

PeopleTools v8.52 Crystal Reports and nVision for Windows 7 Workstation Installation Guide

Board of Regents
University System of Georgia
Office of Information Technology Services



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Introduction

These instructions are only for workstations that need access to the Crystal Reports Developer Tool or the nVision Reports Developer Tool in order to create and/or run institution developed reports. It is not necessary to install these tools to run BOR delivered reports.

Oracle 11g Client should already be installed on your workstation with the necessary files to connect to the GeorgiaFIRST Oracle database server. If you do not already have the Oracle 11g Client, please refer to GeorgiaFIRST documentation concerning installing the necessary software and connection settings to connect to the Oracle server.

IMPORTANT NOTE: Once you install these tools you will only be able to access the PeopleTools 8.52 upgraded environments. Please be aware that these installation instructions will **remove** the ability to access current production data in the PeopleTools 8.48 environments. **If you need the ability to run current Institution developed reports, either Crystal or nVision, for current production data from F89PRD or F89RPT then DO NOT install this on your workstation.** You may want to consider using a separate workstation.

Workstation Requirements

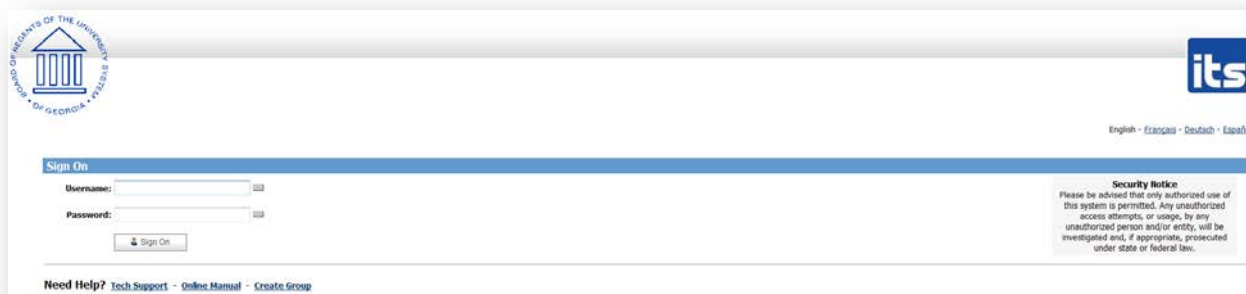
Windows 7

MacOS and Windows XP are not supported for the purposes of this PeopleTools Installation.

Download

Download the **FinPeopleTools_852.zip** from the ITS File Transfer web site:

<https://files.usg.edu/>



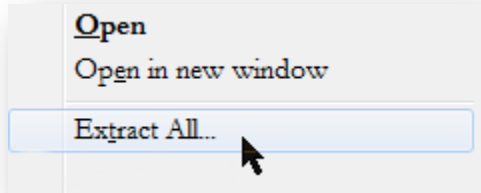
Username & password will be made available to your Institution's PeopleSoft Technical Representative through a request via the [USG ITS Customer Service Help Desk](#).

This file can be saved to either your local or network drive.

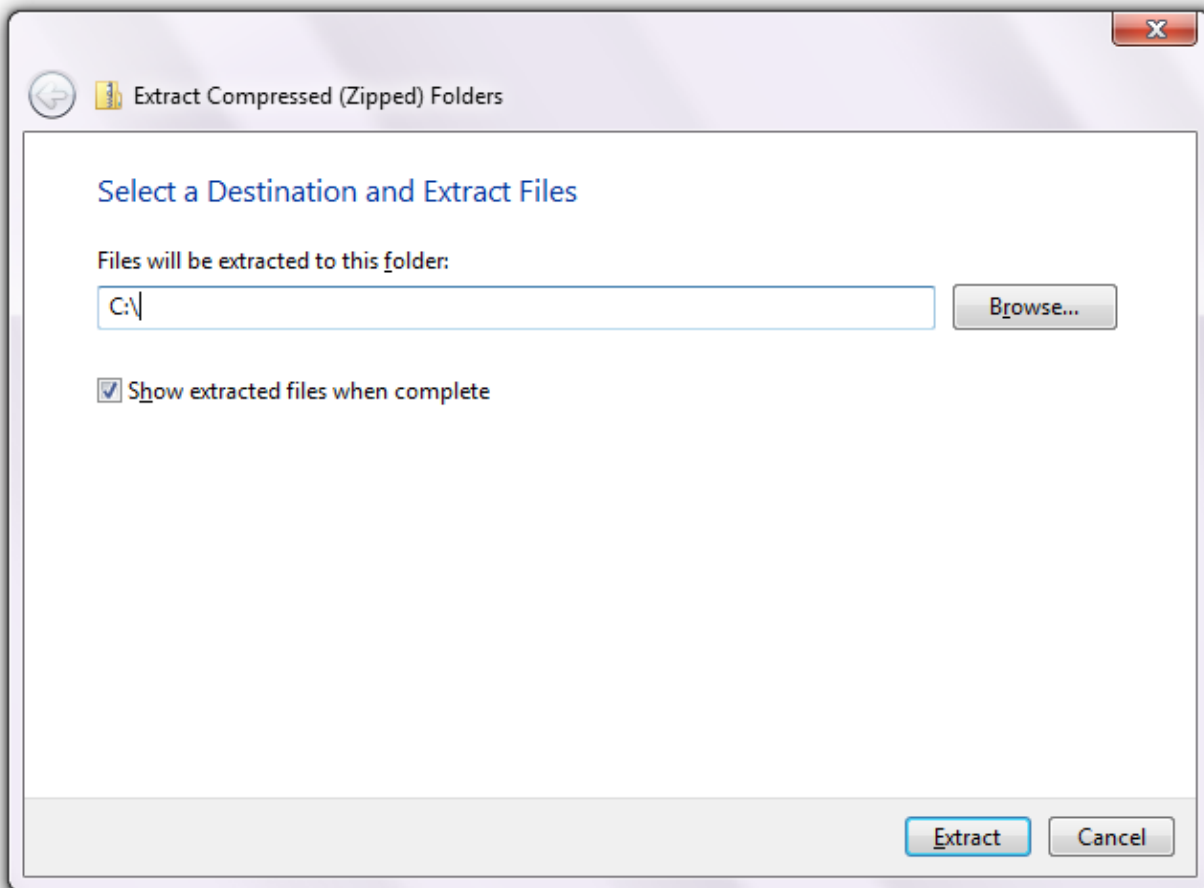
After Download - Extract

After downloading the **FinPeopleTools_852.zip** file:

Please Right Click on the zip file and Choose Extract All.

