Generating Reports:
Accessing User Reports

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PeopleSoft includes the capability to establish reports that users can run directly without SES staff intervention. These reports will be maintained on V:\SES\CrystalReports so that they will be accessible to all system users with the appropriate security access.

These reports are accessed directly from the V: drive. To map to the V: drive, your computer must have the Client for Microsoft Networks installed. Please consult your department’s technical staff in this matter.

Before beginning with the installation instructions, it will be helpful to know which operating system your computer is running. Crystal Reports v2008 is supported if you are running the Windows XP operating system. You can also map your drive and run Crystal Reports v2008 using the Windows 7 operating system. Please note that these instructions include some Windows 7 specific screenshots or instructions (See page 14 for the most important Windows 7 specific details.). Note also that, while Crystal Reports may install and run on the Windows Vista OS, it is not supported by SES.

Note for Windows 7 users: Please be sure to see page 14 of this document for a very important step if you are installing Crystal Reports v2008 using the Windows 7 operating system.
1. Map your V: Drive to ses9share.

This should be part of your standard startup procedure. To map your V drive, right-click on the “My Computer” icon on your desktop (or from your Start Menu) and choose “Map Network Drive…” Select “V” for the drive and enter “\ses9share.ci.northwestern.edu\psft” as the folder. Check the box for “Reconnect at logon.”

Your settings appear as one of the following:

Windows XP

Windows 7

Next, in Windows XP, click on the different user name link to enter your ses9share username. In Windows 7, check the “Connect using different credentials” box and click Finish. Your ses9share username is your NetID preceded by “ADS\”. For example: ADS\abc123, where abc123 is your NetID.

Windows XP

Windows 7

Enter your NetID password and click OK.
In **Windows XP**, back at the “Map Network Drive” window (below), click **Finish**. This step will connect you to ses9share.

Your folder should appear similar to the following:
If you selected the option to reconnect at logon, the folder in the previous screenshot will not automatically open every time you reboot your computer. In **Windows XP**, you can access it by clicking on the **My Computer** icon on your desktop and then clicking on the “psft on ‘Windows/NT 4.0 (ses9share.ci.northwestern.edu)’ (V:)” icon.

In **Windows 7**, you can access the folder by clicking on **Computer** in your Start Menu and then clicking on the “psft (\ses9share.ci.northwestern.edu) (V:)” icon.
2. Check to make sure you do not have Crystal Reports v2008 installed on your workstation. If you have Crystal Reports v2008 on your workstation follow the instructions below to remove it. If your computer is new, or has never had Crystal Reports v2008 installed on it, you may skip this step.

To check for Crystal v2008, navigate from your Start menu to the Programs folder. If you have a shortcut in your Programs folder called “Crystal Reports 2008” you will need to uninstall Crystal Reports v2008 before proceeding. (If you do not have the shortcut, proceed to step #3 below.) To uninstall Crystal Reports v2008 on a Windows XP workstation, navigate from your Start menu to: Settings, Control Panel, Add or Remove Programs. Windows7 workstation, navigate from your Start menu to: Control Panel, Programs, Uninstall a program. Click on the Crystal Reports v2008 for PeopleSoft and press the Remove button. (If you have other programs such as “Crystal Reports v2008 SP1” or “Crystal Reports v2008 SP2” these will need to be removed as well.) When the process(es) are complete proceed to step #3.

Windows XP:

![Add or Remove Programs window](image)
Windows 7:

You may see the following dialog box as the application uninstall process proceeds.

When the uninstall process is complete, Crystal Reports v2008 will no longer appear in your list of programs to Add or Remove.
You will then be prompted by the box below to restart your computer, with the options of restarting immediately or later. Note: Crystal Reports v2008 will not appear as removed until you restart your computer.

![Crystal Reports 2008 SP1 for PeopleSoft](image)

Note: if the uninstall process did not remove the Crystal Reports 2008 shortcut from your Start menu, simply right mouse click on the icon to delete it.
3. Set up your computer to recognize a Crystal Report v2008 SP3.

Open either “My Computer” or “Computer,” depending on your Windows Operating System. After a successful map to the V: drive, you will see an icon labeled “psft on ‘ses9share.ci.northwestern.edu’(V:)”, under your Network Drives.

![Computer window with V: drive](image)

Double left-click on the “psft on ‘ses9share.ci.northwestern.edu’(V:)” icon. This will open up your (V:) drive window (not shown).

Navigate to the V:\SES\Crystal_App_Install\CrystalReports folder.

![Folder with setup.exe](image)

Double left-click on the setup.exe file to begin the installation of Crystal Reports version 2008. (Note: You may or may not see the .exe file extension.)

Note that its file type is an Application.
The User Account Control box warning may appear asking “Do you want to allow the following program to make changes to this computer?” [Program Name: BusinessObjects Setup]. Click **Yes** to continue.

The Crystal Reports 2008 SP3 Setup Dialog box appears. Press the “OK” button to continue.

![Crystal Reports 2008 SP3 Setup Dialog Box](image)

The Crystal Reports 2008 SP3 for PeopleSoft Setup Dialog box appears. Exit all Window programs and press the “**Next**” button.

