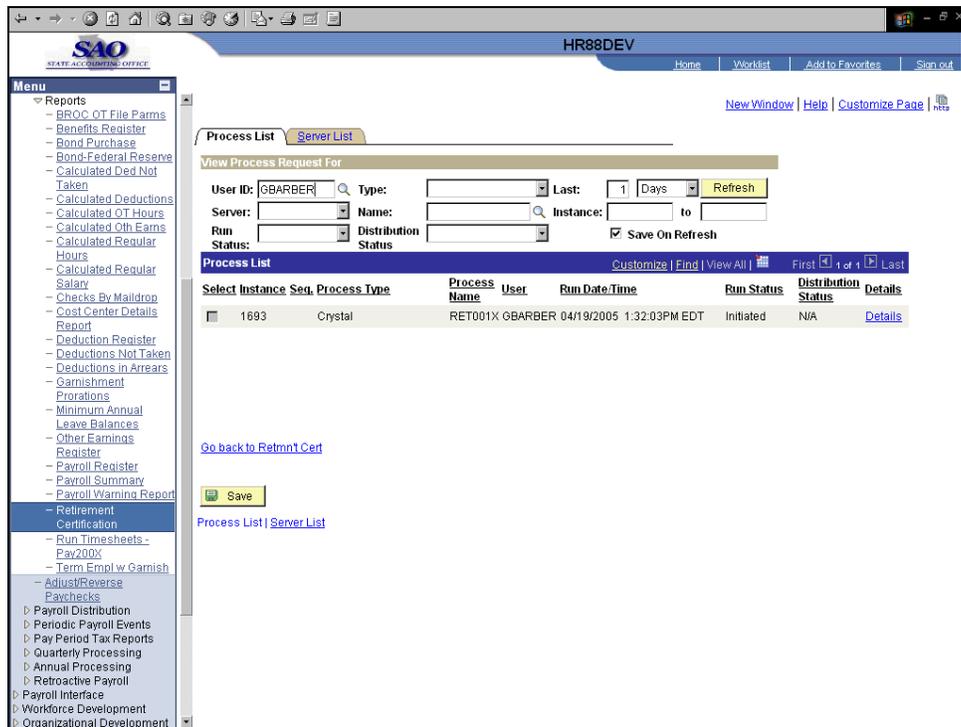


Step	Action
19.	Use the fields in the View Process Request For section to display specific processes based on the criteria entered in these fields. Press [Tab] to continue.