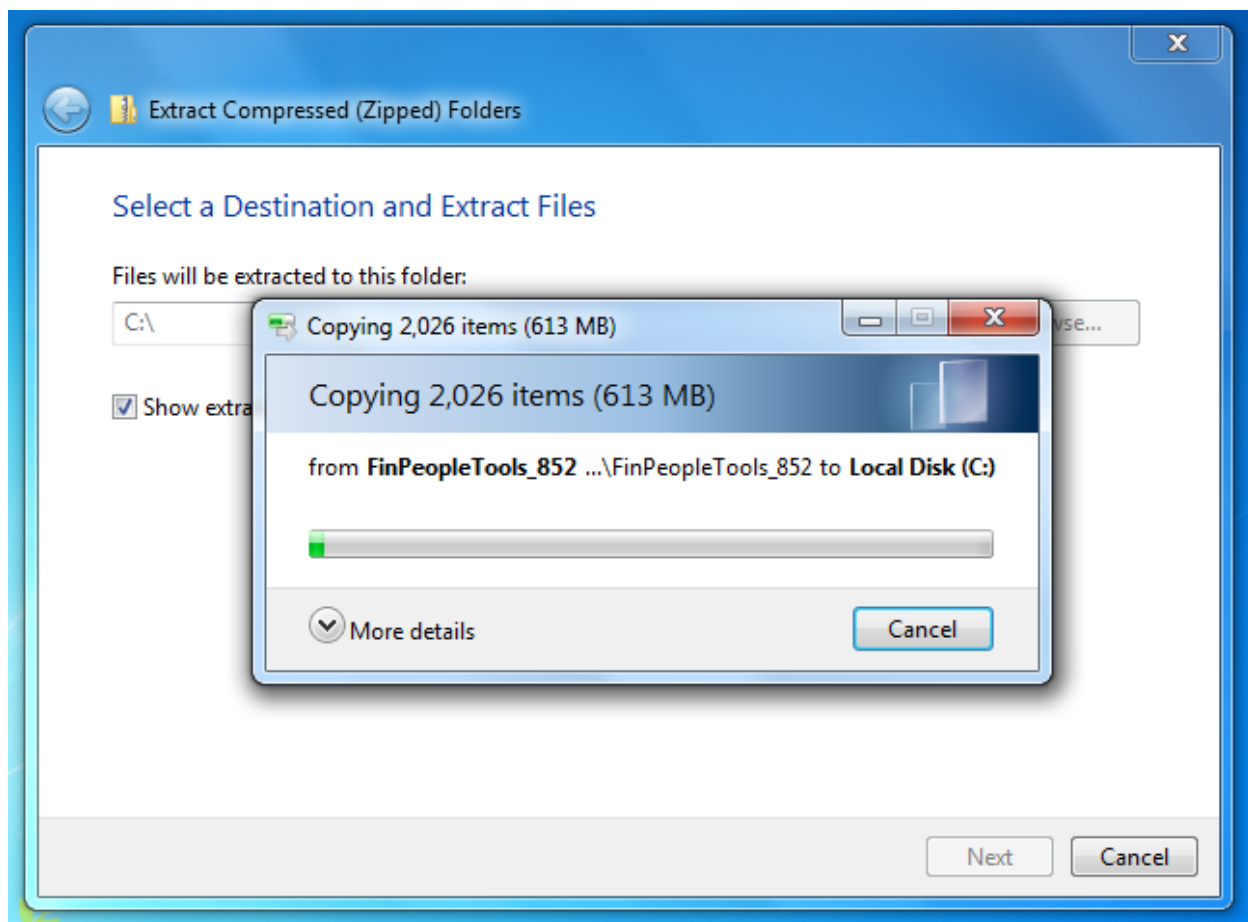


Make sure the path is the root of your local C: drive.



For convenience, check the “Show extracted files when complete.” It will open a new Windows Explorer window so you can access the new USG folder to continue the installation.

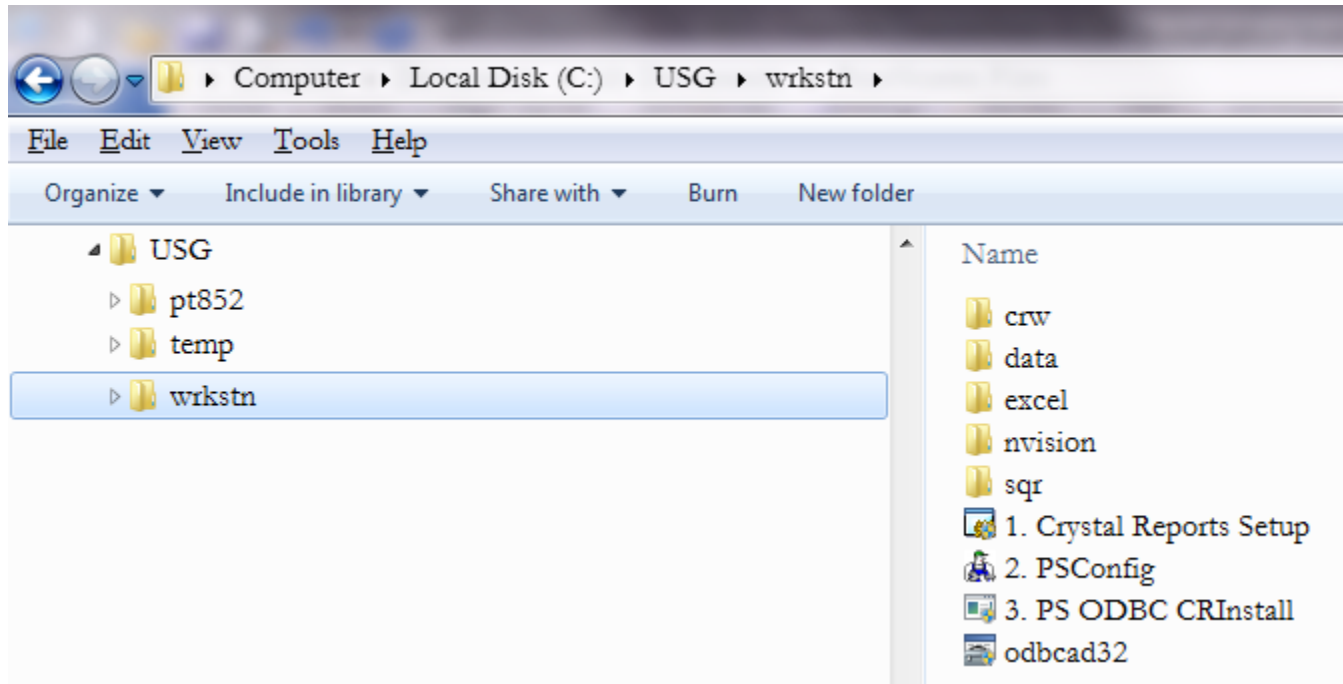
Your screen will probably be slightly different, but it should state that it's copying the files to:
Local Disk (C:)



Install Workstation

When it has finished, if you had checked the “Show extracted files when complete” box, a new Windows Explorer window should have opened.

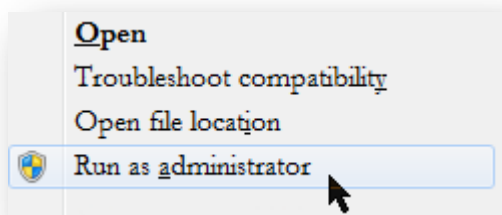
Navigate to the ‘USG’ folder, and then the ‘wrkstn’ folder.



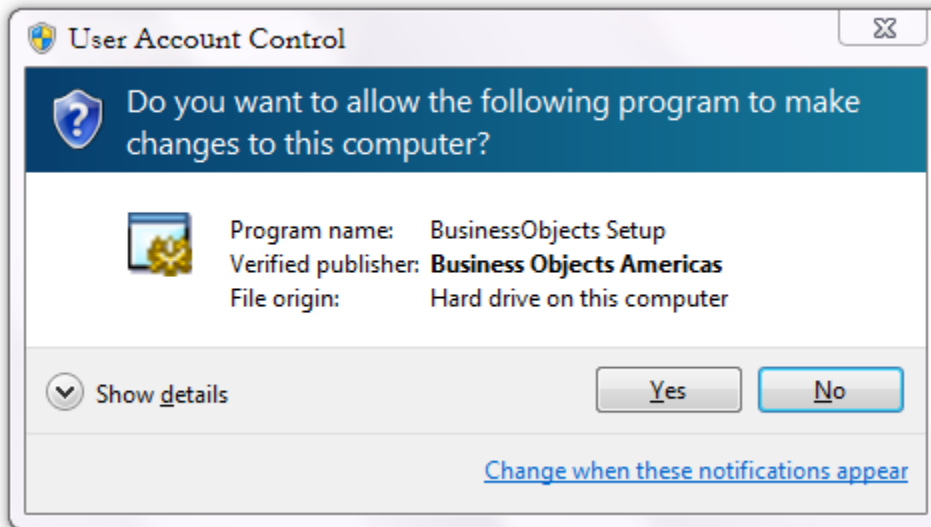
Step 1: Crystal Reports

IMPORTANT NOTE: If you do not need Crystal Reports, you will only need to perform steps 2 & 3. If you plan on using Crystal Reports at any time, please perform all 3 steps.