![Crystal Reports 2008 SP3 for PeopleSoft Setup Dialog Box](image)
The Crystal Reports 2008 SP3 License Agreement box appears. Check the “I accept the License Agreement” button and press the Next button.

The Choose Language Packs box appears. Make sure “English” is checked and click the “Next” button.
The Crystal Reports 2008 SP3 for PeopleSoft Setup, Select installation Type box appears. Choose the “Typical” install option and press the Next button.

![Select Installation Type]

The Crystal Report 2008 SP3 for PeopleSoft Setup, Start Installation box appears. Press the “Next” button to continue.

![Start Installation]
Wait patiently for the Crystal install to complete.

www.sap.com/sapbusinessobjects

The Crystal Reports 2008 SP3 for PeopleSoft Setup, Crystal Reports 2008 SP3 for PeopleSoft has been successfully installed box appears. Press the “Finish” button to complete the install.
Back in your V: drive window, navigate to the “V:\SES\Crystal_Master_852” folder, and open it.
If you have Windows 7, please first complete the section below BEFORE completing the remaining steps. Windows XP users can skip to the section on the next page.

Windows 7 users:
Before you double-click the “crw_windows.s9prod.cmd” file, please do the following:

1. Click the Windows Start icon in the bottom left of your screen.
2. In the search box that appears, type “cmd” (DO NOT hit “Enter.”).
3. You will see a search result “cmd.exe” or simply “cmd” (under the Programs heading). Right-click that search result and choose “Run as Administrator.”
4. The User Account Control box warning appears asking “Do you want to allow the following program to make changes to this computer?” [Program Name: Windows Command Processor]. Click Yes to continue.
5. At the command line that comes up, type the text in the screenshot below (“net use v: \ses9share.ci.northwestern.edu\psft”). Hit “Enter.”
6. After a brief moment, you should see a success message. Then, close the cmd box and continue with the instructions (starting by double-clicking the “crw_windows.s9prod.cmd” prompt above).

Note: spaces are important!!!!

You will need to type “net” space “use” space “v:” space “\ses9share.ci.northwestern.edu\psft”
Double-click on the “crw_windows.s9prod.cmd” icon.

![Image of Open File - Security Warning]

An Open File – Security Warning box will appear. Press the **Run** button to continue.
A **DOS window** will open on your computer and start copying the files necessary to run Crystal Reports. Several dialog boxes will appear asking if you are sure you want to run this software or if you would like to add files to your registry. Click **Run**, **Yes** or **OK**. when prompted. (Note: this process may be repeated several times.)

An Open File – Security Warning box will appear. Press the  button to continue.

A User Account Control warning box may appear asking “Do you want to allow the following program to make changes to this computer?” [Program Name: Registry Editor]. Click **Yes** to continue.
A Registry Editor box will appear. Press the “Yes” button to continue.

Click OK to continue…


A User Account Control warning box may appear asking “Do you want to allow the following program to make changes to this computer?” [Program Name: Registry Editor]. Click Yes to continue.
A Registry Editor box will appear. Press the “Yes” button to continue.

Click **OK** to continue…

The User Account Control box warning appears asking “Do you want to allow the following program to make changes to this computer?” [Program Name: Windows Command Processor]. Click **Yes** to continue.

Toward the end of the process, the .cmd script may ask you if you would like to create the c:\temp folder. Enter a **Y** in the DOS window and hit **Enter**. When the program is finished running, the DOS window will close automatically.
The User Account Control box warning appears asking “Do you want to allow the following program to make changes to this computer?” [Program CRRuntime_12_3_mlb.exe]. Click Yes to continue.

The Windows Installer box appears alerting you that it is preparing to install.

![Windows Installer]

The Crystal Report 2008 Runtime SP3 Setup Installation Wizard box appears.

![Crystal Report 2008 Runtime SP3 Setup]

Click “Next” to continue.
The Crystal Report 2008 Runtime SP3 License Agreement box appears. Check the “I accept the License Agreement” button and press the “Next” button.

The Crystal Report 2008 Runtime SP3 Setup Installation box appears. Press the “Next” button to continue.

The Crystal Report 2008 Runtime SP3 Setup box appears. Wait for the process to complete.
The Crystal Report 2008 Runtime SP3 Setup, Crystal Reports 2008 Runtime SP3 has been successfully installed box appears. Press the “Finish” button to complete the install.
Once the DOS windows are closed and the install processes are complete, you will need to update your environment variables.

4. Update Your Environment Variables.

Navigate from your Start menu to Control Panel:

Text instructions to update your environment variables, complete instructions with screen for adding the pshome location and Crystal install location to the beginning of the Path system variable provide on pages following. (For Windows XP: Start Menu > Control Panel > System > Advanced > Environment Variables. For Windows 7: Start Menu > Control Panel > System and Security > System > Advanced System Settings > Environment Variables.) **CAUTION: BE VERY CAREFUL TO COPY THE INFORMATION LOCATED WITHIN THE QUOTATION MARKS PROVIDED (EXCLUDING THE QUOTATION MARKS) IN FRONT OF THE EXISTING PATH – DO NOT REPLACE THE INFORMATION THAT APPEARS IN YOUR WORKSTATION PATH!!!!**

For Windows XP, the paths to be added to the beginning of the “Path” system variable are “C:\Program Files\Business Objects\BusinessObjects Enterprise 12.0\win32_x86;V:\s9prod\bin\client\winx86;”. For Windows 7 the paths to be added to the beginning of the Path system variable are: ”C:\Program Files (x86)\Business Objects\BusinessObjects Enterprise 12.0\win32_x86;V:\s9prod\bin\client\winx86;”.