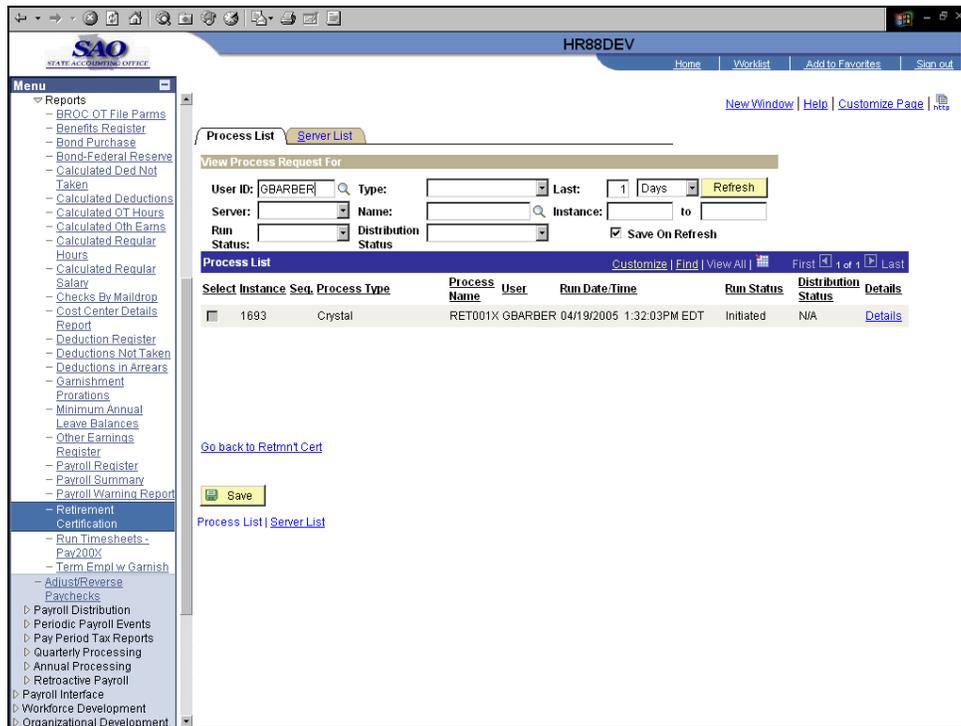


Step	Action
20.	Use the User ID field to view the processes submitted by a User ID. Usually, you view your own User ID. Leave this field blank to view all of the User ID's that you are authorized to view. Press [Tab] to continue.
21.	Use the Type field to view by a process type, such as Application Engine, Crystal, COBOL, SQR, or Application Engine processes. Leaving the field blank will view all process types. Press [Tab] to continue.
22.	Use the Last field to specify an interval of time by which to limit the process requests that appear in the list. Enter a numerical value in the field, and then select a unit type: Days, Hours, or Minutes. Press [Tab] to continue.
23.	Use the Server field to view processes that are run on a particular server. Leaving the field blank will return all servers. Press [Tab] to continue.

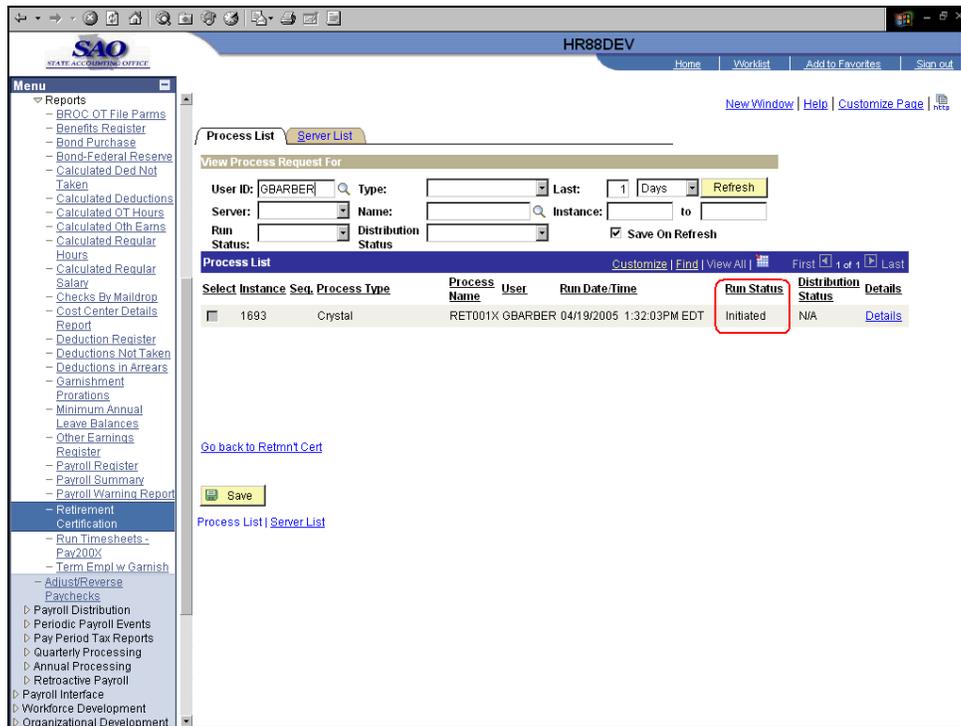
Step	Action
24.	Use the Name field to view all processes for a specific process name. Leaving the field blank will return all processes. Press [Tab] to continue.



