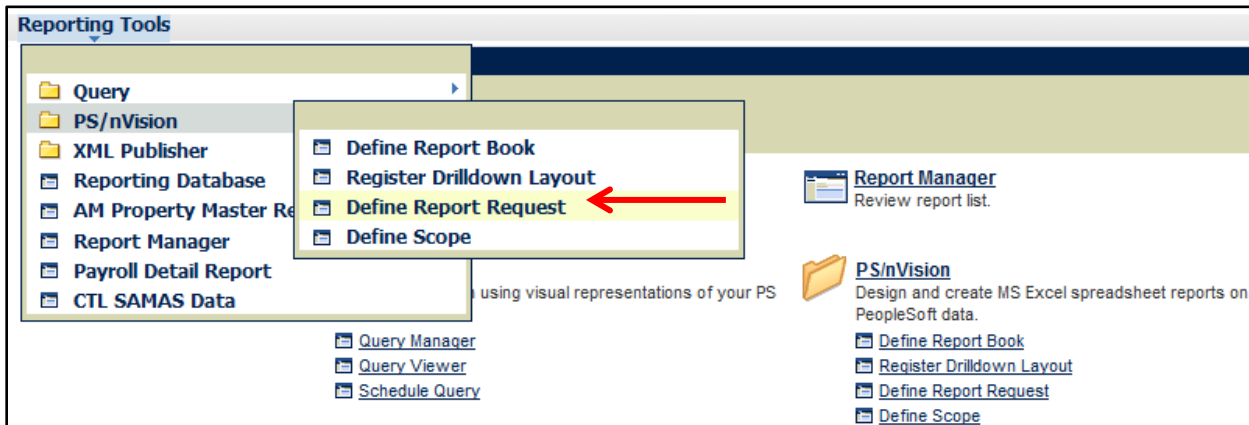


Running nVision Reports in PeopleSoft

Purpose: In this example, user will learn how to run a PS/nVision Detail Transaction (DT) Transdata Report using Layout: DT_Transdata_Budget_Report for an Executive Area.

1. Navigation to Ps/nVision: Reporting Tools> PS/nVision> Define Report Request



2. Click on Find an Existing Value. And enter the following information:

Report Request

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value **Add a New Value**

Limit the number of results to (up to 300):

Business Unit: begins with **a**

Report ID: begins with **b**

Description: begins with

Case Sensitive

[Basic Search](#)

Search Results

Only the first 300 results can be displayed.

[View All](#) First [Last](#)

Business Unit	Report ID	Description
FIU01	DT000100	DT TUITION
FIU01	DT000110	DT FEES FINANCIAL AI
FIU01	DT000111	DT FEES FINANCIAL AI
FIU01	DT000120	DT ACTIV AND SERV FE

c

- Enter the Business Unit: FIU01
 - Enter the Report ID: DT + first 6 digits of deptID
 - Click **Search**
- On the nVision Report Request tab input the following information:
 - Type a Report Title: free form
 - Layout: DT_Transdata_Budget_Report

- f. As of Reporting Date: "As of today"
- g. Click on "Scope and Delivery Templates".

nVision Report Request **Advanced Options**

Business Unit: FIU01 Report ID: DT [Copy to Another Business Unit / Clone](#)

d Title: DT Transdata test [Transfer to Report Books](#)

e *L: DT_TRANSDATA_BUDGET_REPORT [Process Monitor](#)

[Report Manager](#)

[Share This Report Request](#)

Report Date Selection

*As Of Reporting Date: Today's Date **f**

*Tree As Of Date: Use As Of Reporting Date

Override Tree As of Date if Specified in Layout

Output Options

*Type: Web **g** [Scope and Delivery Templates](#)

Format: Microsoft Excel Files (.xls)

Run Report

Save Notify Add Update/Display

- 4. Type in or look up the Activity Nbr or Project on the **Report Scope** field. Then click **OK**.

nVision Web Output

Business Unit: FIU01 Report ID: DT

Report Scope: 1000120004 [Scope Definition](#)

Folder Name:

Retention Days:

Directory Name Template:

Content Description Template: %RTT%

Security Template:

OK Cancel

5. Click Run Report.

nVision Report Request **Advanced Options**

Business Unit: FIU01 Report ID: DT [Copy to Another Business Unit / Clone](#)

Report Title: DT Transdata test [Transfer to Report Books](#)
[Process Monitor](#)

*Layout: DT_TRANSDATA_BUDGET_REPORT [Report Manager](#)
[Share This Report Request](#)

Report Date Selection

*As Of Reporting Date: Today's Date
*Tree As Of Date: Use As Of Reporting Date
 Override Tree As of Date if Specified in Layout

Output Options

*Type: Web [Scope and Delivery Templates](#)
Format: Microsoft Excel Files (.xls)

