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## Deleting nVision Reports Overview

PS nVision is a PeopleTools software that you use to design and create Microsoft Excel spreadsheet reports for PeopleSoft data.

UW nVision is a customized interface that allows users to quickly and easily find, and then run reports in SFS. It also allows users to include run time prompts in their reports.

<b>Process Frequency</b>	Used on an ad hoc basis.
<b>Dependencies</b>	Knowledge of PS/nVision and UW nVision tools.
<b>Assumptions</b>	N/A
<b>Responsible Parties</b>	N/A
<b>Alternate Scenarios</b>	N/A

## Process Detail

### I. Gathering information

1. Determine the *Report ID*, *Category* and *Sub Category* (if ran in UW nVision bolt on), of the report to be deleted
2. **Identify** the *report layout(s)* which you will no longer need and **notify** problemsolvers that the layout should be deleted from the production drives. Email: [uwsaproblemsolvers@maillist.uwsa.edu](mailto:uwsaproblemsolvers@maillist.uwsa.edu) to have the report layout(s) deleted.

## II. Deleting the Report from UW nVision and PS/nVision

1. The sample report below belongs to the 'TAX' *Category* and 'GENERAL' *Sub Category* in UW nVision.

UW Nvision Report Request Selection Center

\*Report List

**Categories**

\*Category:  Tax related reports

\*Sub Category:  General Reports

**Report List** Personalize | Find | First 1-2 of 2 Last

	Report ID	Description	Parameters	Favorite	Help
	FND904TB	Fund 904 Trial Balance	<input type="checkbox"/>	<input type="checkbox"/>	
	TESTING	test description	<input type="checkbox"/>	<input type="checkbox"/>	

2. **Navigate** to *Reporting Tools > PS/nVision > Define Report Request*. You should see the following screen

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Favorites Main Menu > Reporting Tools > PS/nVision > Define Report Request

### 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

Search Criteria

Business Unit: begins with UWSYS

Report ID: begins with TESTING

Description: begins with

Case Sensitive

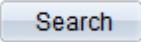
Search Clear Basic Search Save Search Criteria

### Search Results

View All First 1-3 of 3 Last

Business Unit	Report ID	Description
UWSYS	TEST	test
UWSYS	TEST22	(blank)
UWSYS	TESTING	This is my test report

Find an Existing Value | Add a New Value

3. Enter the *Business Unit* from which the report originates and the specific *Report ID*
4. Click 
5. Click the appropriate report line hyperlink.

The screenshot shows the 'Define Report Request' page in the nVision system. The breadcrumb trail is 'Reporting Tools > PS/nVision > Define Report Request'. The page has three tabs: 'nVision Report Request' (selected), 'Advanced Options', and 'Query Prompts'. The main form contains the following fields and options:

- Business Unit:** UWSYS **Report ID:** TESTING. A link 'Copy to Another Business Unit / Clone' is next to it.
- Report Title:** This\_is\_my\_test\_report. A link 'Delete This Report Request' is circled in yellow.
- \*Layout:** TEST\_LAYOUT.XNV. Other links include 'Transfer to Report Books', 'Process Monitor', 'Report Manager', and 'Share This Report Request'.
- Report Date Selection:** Includes dropdowns for '\*As Of Reporting Date' (Today's Date) and '\*Tree As Of Date' (Use As Of Reporting Date), with a checked checkbox for 'Override Tree As of Date if Specified in Layout'.
- Output Options:** Includes dropdowns for '\*Type' (Web) and '\*Format' (Microsoft Excel Files (\*.xls)). A link 'Scope and Delivery Templates' is also present.

At the bottom, there are buttons for 'Run Report', 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'. A breadcrumb trail at the very bottom reads 'nVision Report Request | Advanced Options | Query Prompts'.

6. If this is the correct report request to delete, **click** the *Delete This Report Request* link.

The screenshot shows a 'Message' dialog box with the following text: 'Are you sure you want to delete Report Request UWSYS TESTING? (28,175)'. At the bottom of the dialog are three buttons: 'Yes' (circled in yellow), 'No', and 'Cancel'.

7. Your report should no longer exist in either UW nVision (bolt on) or PS/nVision
8. Once your report has been deleted, you should no longer find it in the *Report Request Search* under *Reporting Tools > PS/nVision > Define Report Request*.

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Favorites Main Menu > Reporting Tools > PS/nVision > Define Report Request

### 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

Search Criteria

Business Unit: begins with JWSYS

Report ID: begins with TESTING

Description: begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

No matching values were found.

9. If you search at *UW nVision > nVision Report Submit Center*, you will also see that your report has been deleted from the 'TAX' Category and the 'GENERAL' Sub Category, too.

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Favorites Main Menu > UW nVision > nVision Report Submit Center

### UW NVision Report Request Selection Center

\*Report List Category / SubCategory List Refresh

Categories

\*Category: TAX Tax related reports

\*Sub Category: GENERAL General Reports

Report ID	Description	Parameters	Favorite	Help
FND904TB	Fund 904 Trial Balance	<input type="checkbox"/>	<input type="checkbox"/>	

## Revision History

Author	Version	Date	Description of Change
Stacy VanWormer	1.0	08/13/13	Initial Draft
Susan Kincanon	1.1	08/19/2013	Review, edit, and format
Scott Larson	1.2	08/20/2013	Review, edit, and format
Susan Kincanon	1.3	08/26/2013	Finalize and publish