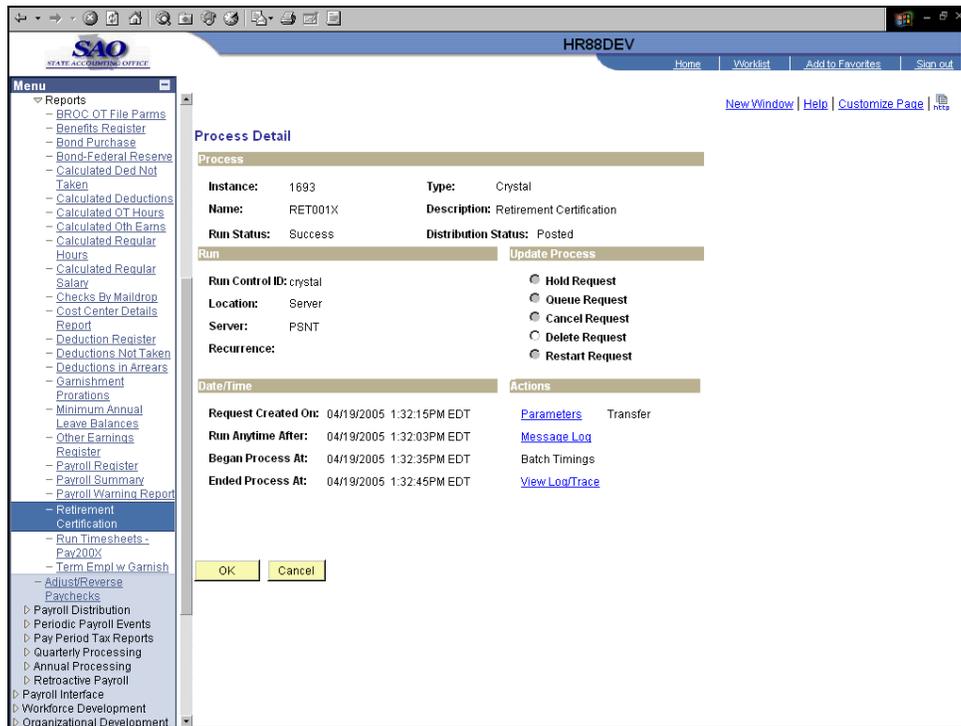
Step	Action
25.	Use the Instance fields to display results based on the process instance number. Leaving the fields blank will return all processes. Press [Tab] to continue.



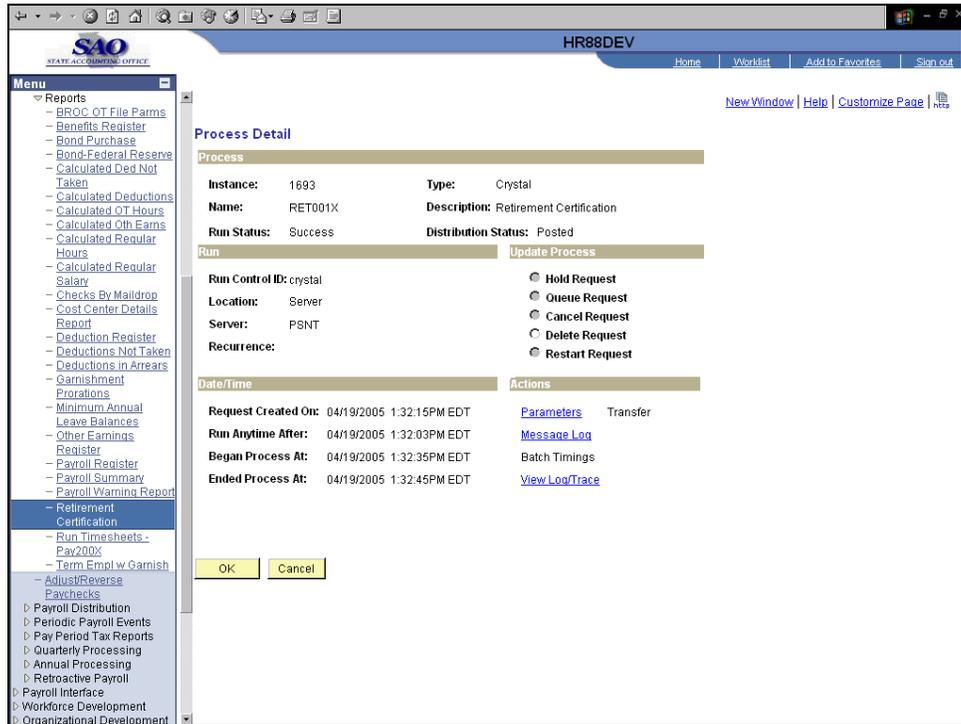
Step	Action
26.	Use the Run Status field to view processes by status, such as Processing, Success, or Error. Leaving the field blank will return all processes. Press [Tab] to continue.
27.	The current status of the report is Initiated . The report is finished running when it has a status of Success . The amount of detail the report is will dictate how long it takes to obtain a status of Success. This report is not long, so you will click the Refresh button after a few moments to update the Run Status . For reports that take longer to run, it is a good idea to continue other work while your report is being run in the background; there is no need to watch and wait. Press [Tab] to continue.