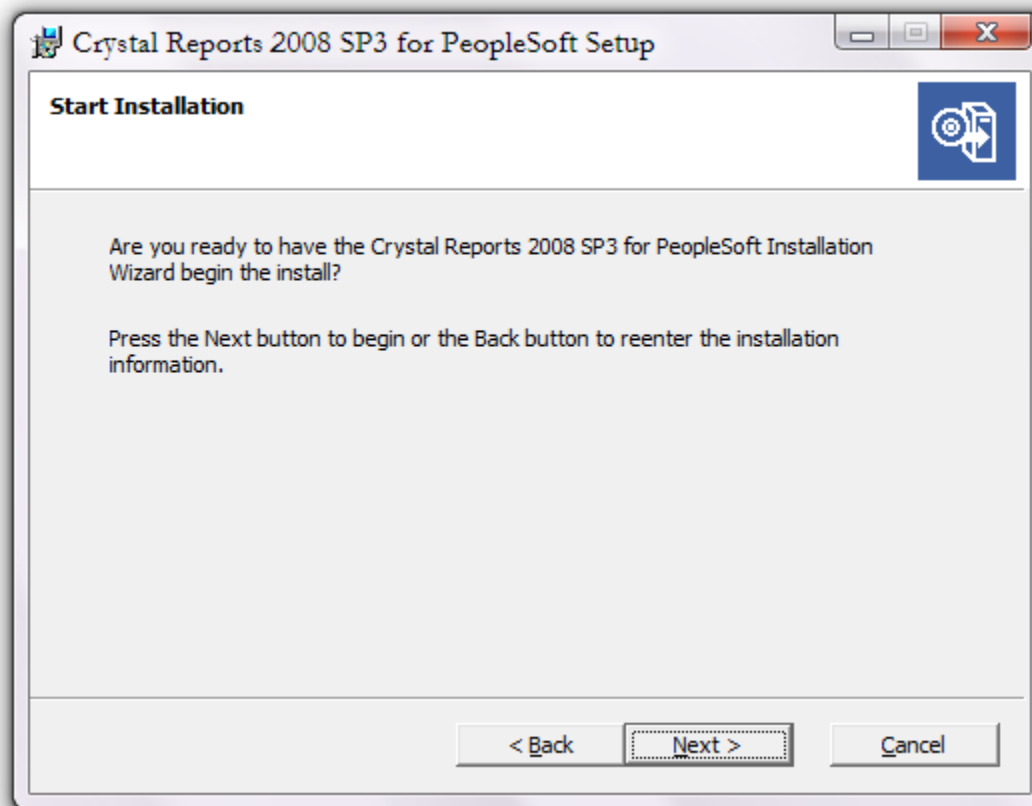
Right click on “1. Crystal Reports Setup” and choose “Run as administrator”.

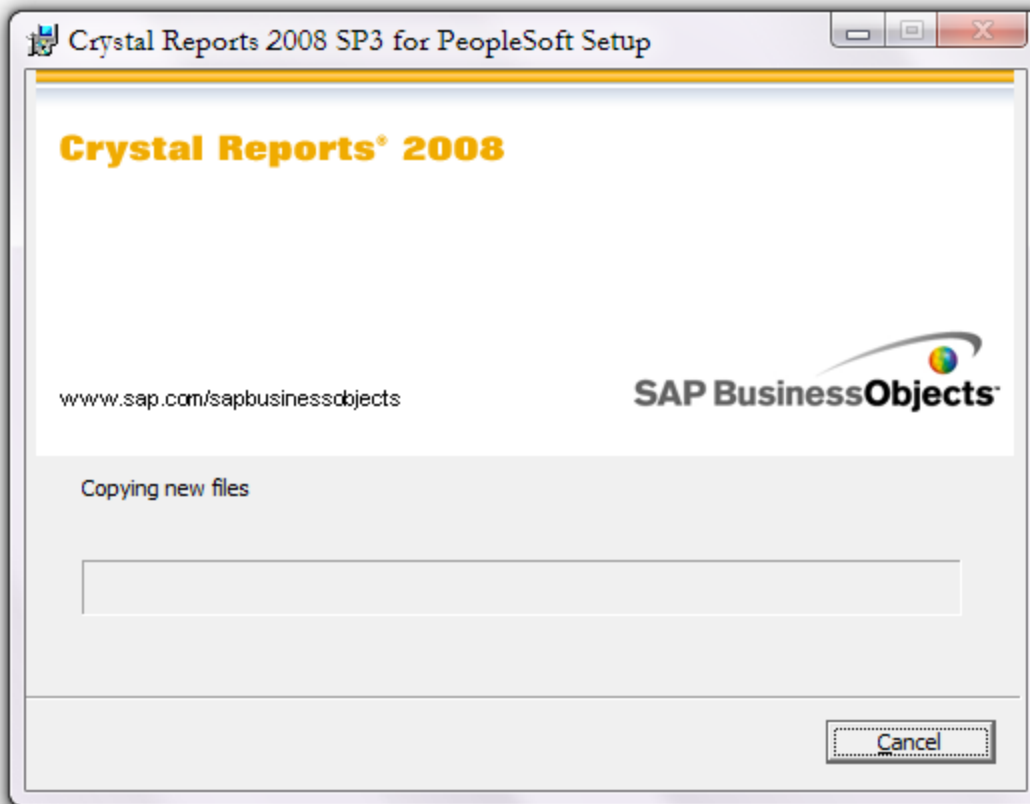


Windows will still request permission to run this install. Please click “Yes”.

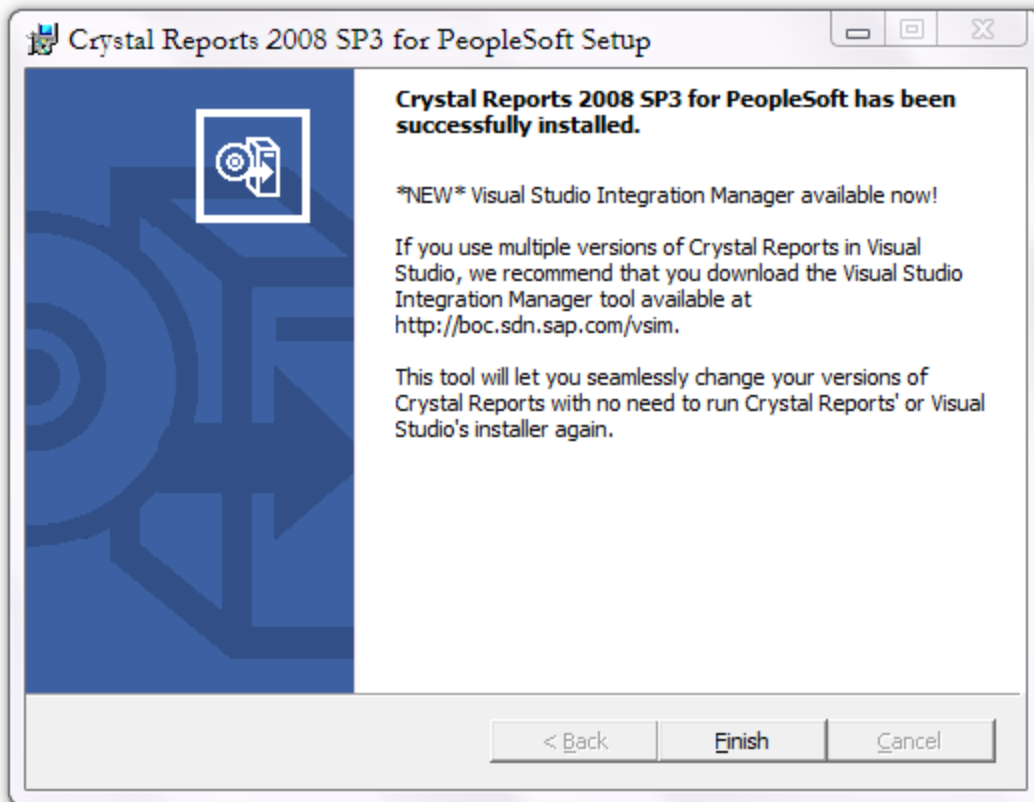


Accept the default values and click “Next” until it starts installing.



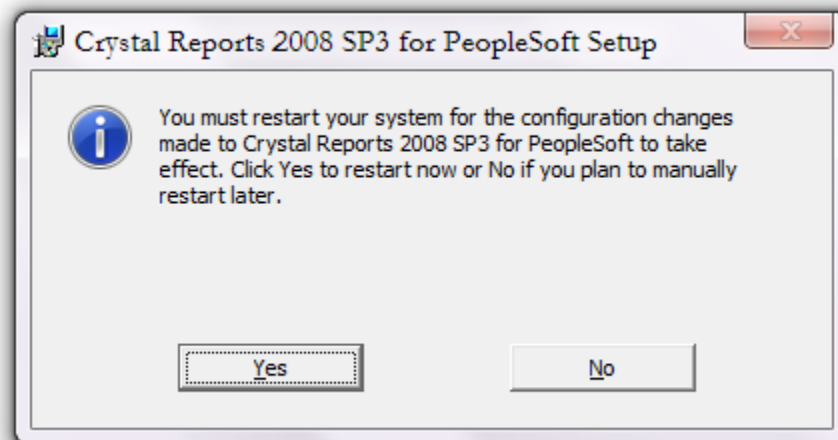


Click “Finish” when it’s done.



