Running nVision Reports Process Overview

The UW nVision (bolt-on) Report Submit Center is a user friendly way to run reports in SFS.

<table>
<thead>
<tr>
<th>Process Frequency</th>
<th>This process is performed on an “as needed” basis.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dependencies</td>
<td>A related layout must exist prior to running an nVision report.</td>
</tr>
<tr>
<td>Assumptions</td>
<td>None</td>
</tr>
<tr>
<td>Responsible Parties</td>
<td>All registered users of nVision.</td>
</tr>
<tr>
<td>Alternate Scenarios</td>
<td>None</td>
</tr>
</tbody>
</table>

Process Detail

I. Report Selection

Navigation: UW nVision> nVision Report Submit Center

SFS_RPT.1.04_Running_nVision_Reports_on_the_Web.docx  1 of 8
1. **Select** *Report List:* ‘Category / SubCategory List’ from pull down menu.

2. **Enter or search** *Category.*

3. **Enter or search** *Sub Category.*

4. If this is a report that will be run frequently, **check** the *Favorite* box.

5. **Click** on the icon to the left of the report ID you would like to run. This will bring up the parameters that need to be entered.

**II. Run Control Parameters**

Run control parameters are used to choose specific data for your report and can be used and altered many times without changing the configuration of the report itself.
1. In the Run Control Parameter Entry section, **enter or search** `Business Unit:' UW***'. **Enter** any other parameters that are required.

2. **NOTE:** For Business Unit specific reports, there may be no run control or parameters to submit. Steps 1 and 2 may be omitted. If this is the case, you will be taken to the UW nVision **Report Request** screen.

3. **Click** the **Submit Parameters** hyperlink and the UW nVision Report Request Page will appear.

### III. Report Request

The report request is used to change the configuration of the report. These are advanced settings and in most cases, the fields here will not need to be altered from the way the report is normally run.
1. If scope is set up for this report, a scope selection will be seen. To **choose** a different scope for this report, **search** and **select** new scope.
2. In the Report Date Selection section, choose an As Of Reporting Date option from the pull down menu. If choosing the value ‘Specify’, enter your specified date in the date field to the immediate right. For the other 3 options, the date field is eliminated.

3. In the Output Options section, select Type: ‘Window’ or ‘Web’ from the pull down menu. The ‘Window’ option will run the report to a new window. The ‘Web’ option will place the report in the Report Manager. The default format is Microsoft Excel.

IV. Running the Report

1. Click on the Run Report hyperlink to start the report. If you are running the report to the ‘Window’, a new window will appear that looks like this:
2. The “Queued” message will change to “Processing”, then to “Success” when the report has run to completion. Depending on your browser settings, you may see the following message:

![Queued screenshot](image1)

**Queued**

- Process Name: NVSRUN
- Process Instance: 6128179
- Process Type: nVision Report

3. **Click** on the popup message.

![Success screenshot](image2)

**Success**

**Preparing output for viewing**

- Process Name: NVSRUN
- Process Instance: 6128179
- Process Type: nVision Report
4. **Select Download File.** The nVision report will open in a new window as an Excel spreadsheet.

5. You will have the option to **Open** the file or **Save** it.

6. If you have scheduled the report to run to the Report Manager, by choosing the ‘Web’ output option type, you will see the following message:
7. **Click**
8. **Click** the Report Manager link on the screen to view your report.

### UW nVision Report Request

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Report ID</th>
<th>Description</th>
<th>nVision Layout</th>
</tr>
</thead>
<tbody>
<tr>
<td>UWADM</td>
<td>AP_VCHR1</td>
<td>List of vouchers by Inv Number</td>
<td>UW_03_BOLT_AP_VCHR_P_INVOICE_ID</td>
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</table>

### Scope Selection

- Process Monitor
- Report Manager
- Run Report

### Revision History

<table>
<thead>
<tr>
<th>Author</th>
<th>Version</th>
<th>Date</th>
<th>Description of Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Martha Mendoza</td>
<td>1.0</td>
<td>12/17/2012</td>
<td>Initial Draft</td>
</tr>
<tr>
<td>Stacy VanWormer</td>
<td>1.1</td>
<td>06/25/2013</td>
<td>Revision</td>
</tr>
<tr>
<td>Susan Kincanon</td>
<td>1.2</td>
<td>06/26/2013</td>
<td>Final review, edit, and format</td>
</tr>
<tr>
<td>Scott Larson</td>
<td>1.3</td>
<td>06/28/2013</td>
<td>Final team review</td>
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<tr>
<td>Susan Kincanon</td>
<td>1.4</td>
<td>06/28/2013</td>
<td>Publish to website</td>
</tr>
<tr>
<td>Susan Kincanon</td>
<td>1.5</td>
<td>09/16/2013</td>
<td>Republished after nVision style sheet update to page 2</td>
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