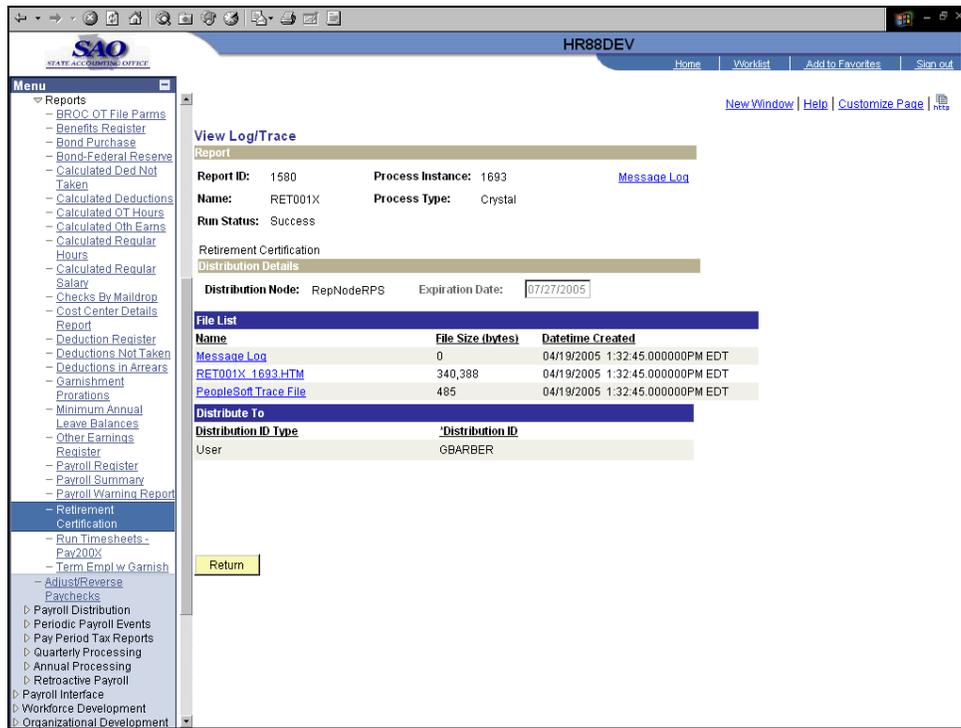
Step	Action
28.	Use the Refresh push button to display any updates to the Run Status . Click the Refresh button. 
29.	By refreshing the page, the Run Status now shows "Success". Press [Tab] to continue.
30.	Your report status has completed successfully and the report has posted and is ready for viewing. You can get details about a particular process request by clicking the Details link in the Details column. This opens the Process Detail page where you can view such details as request parameters and message logs. Click the Details link. 