**
Click on “System and Security”:

![Click on System and Security](image1)

Click on “System”:

![Click on System](image2)
Click on “Advanced system settings”:

Click on “Environment Variables”:
On the Environment Variables page, under “System variables”, scroll down to “Path”:

![Environment Variables](image)

Double click with your left-mouse button on “Path”. The Edit System Variable box appears.

![Edit System Variable](image)

Note: be very careful not to delete any existing information in the Variable value field. Put your cursor in the field and scroll as far left as possible and place your cursor in front of the left most character. You do not want to replace or delete any text in this field!!! You want to insert the text provided on the next page in front of the existing text.
BE VERY CAREFUL TO COPY THE INFORMATION PROVIDED IN FRONT OF
THE EXISTING PATH – DO NOT REPLACE THE INFORMATION THAT
APPEARS IN YOUR WORKSTATION PATH!!!!

For Windows XP, the paths to be added to the beginning of the “Path” system variable
areas follows:

C:\Program Files\Business Objects\BusinessObjects Enterprise 12.0\win32_x86;
V:\s9prod\bin\client\winx86;

For Windows 7 the paths to be added to the beginning of the Path system variable are as
follows:

C:\Program Files (x86)\Business Objects\BusinessObjects Enterprise
12.0\win32_x86;V:\s9prod\bin\client\winx86;

When you have finished pasting in the environment variables press the “OK” button, then
click “OK” on each of the remaining environment variable windows until they are all
closed.

When all of the above referenced steps are complete, shut down and restart your
computer before proceeding to run a Crystal Report.
5. Run a Crystal Report.

Navigate to the root of the (V:) directory and open the “SES” folder.

Then open the CrystalReports folder.

Then open the appropriate folder within. For this example, we show you how to run a class tabulation report from the CrystalReportsMain folder. However, all reports are executed the same way. If you do not have access to the CrystalReportsMain folder, run a report from one of the other folders you have the ability to access.
Depending on your business need, you may see one or more folders that contain Crystal Reports. For the purpose of illustration, click on the Class Tabulation Report, “ClassTabulation.rpt” located in the “CrystalReportsMain” folder.

To open the report, double left-click on the report, or right click and choose Open.
The Crystal Reports window will open. Your computer is now ready to run a Crystal Report.

All Crystal Reports are **Write** protected; therefore, you will see the following dialog box when you open a report. Click **OK** and follow the instructions for running the reports.
The Class Tabulation Report looks like the following. To run the report, click the Refresh icon in the top toolbar or hit F5 on your keyboard.
This report allows you to narrow the results by offering a series of prompts. The first set appears immediately after clicking the Refresh icon. By choosing a value from the drop-down menus in the Campus, Subject, or School fields—or by entering values in the fields if you know the correct formats—the report returns data limited to your selection when you click OK. Leaving the default value * returns all data regardless of campus, subject, or school.

You may enter the term in this window (e.g., 4450 for Winter 2012), in the STRM field, or you may follow the directions on the next page—those directions that follow entering the SES User ID.
Next, the report asks for your **SES User ID and password (NOT your Net ID and password)**. Recall that your SES User ID and password are **case sensitive**.

![Image of signon window]

Finally, one last prompt appears asking for the term you would like. Clicking the down arrow provides a list of acceptable term codes and provides their descriptions. (For example, **4460** translates into Spring Quarter 2012.)

![Image of enter value window]
To print the report, click the [ ] icon in the top toolbar.

Other Crystal Reports are accessed similarly.
Exporting a Crystal Report to Another Format (such as MS Word or Excel)

Crystal Reports includes the capability to export reports to other formats such as MS Word, Excel, etc. Exporting a report to Excel would allow you to e-mail the document to another party (such as a faculty member) who could then review the file electronically or edit it to add data such as e-mail addresses or other contact information and/or sort it.

To export a Crystal Report, you must first run the Crystal Report. So for example, let’s say you have run the SCS Class Schedule and want to deliver it to a faculty member electronically in Excel format to distribute to students.

1. Run the Crystal Report called SCSClassSchedule and view your results.
2. Click on the Export icon on your toolbar.

3. The Export window appears.

4. Select a Format from the drop-down menu provided and Click OK.
5. If exporting to Excel, select the appropriate Excel Format Options and Click **OK**.

![Excel Format Options](image)

6. Choose a location to save the file to, name the file and click Save.

7. Your file will be saved in the location you chose. You can now open it as an Excel file (or whatever format you saved the document in), modify it, print it, or send it as an e-mail attachment.