Run Report

Save Notify Add Update/Display

6. Select PSNT.

Process Scheduler Request

User ID: 1352915 Run Control ID:

Server Name: [Dropdown] Run Date: 09/14/2012 [Calendar Icon]
Recurrence: PSCDB Run Time: 10:30:31AM [Reset to Current Date/Time](#)

Time Zone: PSNT

Process List

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	nVision Rep	NVSRUN	nVision Report	Default	Default

OK Cancel

7. Click on **Save** and then go to **Process Monitor**.

nVision Report Request **Advanced Options**

Business Unit: FIU01 Report ID: DT [Copy to Another Business Unit / Clone](#)

Report Title: DT Transdata test [Transfer to Report Books](#)

*Layout: DT_TRANSDATA_BUDGET_REPORT [Process Monitor](#) [Report Manager](#)

[Share This Report Request](#)

Report Date Selection

*As Of Reporting Date: Today's Date

*Tree As Of Date: Use As Of Reporting Date

Override Tree As of Date if Specified in Layout

Output Options

*Type: Web [Scope and Delivery Templates](#)

Format: Microsoft Excel Files (.xls)

Run Report

Save **Notify** **Add** **Update/Display**

8. Refresh the Process and then click on **Go back to Report Request**.

Process List **Server List**

View Process Request For

User ID: 1352915 Type: Last 2 Hours **Refresh**

Server: Name: Instance: to

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3606899		nVision Report	NVSRUN	1352915	09/14/2012 4:31:16PM EDT	Success	Posted	Details

[Go back to Report Request](#)

9. Click on **Report Manager** to open the report.

nVision Report Request **Advanced Options**

Business Unit: FIU01 Report ID: DT [Copy to Another Business Unit / Clone](#)

Report Title: DT Transdata test [Transfer to Report Books](#)
[Process Monitor](#)

*Layout: DT_TRANSDATA_BUDGET_REPORT [Report Manager](#)
[Share This Report Request](#)

Report Date Selection

*As Of Reporting Date: Today's Date
*Tree As Of Date: Use As Of Reporting Date
 Override Tree As of Date if Specified in Layout

Output Options

*Type: Web [Scope and Delivery Templates](#)
Format: Microsoft Excel Files (.xls)

Run Report

Save Notify Add Update/Display

10. Go to the **Administration Tab**, and click on the report link under the Description section.

List Explorer **Administration** Archives

View Reports For

User ID: 1352915 Type: Last Filter Value: 1 Days Refresh

Status: Folder: Instance: to:

Select	Report ID	PrCs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	3495997	36068	DT_TRANSDATA Test	09/14/2012 11:22:33AM	Microsoft Excel Files (*.xls)	Posted	Details

1. Enable Content and click "Yes".

Security Warning Macros have been disabled. [Enable Content](#)

B14 Expenses

DT [Read-Only] [Compatibility Mode]

	B	C	D	E	F
2					
3					
4					
5	Budget Period	2013			
6	Period	(All)			
7	Budget type	(All)			
8	Fund	(All)			
9					
10	Sum of Amount R		Column Labels		
11	Row Labels		Budget	Expenses/Revenues	Balance
12	100001000 - Office Of The President				
13	1000120004 - BOARD OF TRUSTEES	\$35,000.00		(\$510.48)	\$34,489.52
14	Expenses	\$35,000.00		(\$510.48)	\$34,489.52
15	Operating Capital Outlay	\$1,200.00			\$1,200.00
16	Operating Capital Outlay	\$1,200.00			\$1,200.00
17	Other Operating Expenses	\$33,800.00		(\$510.48)	\$33,289.52
18	Materials and Supplies	\$16,000.00		(\$46.44)	\$15,953.56
19	Other Equipment and Supplies	\$500.00			\$500.00
20	Postage	\$5,400.00		(\$109.93)	\$5,290.07
21	Pro Serv/Officials/Advertising	\$6,000.00			\$6,000.00
22	Telephone Equipment	\$3,700.00		(\$354.11)	\$3,345.89

PivotTable Field List

Choose fields to add to report:

- DeptID
- Department
- DeptID - Descr
- Project
- Activity Nbr
- CF 1 Descr
- Activity Nbr - Descr
- Cost PID
- CF2 Descr
- Amount
- Account

Drag fields between areas below:

Report Filter: Budget Pe..., Period, Budget type


Column Labels: Ledger

Row Labels: DeptID -..., Activity N..., Rollup3

Σ Values: Sum of Amou...

Defer Layout Update [Update](#)

Security Warning

 **Do you want to make this file a Trusted Document?**

This file is on a network location. Other users who have access to this network location may be able to tamper with this file.

[What's the risk?](#)

Do not ask me again for network files

[Yes](#) [No](#)