





Enterprise Report Writer

Contents

Introduction	3
Basics	6
Setup	6
Getting Back To Basics	8
Object Management Workbench	10
 Reporting Overview	13
Report Planning	13
Report Components	14
Report Sections	15
Report Design	23
Getting Started	25
Navigation	25
Create a Columnar Section	43
Objective of this Exercise	43
Preparation	43
Section Layout	45
Create a Group Section	50
Objectives of the Exercise	50
Preparation	50
Section Layout	51
Change Formats & Modify Objects – Columnar Section	57
Change Formats & Modify Objects – Group Section	67
Create Page Header and Report Header	74
Create Report Footer	78
Create a Level-Break Header	82
Create a Level-Break Footer	89
Subsection Joins	95
Batch Versions	106
Submit and View Reports	113
Create Version Overrides	118
Create Event Rules	123

Create a Tabular Section with Drill Down	139
Processing Options	146
Creating a Processing Option	146
Attach a Processing Option.....	150
Business Views.....	156
Create a Business View using a Single Table	156
Create a Business View using Multiple Table.....	160
Create a Folder for Business View Favorites.....	164
Add Business Views to Favorites.....	167
Using Notes with a Favorite, Folder or Subfolder	168
Working with Favorites Description Translations	170
Event Rule Variables	172
Conditioning a Level-Break Section	189
Utilizing Table IO to Fetch Data.....	198
Utilizing Table IO to Update a Table	206
 Appendix A	217
Object Management Workbench	217
 Appendix B.....	251
Tools.....	251
EnterpriseOne Modification Rules	251
Appendix C	263
Naming Conventions	263
 Glossary	270

Introduction

PeopleSoft offers developers and power users the tools necessary to create Enterprise Reports for all functional areas within the company.

With the tools described in this user guide, students will obtain the knowledge and hands-on experience to create effective and professional reports for their enterprise.

Use this workbook to better understand:

- The power and functionality of Enterprise Report Writing
- Basic Report Writing Overview
- Samples of the many tools PeopleSoft offers report writers
- Advanced Tips and Techniques that illustrate how to write creative and powerful reports
- Gotcha's we have experienced during our implementation work

Should you need consulting help to creating reports for your enterprise, we will be glad to recommend to you the best consultants from our growing network of qualified independents, business partners, and PeopleSoft employee consultants.

You may call us for help as you go through the workbook. Contact us at 1.970.856.4811 or email us at ERWHelp@JDETips.com
Purchasers of the workbook are entitled to two (2) free hours of telephone support.

The information in this guide comes from the collective experience of the consultants at Klee Associates, Inc. Our Enterprise Report Writer specialists have implemented PeopleSoft's ERW solution at dozens of client sites around the world.

Klee Associates, Inc., consultants have spent years collecting these ideas and synthesizing the best ones for this workbook. The primary authors are:

Betty Townsend, Vice President of The Townsend Family Corporation has been implementing EnterpriseOne applications for over 13 years.

Jim Kwawegen, ERPConsulting, contributed the appendices and glossary. He is also responsible for the editing of the manual.

Excuse us for a moment, would you?

Legal Speak: *The tips, techniques and concepts disclosed in this workbook are, and remain, the exclusive property of Klee Associates, Inc. , protected by trademarks and copyrights. Unauthorized use of this material (in this workbook) may subject you to legal action.*

Purchase of this book or acquisition at an official JDETips workshop, constitutes an implied agreement by the purchaser to a limited, nonexclusive license granted to the purchaser by Klee Associates, Inc., specifically for purposes limited to improving your personal knowledge of PeopleSoft software which does not in any way compete with Klee Associates. Clients of PeopleSoft are asked to obtain permission from Klee Associates in writing prior to conducting internal training. No charge will be assessed clients who wish to do training using the materials, unless they wish to make copies of the workbook.

Reproduction of the material (all or part of it) in this workbook in any manner is not allowed. This workbook is sold on a per reader basis, so giving copies to others is the same thing as stealing copies at a bookstore.

*Inclusion of the **concepts** in this book in any internal client training material is allowed if the source of the concepts is acknowledged as follows:*

*Copyright 2004,
All rights reserved.
Used with permission.
Klee Associates, Inc.
PO Box 781
Cedaredge, CO 81413 USA
1-970- 856-4811*

If you are a consultant please remember that it is neither nice nor right to steal, commercialize, plagiarize, or make money off this work without permission. You are not allowed to use the material in this workbook to conduct internal or external training without being licensed by Klee Associates, Inc.

Call us at JDETips/Klee Associates, Inc. and let's talk. Or my friends at the legal firm of Cage Williams Abelman and Layden will be calling you.

JDETips is fast becoming a valued resource for thousands of clients and consultants worldwide. Visit our web site for more information about upcoming training, books, and newsletters.

www.JDETips.com

JDETips is a registered trademark of Klee Associates, Inc.

The use of JDE, World, and OneWorld are granted to Klee Associates by permission from J. D. Edwards World Source Company. The use of PeopleSoft is granted to Klee Associates by permission of PeopleSoft.

The information in this document is the copyrighted work of Klee Associates and is owned by Klee Associates.

NO WARRANTY: This documentation is delivered as is, and Klee Associates makes no warranty as to its accuracy or use. Any use of this documentation is at the risk of the user. Although we make every good faith effort to ensure accuracy, this document may include technical or other inaccuracies or typographical errors. Klee Associates reserves the right to make changes without prior notice.

PeopleSoft software referenced in this document is furnished under license agreements between PeopleSoft and their customers and can be used only within the terms of such agreements. J.D. Edwards is a registered trademark of PeopleSoft. JDE, World Software, EnterpriseOne and OneWorld Software are registered trademarks of PeopleSoft.