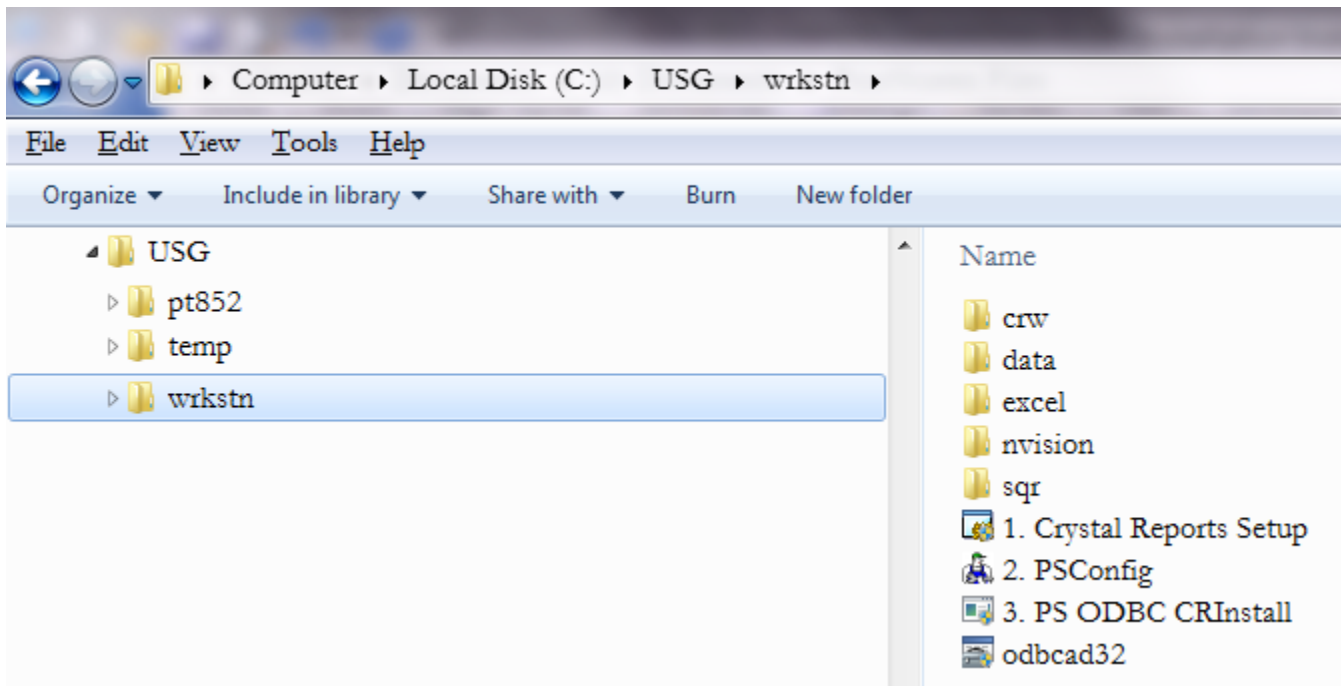
You will receive a warning message that you must restart your computer in order to finish the installation.

You do **not** need to do so at this time – just be aware that before you begin to use Crystal Reports, you will need to restart your computer.

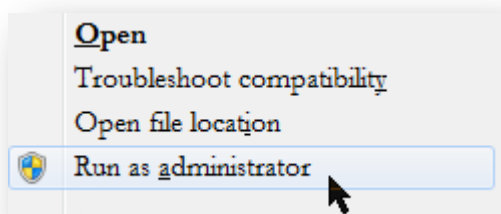


Step 2: PeopleSoft Configuration (nVision)

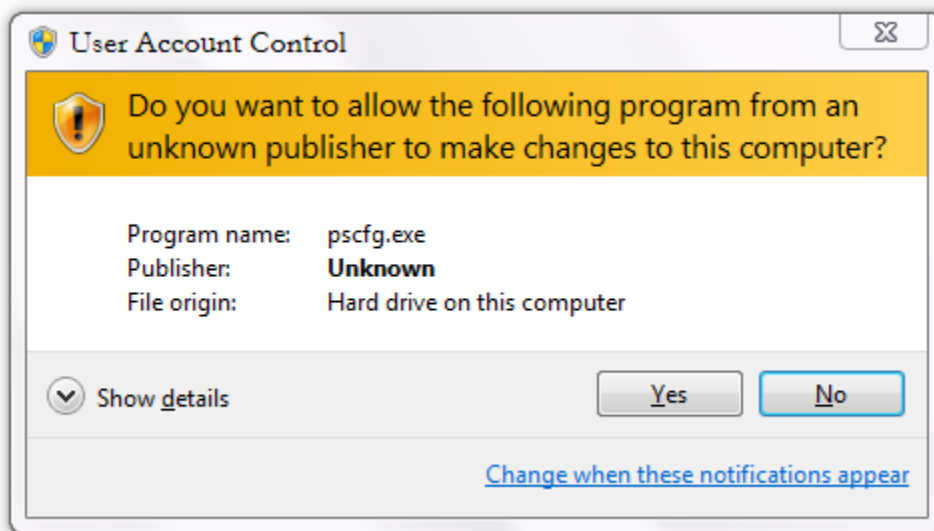
Back in the “wrkstn” folder:



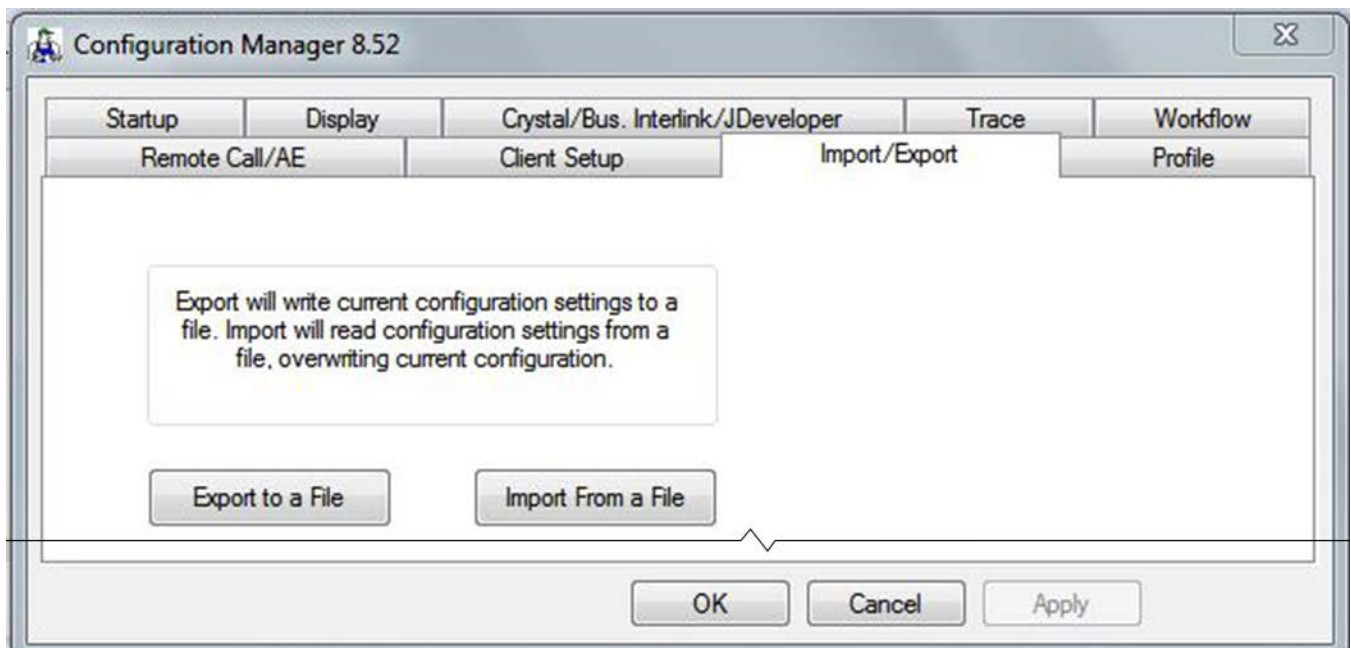
Right click on “2. PSConfig” and choose “Run as administrator”.