Step	Action
31.	<p>The Process group box contains general information to help you identify the process request. This is a display-only group, showing basic descriptive information about this process.</p> <p>Press [Tab] to continue.</p>
32.	<p>The Run group box shows specific run information, such as the Run Control ID and the Run Location. If the process runs on the server, the server name appears in the Server field and any run recurrence that you have selected appears in the Recurrence field.</p> <p>Press [Tab] to continue.</p>
33.	<p>The Update Process group box displays the actions you can take for this field depending upon your user authorizations and the current status of the request.</p> <p>Press [Tab] to continue.</p>
34.	<p>The Date/Time group box give you specific date/time lengths about the run time of your report and the processing time.</p> <p>Press [Tab] to continue.</p>



Step	Action
35.	<p>The Actions group box contains links to other pages that provide additional details about the process parameters. These include Parameters, Message Log and View Log/Trace.</p> <p>Click the View Log/Trace link.</p> <p>View Log/Trace</p>



Step	Action
36.	Click the RET001X_1693.HTM link to view the report. RET001X_1693.HTM

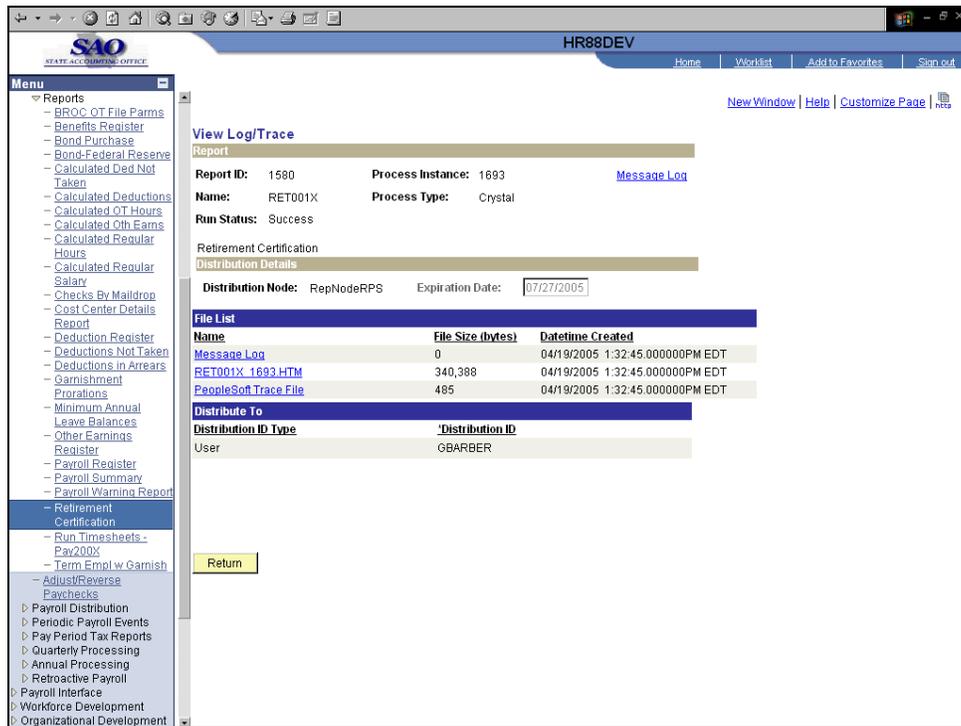
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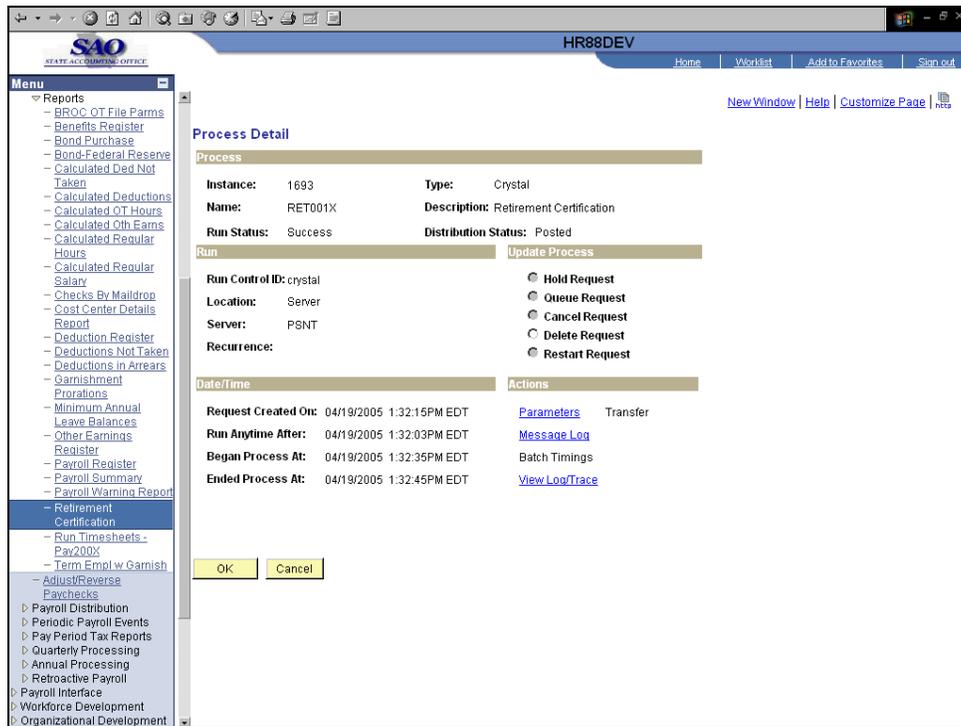
Co	Pay Group	Pay End Date	Fac# Mth	Check#	Off Cye	Empld	Empl Recd#	Name	Plan Type	Benefit Plan	Deduct	Amount	Deduction Amount	Reason	Calcd Base	Pension Plan Salary
416	SS1	07/15/02	1	2016	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	49.43	0.00		3,294.67	0.00
416	SS1	07/15/02	1	2016	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	161.23	0.00		3,294.67	0.00
416	SS1	07/15/02	1	2016	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	194.71	0.00		3,294.67	0.00
416	SS1	07/31/02	1	2048	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	49.43	0.00		3,294.67	0.00
416	SS1	07/31/02	1	2048	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	161.23	0.00		3,294.67	0.00
416	SS1	07/31/02	1	2048	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	194.71	0.00		3,294.67	0.00
416	SS1	08/15/02	2	2055	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	49.43	0.00		3,294.67	0.00
