



PeopleSoft Solution Extenders

PeopleSoft Solution Extenders (or PSE's) are strategic PeopleTools bolt-on's to increase the functionality and usability of PeopleSoft without impacting the current Enterprise Application environment, or the upgrade/maintenance process. In other words, we have created "PeopleTools within PeopleTools".

Benefits

We have already created PeopleSoft Solution Extenders for the common enhancements requested by PeopleSoft customers in PS/Query, Crystal, PS/nVision, PS/Report Manager, and PS/Process Scheduler. They can be deployed individually or together. Here are some of the benefits that PSE's can provide you.

PS/Query	<ul style="list-style-type: none"> Rich formatting of queries (incl. headers, footers, aggregates, subtotals, etc.) Improved user interface including drag and drop Query Wizard with Data Objects Improved query drilling Improved security and sharing of queries Improved searching and organization of queries.
PS/nVision	<ul style="list-style-type: none"> Improved drilling in PS/nVision Improved nVision report execution Multiple Field nPlosion Thin Client PS/nVision report design Improved nVision report design usability Improved handling of Excel features Support for a separate Reporting Instance Support for nVision reports against prompted queries Improved bursting and distribution Ability to add timespan criteria for non-ledger based nVision reports Ability to use multiple matrix layouts (TABS/Spreadsheets) in a single workbook (.xnv file) Ability to do "NOT" statements in nVision criteria
Report Security and Distribution (includes extensions to PS/Process Scheduler and PS/Report Manager)	<ul style="list-style-type: none"> Visual Job Editor & Assembler (i.e. drag&drop) Job/Process Group Page Job/Process Group Distribution Page Automatic generation of report request and job definitions Auto generation of email for each user that contains a consolidated list of links to all appropriate reports Report distribution can be through a daily email with links to reports that have been run that day Job/Report Group Audit Reports (Includes User privileges report) Run to window for PeopleTools 8.1x Support for a separate reporting instance Improved security and sharing of reporting objects. Improved organization and navigation to reports and report instances
Crystal	<ul style="list-style-type: none"> Run to Crystal from PeopleTools 8.1x Improved parameter handling Improved use of PeopleSoft-delivered reports Query to Crystal for running and accessing report instances

PS/Query Solution Extender

The most commonly requested enhancements to PS/Query have been packaged into a PeopleTools bolt-on called the PS/Query Solution Extender.

Rich formatting for queries	PeopleSoft query results can now be customized via rich formatting options similar to major BI/Reporting products. (incl. headers/footers, aggregate, grouping, subtotals, etc.)
Improved query sharing and security	PeopleSoft queries will be able to be secured to a given user, set of users, or role. This will control who will have access to run, modify, or view results of any given query.
Query Wizard	This wizard will simplify the picking of all records to be included by understanding relationships between tables in the application automatically. The output of this wizard is a default query, which will be updated in PS/Query.
Support for a separate Reporting Instance	PeopleSoft customers will have the flexibility to deploy PS/Query and Crystal Enterprise against a different environment than your transaction system, and still retain the ability to drill between the two.
Drag and Drop in Query Designer	PeopleSoft customers will be able to use drag and drop to select fields, add criteria, and re-order parts of the query to improve usability.

PS/nVision Solution Extender

The most commonly requested enhancements to PS/nVision have been packaged into a PeopleTools bolt-on called the PS/nVision Solution Extender.

Improved drilling	<p>The PSE will improve drilling in nVision with the following features:</p> <ul style="list-style-type: none"> • Drilldown layouts will automatically be organized and searchable. • The drilldown list will be pruned to exclude layouts that do not make sense with the report being drilled from. • Users will be able to choose favorite drilldown layouts. • nVision drilldowns will automatically be displayed when they are completed (PeopleSoft implemented this for PeopleTools 8.42, but not 8.1x or 8.2x).
Improved report execution	<p>The process of requesting a report to be run will be improved with the following features:</p> <ul style="list-style-type: none"> • New report request page • Improved searching for report requests, allowing a user to find reports based on fields, ledgers, or records are used in the report. • The ability to add a filter on the fly without creating a scope. • The ability to capture prompts that are part of a query that is used in an nVision report.
Multiple field nPlosion	The ability to nPplode multiple fields on a given axis in an nVision report.
Thin Client nVision report design	PeopleSoft customers will be able to build and maintain their nVision reports without having to install the PeopleTools windows client. Customers will be able to download an Excel add-in, which will communicate via HTTP to the PeopleSoft database.
Improved report design	The following features will make it easier to design nVision reports.

usability	<ul style="list-style-type: none"> • Improved searching for ledgers and queries <ul style="list-style-type: none"> ○ Ability to search based on more than ledger or query name. ○ Automatic filtering of subsequent searches based on nPloded fields (or picked sources). • Ability to build a query from nVision. • Automatic summary ledger picking and navigation. • Improved ability to define criteria and nPlosion rules by understanding data relationships. • nPlosion wizard, which guides user through defining nPlosion options and appropriately labeling nPloded fields. • Improved stylesheets, specifically with respect to different type of amounts, and for multiple labels of the same nPloded field.
Improved handling of Excel features	<p>The PSE provides a simple means of creating the following Excel objects that bind to results data.</p> <ul style="list-style-type: none"> • Autofilters • PivotTables • SubTotals • Charts
Support for a separate Reporting Instance	<p>PeopleSoft customers will have the flexibility to deploy your reporting against a different environment than your transaction system, and still retain the ability to drill between the two.</p>
Support for nVision reports against prompted queries	<p>The PSE allows users running nVision reports to capture the runtime parameters of the queries embedded in those report.</p>
Improved bursting and distribution	<p>Customers will be able to centrally manage and utilize a consistent set of rules for identifying the rules for filtering and distributing nVision report results.</p>
Ability to add timespan criteria for non-ledger based nVision reports	<p>Customers will be able to leverage the benefits of timespans for query-based nVision reports. This will eliminate the need to embed the filtering rules for date ranges in the queries that feed into the nVision reports.</p>
Ability to use multiple matrix layouts (TABS/Spreadsheets) in a single workbook (.xnv file)	<p>Customers will be able to generate workbooks with multiple crosstab (or matrix) reports. This will allow them to generate briefing books with multiple financial reports in them.</p>
Ability to do “NOT” statements in nVision criteria	<p>Customers will be able to filter on all values “except” for a set of values.</p>