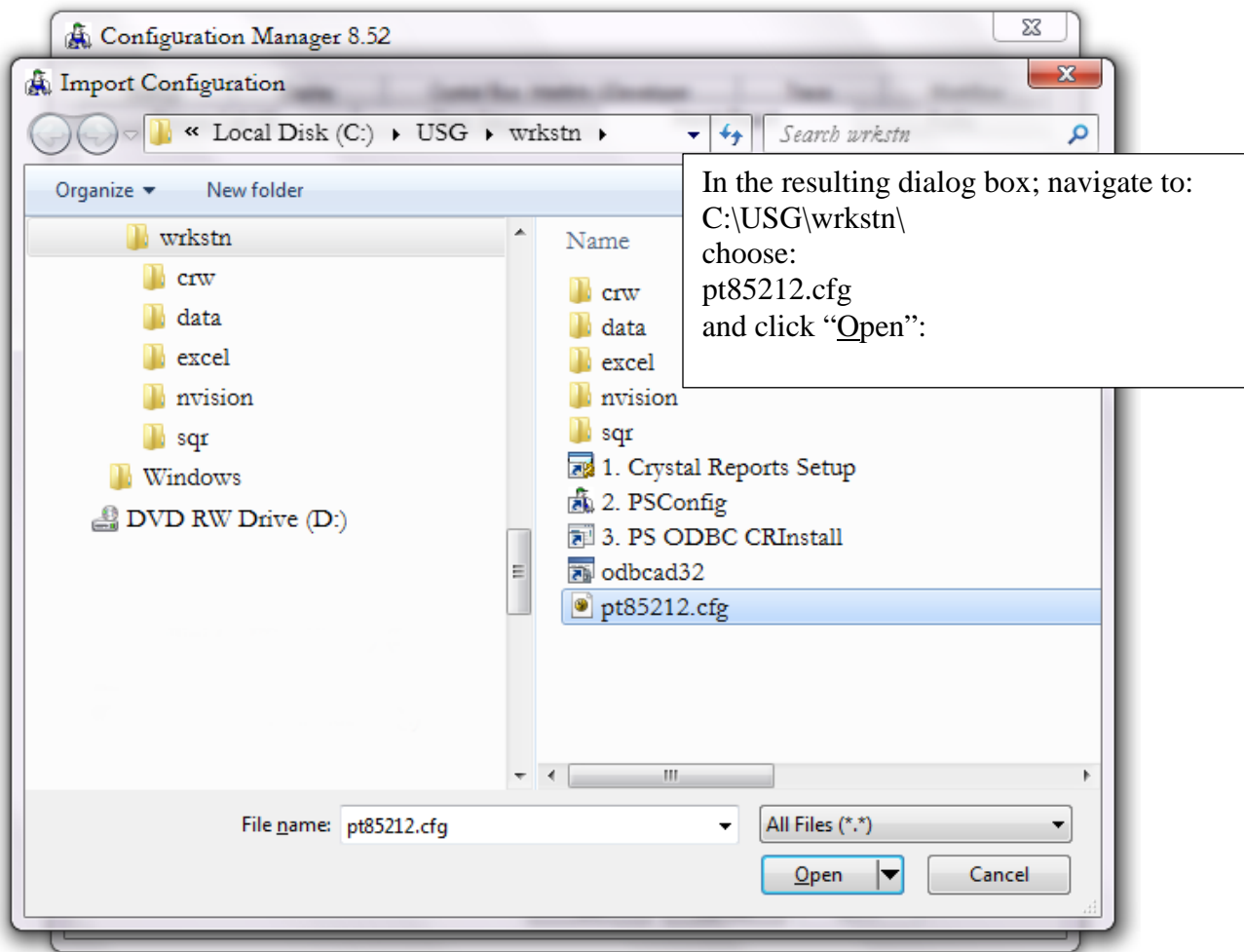


Windows will still request permission to run this program. Please click “Yes”.

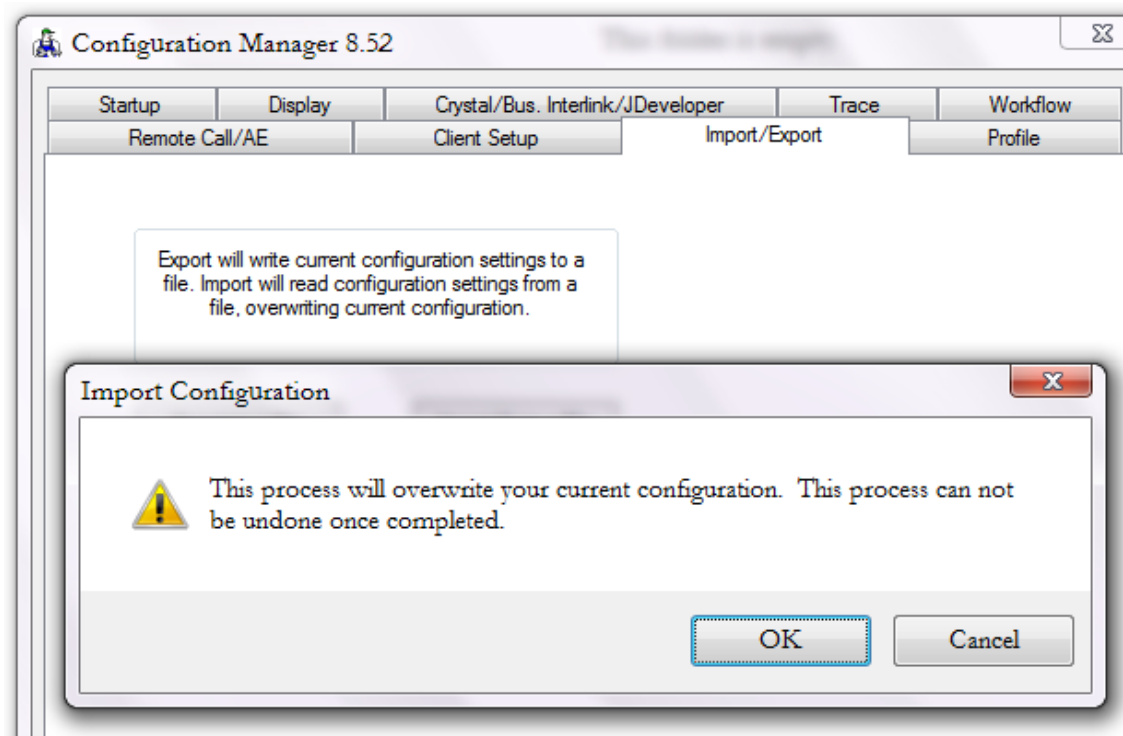


When the Configuration Manager opens; click the “Import/Export” tab; then click the “Import from a File” button (picture not to scale).





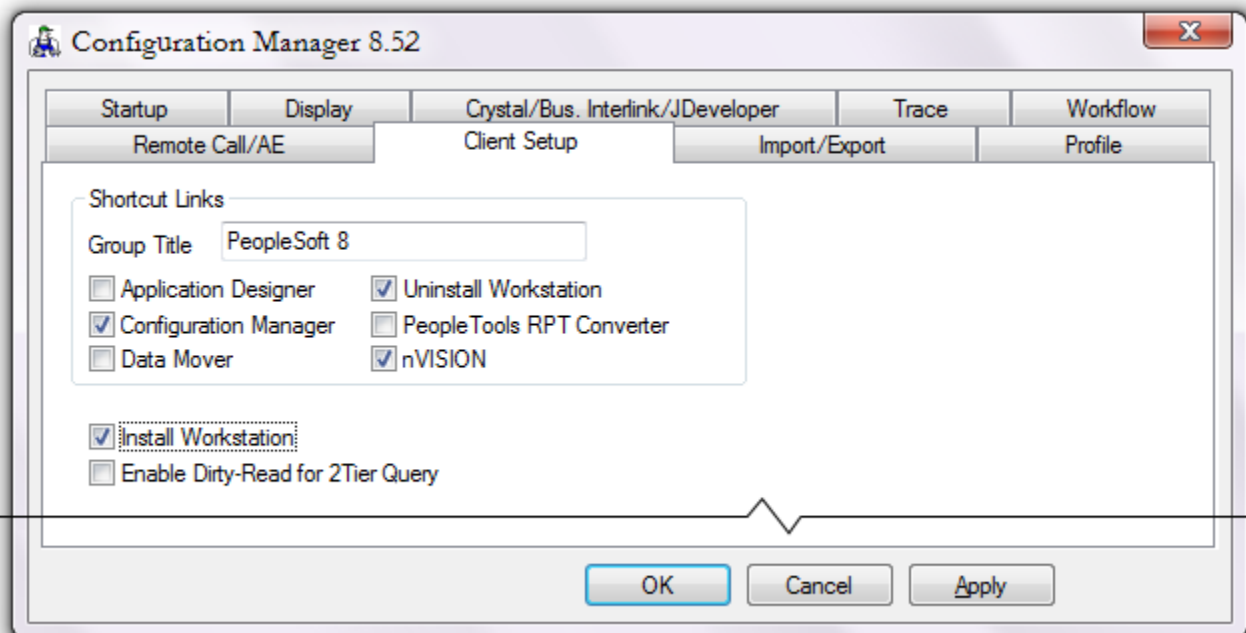
This will generate a warning message.