416	SS1	08/15/02	2	2055	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	161.23	0.00		3,294.67	0.00
416	SS1	08/15/02	2	2055	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	194.71	0.00		3,294.67	0.00
416	SS1	08/31/02	2	2088	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	49.43	0.00		3,294.67	0.00
416	SS1	08/31/02	2	2088	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	161.23	0.00		3,294.67	0.00
416	SS1	08/31/02	2	2088	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	194.71	0.00		3,294.67	0.00
416	SS1	09/15/02	3	2122	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	49.43	0.00		3,294.67	0.00
416	SS1	09/15/02	3	2122	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	161.23	0.00		3,294.67	0.00
416	SS1	09/15/02	3	2122	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	194.71	0.00		3,294.67	0.00
416	SS1	09/30/02	3	2157	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	49.43	0.00		3,294.67	0.00
416	SS1	09/30/02	3	2157	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	161.23	0.00		3,294.67	0.00
416	SS1	09/30/02	3	2157	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	194.71	0.00		3,294.67	0.00
416	SS1	10/15/02	4	2192	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	50.54	0.00		3,368.80	0.00
416	SS1	10/15/02	4	2192	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	164.94	0.00		3,368.80	0.00
416	SS1	10/15/02	4	2192	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	199.09	0.00		3,368.80	0.00
416	SS1	10/31/02	4	2227	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	50.54	0.00		3,368.80	0.00
416	SS1	10/31/02	4	2227	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	164.94	0.00		3,368.80	0.00
416	SS1	10/31/02	4	2227	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	199.09	0.00		3,368.80	0.00
416	SS1	11/15/02	5	2263	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	50.54	0.00		3,368.80	0.00
416	SS1	11/15/02	5	2263	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	164.94	0.00		3,368.80	0.00
416	SS1	11/15/02	5	2263	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	199.09	0.00		3,368.80	0.00
416	SS1	11/30/02	5	2301	N	99212022	0	Avalon, Tom R	82	E20AR+	ERS2	50.54	0.00		3,368.80	0.00
416	SS1	11/30/02	5	2301	N	99212022	0	Avalon, Tom R	83	E30AR+	ERS3	164.94	0.00		3,368.80	0.00
416	SS1	11/30/02	5	2301	N	99212022	0	Avalon, Tom R	84	E40AR+	ERS4	199.09	0.00		3,368.80	0.00