Report Security and Distribution Solution Extender

The most commonly requested enhancements to report security and distribution (including enhancements to PS/Process Scheduler and PS/Report Manager) have been packaged into a PeopleTools bolt-on called the Report Security and Distribution PSE.

Visual Job Editor and Assembler	Visual Scheduling User Interface that allows administrators and users to more easily run reports: <ul style="list-style-type: none"> streamlines the run control and process request user interface new rules interface for capturing and naming parameters
Job/Process Group Page	Report group page and table structures to allow entry of report groups definitions
Job/Process Group Distribution Page	Report group distribution page and table structures to allow entry of report group distribution rules
Automatic generation of PeopleSoft processing definition's	Automatic generation of the appropriate report request and job definitions from the application, so that any reports can automatically be run and distributed to users.
Alternative Daily report notification aggregator	Process that creates an email for each user that contains a consolidated set of links to all reports in the PeopleSoft report repository that each user has access to.
E-mail Distribution Option	Report distribution can be through a daily email with links to reports that have been run that day, versus modifications to report manager
Job/Report Group Audit Report	Report that lists out all report groups and the associated PeopleSoft scheduling definitions for them. <ul style="list-style-type: none"> Includes User privileges report
Process Scheduler	All report scheduling definitions will be done using PeopleSoft's process scheduler infrastructure.
PeopleSoft Reporting Home Page	End-users will be able to access all reporting features from a home page that simplifies navigation.
Reporting Wizard	End-users will be guided through the steps of creating a report. The wizard will automatically choose the appropriate reporting tool to utilize and facilitate creating the appropriate default report, based on the type of report and the data needed.
Improved organization and searching of reports	All reports in a PeopleSoft installation will be aggregated into a single environment, so that users can easily find them. These reports can be organized and searched based on content area, user who created it, needed parameters, and content of the report (such as fields included). Users will be able to run, view, or modify any report from this user interface.
Improved organization and searching of report instances	All reports instances in a PeopleSoft installation will be aggregated into a single environment, so that users can easily find them. These reports instances can be organized and searched based on the report that was used to generate the instance, content area, user who created it, parameters used to generate the report, and content of the report (such as fields included). Users will be able to re-run any report, view any instances, or modify any report from this user interface.
Improved security against reporting objects	All PeopleSoft report objects will be able to be secured to a given user, set of users, or role. This will control who will have access to run, modify, or view results of any given report.
Integrated offloading of reporting against separate reporting environment	Although the homepage and all links will be part of the transaction system, customers have the option of offloading all report design, processing, and access to a separate reporting environment for performance purposes.

Crystal Solution Extender

The most commonly requested enhancements to PeopleSoft's integration with Crystal have been packaged into a PeopleTools bolt-on called the Crystal Solution Extender.

Enhanced PS/Query Integration	<p>To ensure that users can more easily create new reports, the extender provides the following enhancements to PS/Query.</p> <ul style="list-style-type: none">• Improved support for iterative design and development with Crystal and PS/Query• A wizard for determining what content should be in the report. (This simplifies the picking of all records to be included by understanding relationships between tables in the application automatically; Output is a default query, which will be updated in PS/Query)• Streamlined report execution and instance access between PS/Query, Report Manager, and Crystal Enterprise.• Improved handling of query parameters in Crystal• Improved bursting and report distribution in Crystal
Improved use of PeopleSoft delivered and custom reports	<p>We can improve the use of your reports that run through process scheduler in Crystal Enterprise. By combining this feature with the drilling features listed below, your users can get much more out of the reports you already have through a utility to convert them to Crystal Enterprise.</p> <ul style="list-style-type: none">• We can promote the runtime parameters in your reports by replacing the run control pages and process scheduler runtime parameters with prompts in the report that can be used in Crystal Enterprise. This will allow all reports to be more easily run centrally and used as drill targets.• We can replace the PeopleSoft ODBC driver with a multi-threaded, higher performing driver (for releases prior to PeopleTools 8.46).• We can ensure that all report parameters will be handled appropriately, and that all user preferences, such as date formatting will be applied.

Who is Grey Sparling Solutions, Inc?

Grey Sparling Solutions, Inc. combines in-depth knowledge of PeopleSoft products, Enterprise Reporting solutions, and Business Intelligence to help PeopleSoft customers improve the way their business users obtain and use information. Because we are the people who built and maintained PeopleSoft's reporting tools and PeopleTools metadata, we are in a unique position to provide superior products and solutions to maximize your PeopleSoft investment.

Interested in learning more?

Please contact us at (925) 217-1298 or at Info@GreySparling.com. We would be happy to talk with you about how we can help you improve your Informational ROI.