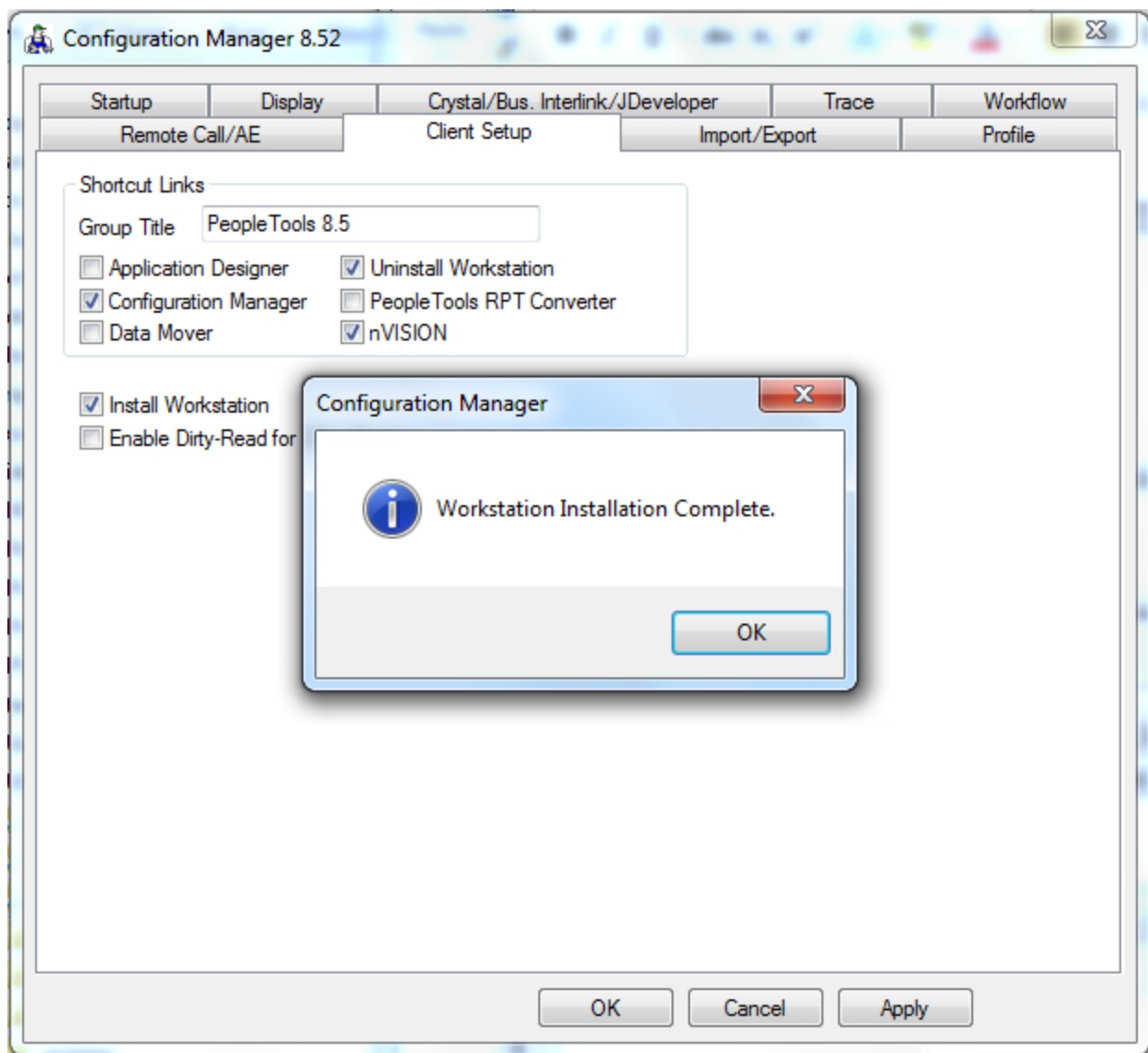


Click “OK”

Change to the “Client Setup” tab, and make sure “Configuration Manager,” “Uninstall Workstation,” “nVISION,” and “Install Workstation” are the only boxes checked.

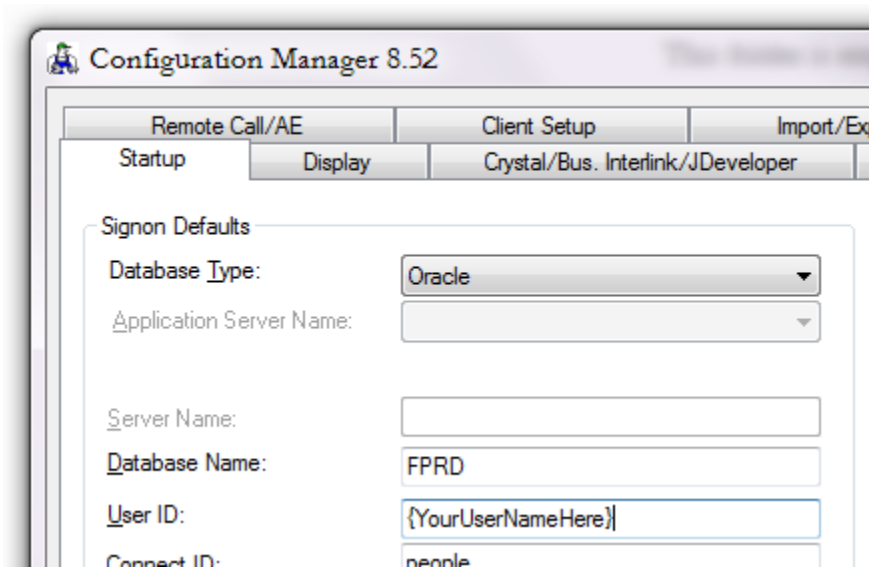
Click “Apply”





Click OK to continue.

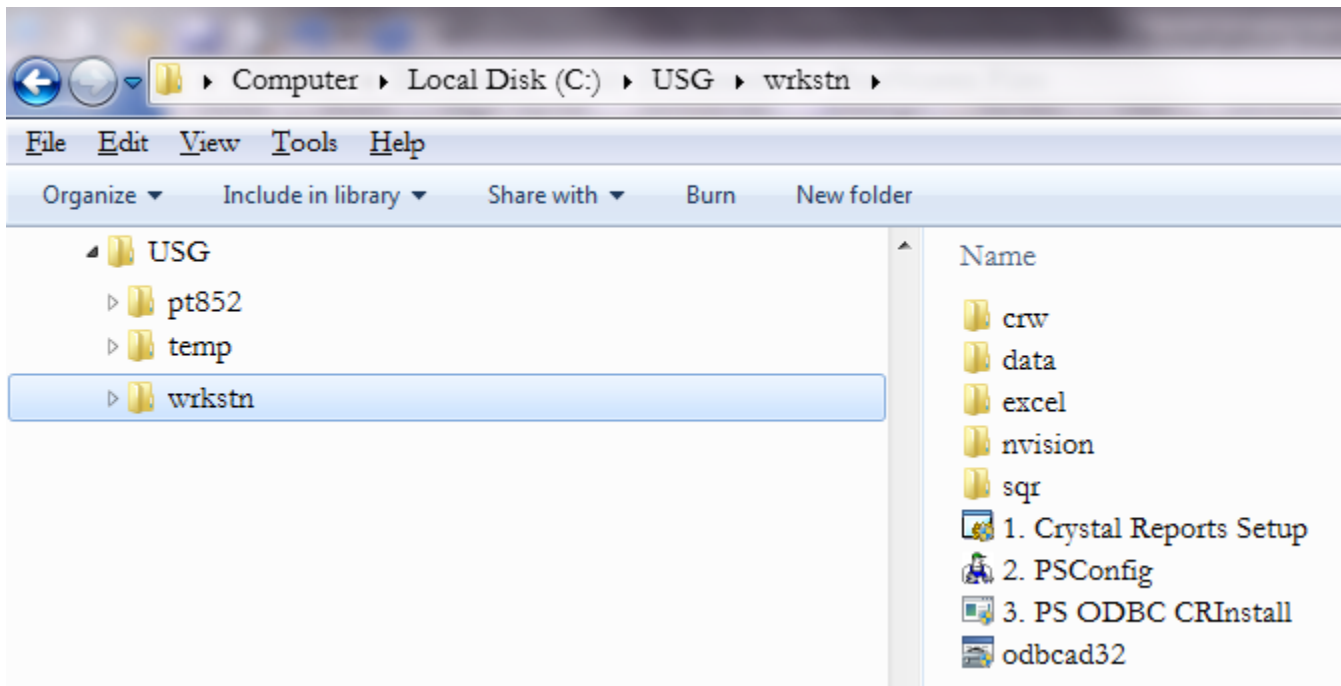
One configuration change you might consider is putting your User ID (aka Operator ID) on the Startup tab.