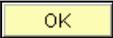
Step	Action
37.	The report displays in the Web HTM format. When in a live database, you will click the File menu and then choose the Print option in order to print your report. Press [Tab] to continue.



Step	Action
38.	Click the Return button.



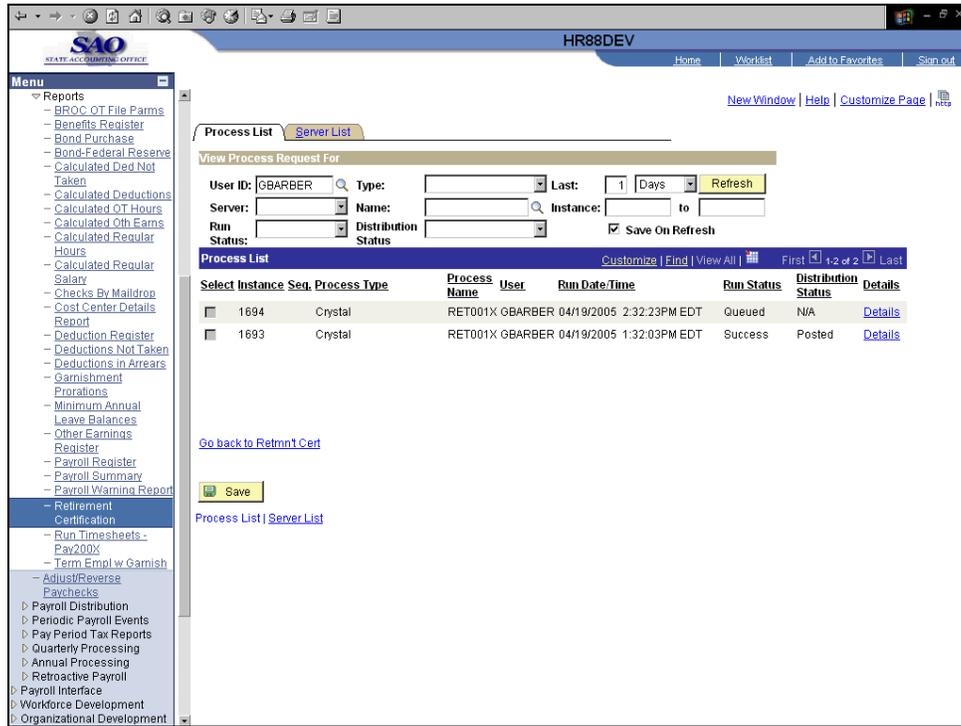


Step	Action
39.	Click the OK button. 

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Step	Action
40.	Click the Go back to Retmn't Cert link. Go back to Retmn't Cert
41.	You have successfully completed the Running & Viewing Crystal Reports topic. End of Procedure.