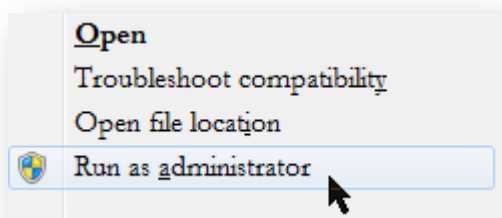
Click “OK” to close the Configuration Manager.

Step 3: PeopleSoft ODBC Driver Installation (psodbccrinst)

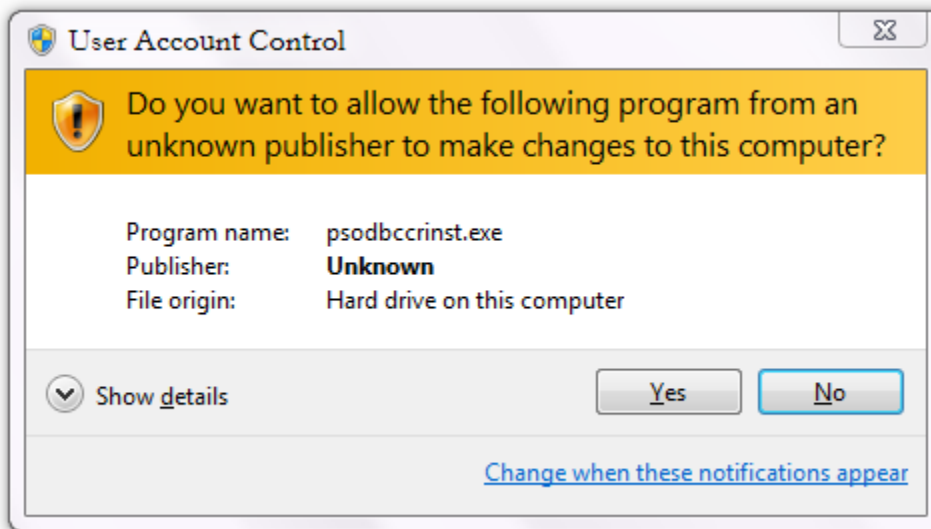
Back in the 'wrkstn' folder:



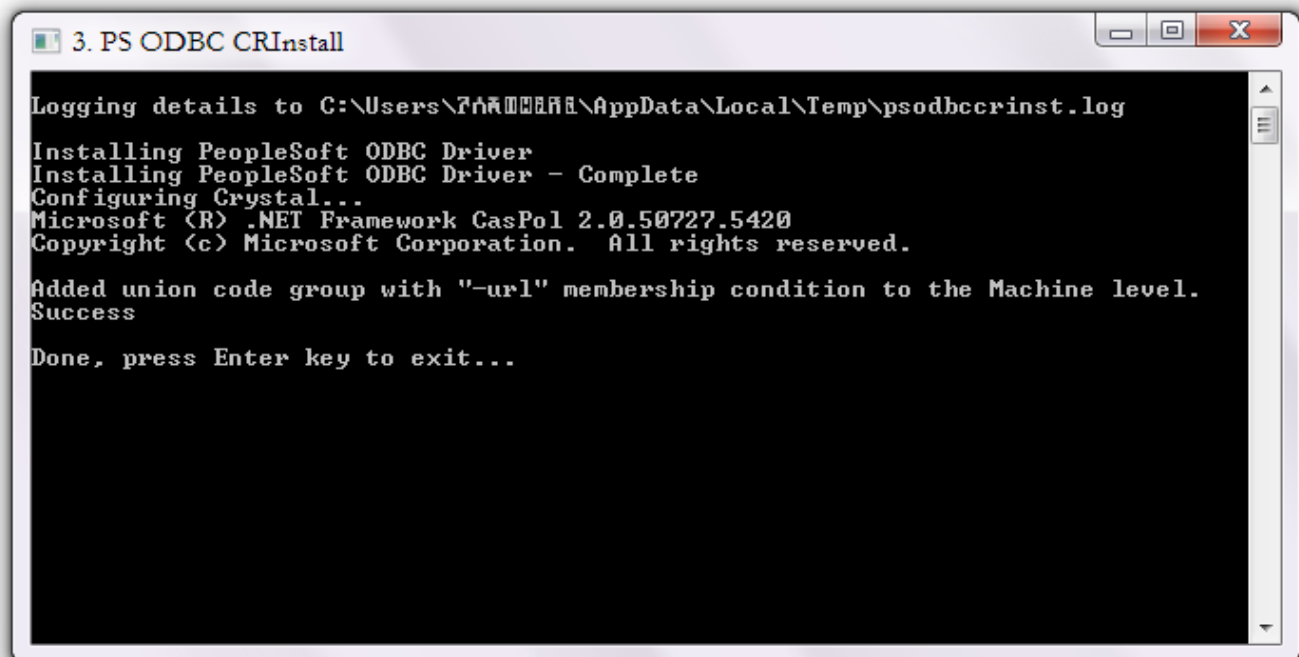
Right click on “3. PS ODBC CRInstall” and choose “Run as administrator.”



Windows will still request permission to run this install. Please click “Yes.”



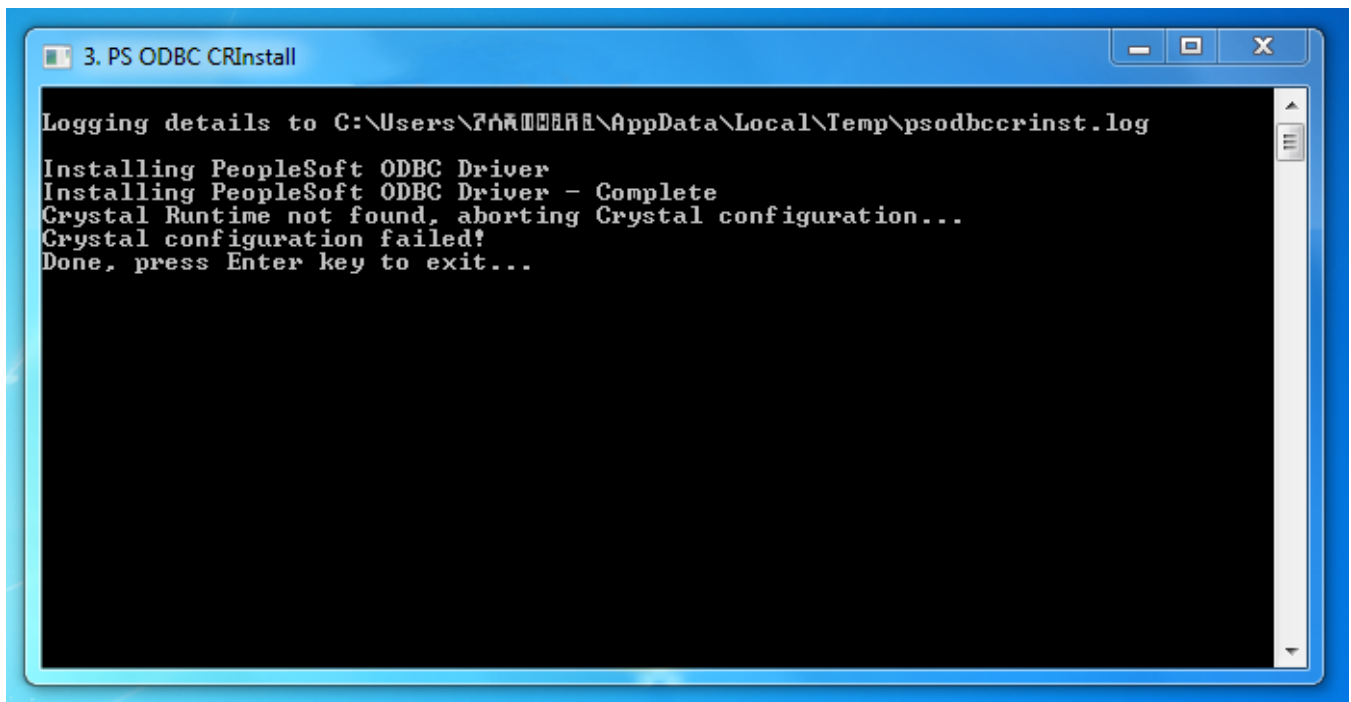
The 'psodbccrinst' will run; and should finish with a window that looks like this:



OR...

If you did not install Crystal Reports at this time, it will display an error. This is normal behavior.

The important “Installing PeopleSoft ODBC Driver – Complete” should be displayed.



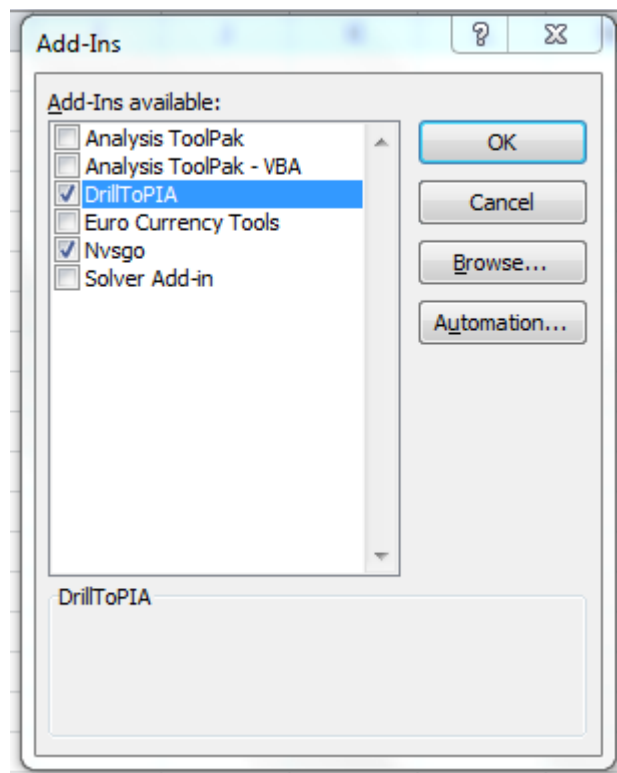
Press the Enter key to close this window.

Step 4: Excel nVision

To load the DrilltoPia.xla add-in to the Excel environment:

For MS-Excel 2007 and 2010:

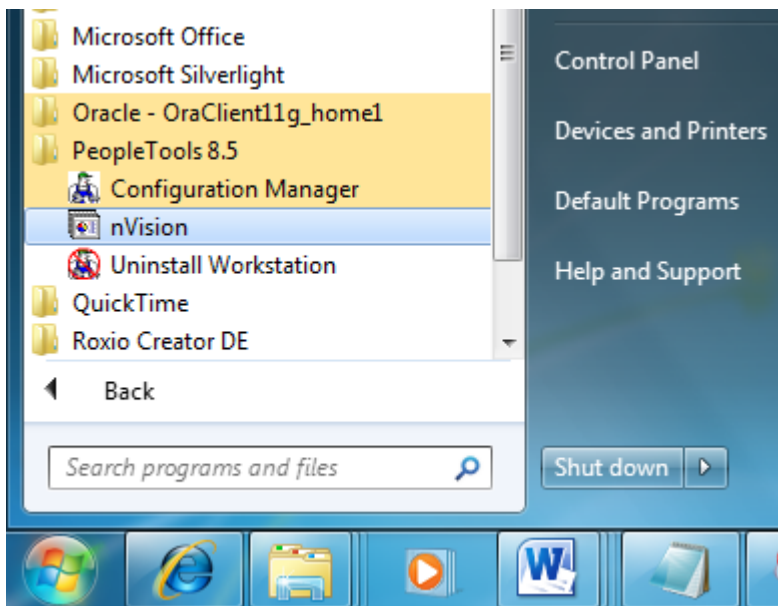
1. Select the <**File**> tab and go into Excel <**Options**>.
2. Select the <**Add-Ins**> entry from the left side menu.
3. At the bottom of the resulting dialog, there is an entry to Manage: "**Excel Add-Ins**". Hit the **Go** button.
4. On the resulting dialog, hit the Browse button and navigate to:
C:\USG\pt852\excel
5. Select the **Drilltopia.xla** add-in and select **ok**.
6. Browse again, and choose **Nvsgo.xla**.



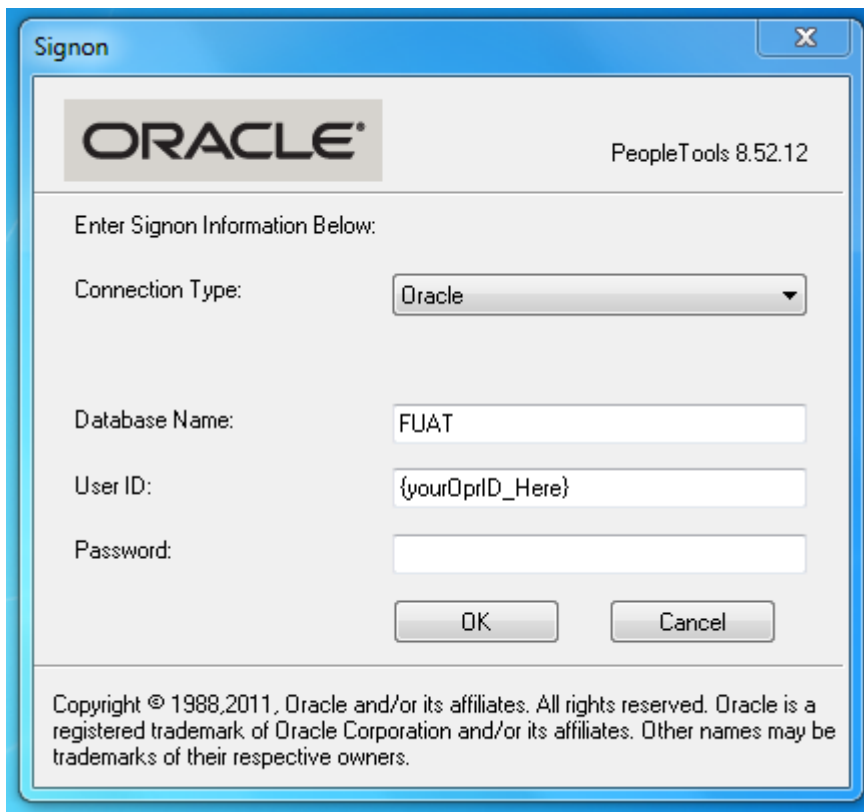
It will return to the dialog, hit Ok and close out of MS-Excel.

Verify Installation

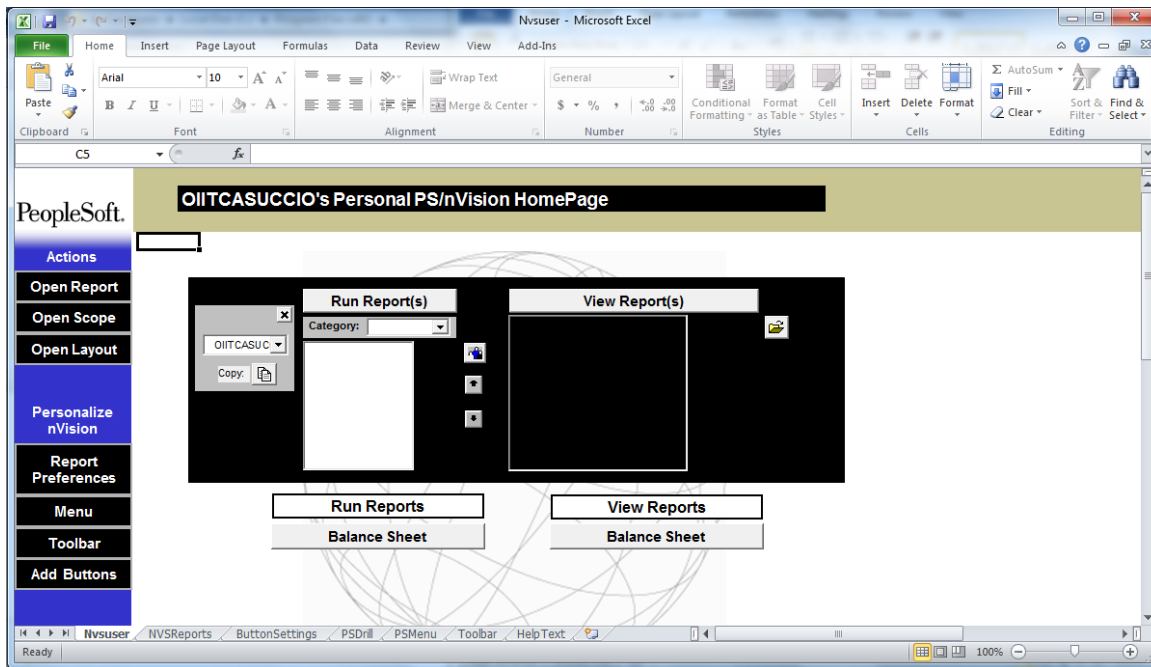
Under the Start button > All Programs > PeopleTools 8.5> nVision:



Login with your User ID and Password.



Click OK to continue.



Navigate to: Start Menu > All Programs > Crystal Reports > Crystal Reports 2008

