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I. How to Change Where nVision Report Output (Instance) is Directed Overview

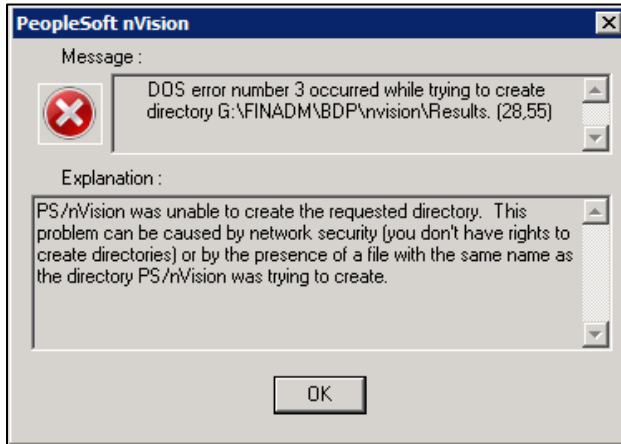
This document describes how to define, update or correct the Directory Filepath on nVision Report Requests. The Directory Filepath field is used to define where to send or place nVision Report Instances. The Instance is the Report in excel format.

II. Updating the Directory Template in nVision Client Report Request

The directory template field allows nVision users to define and save reports to a specified drive location or folder when the report is run. Use of the Remote App connection to the nVision client, may require the filepath for existing reports to be updated so reports are saved properly.

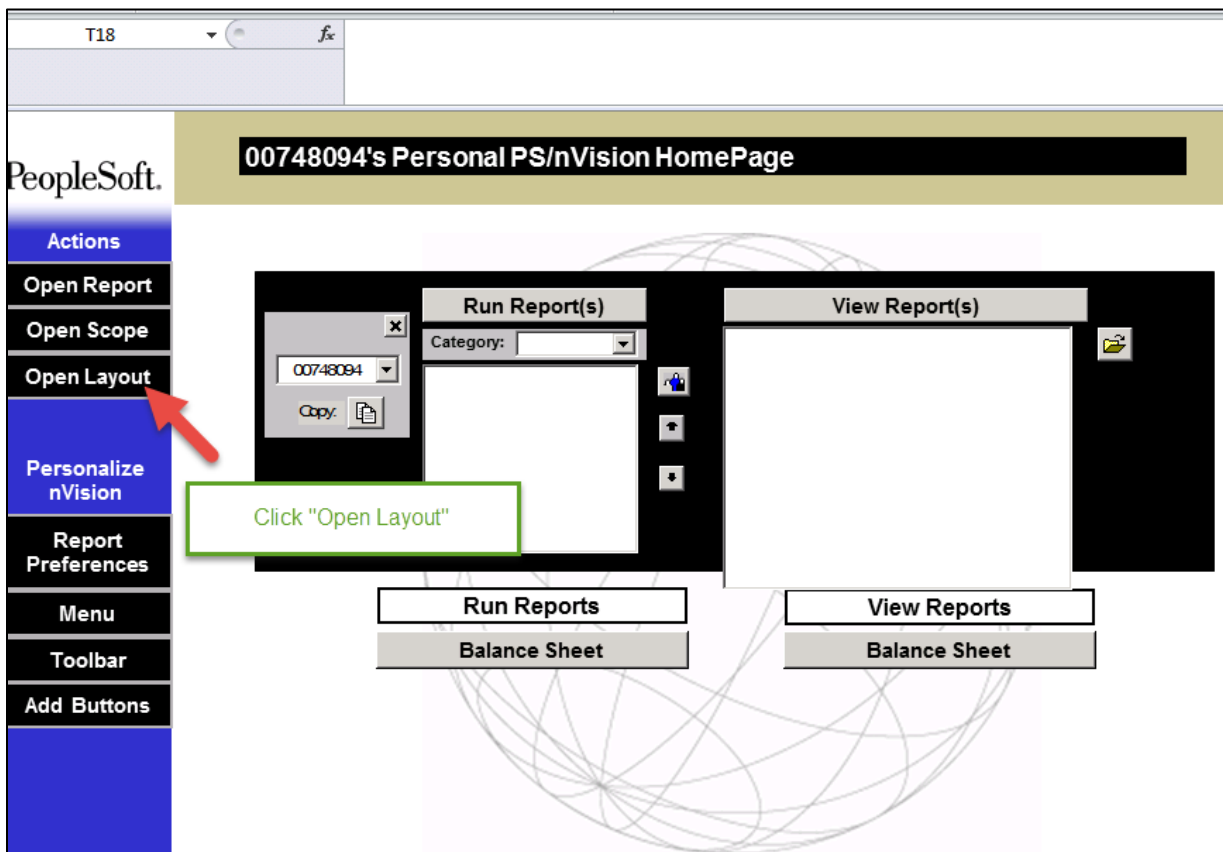
The screenshot shows the 'PeopleSoft nVision Report Request' dialog box. It contains several input fields and buttons. A red arrow points to the 'Directory Template' field, which contains the text '\\tsclient\G\FINADM\SVV\nVision\Output'. Other fields include 'Request ID', 'Request Name' (TESTING), 'Report Title' (testing testing), 'Requesting Business Unit' (UWADM), 'Layout' (UWadm_88_PO_ADJ_ENC_BA), 'Scope', 'File Template' (%RID%), and 'Language Template'. Buttons on the right include OK, Cancel, Run, New, Open, Save, and Delete.

Also, you may receive a similar error if you run a report with an **old/invalid** filepath:



III. Instructions on How to Set Up or Update the Filepath in Report Request

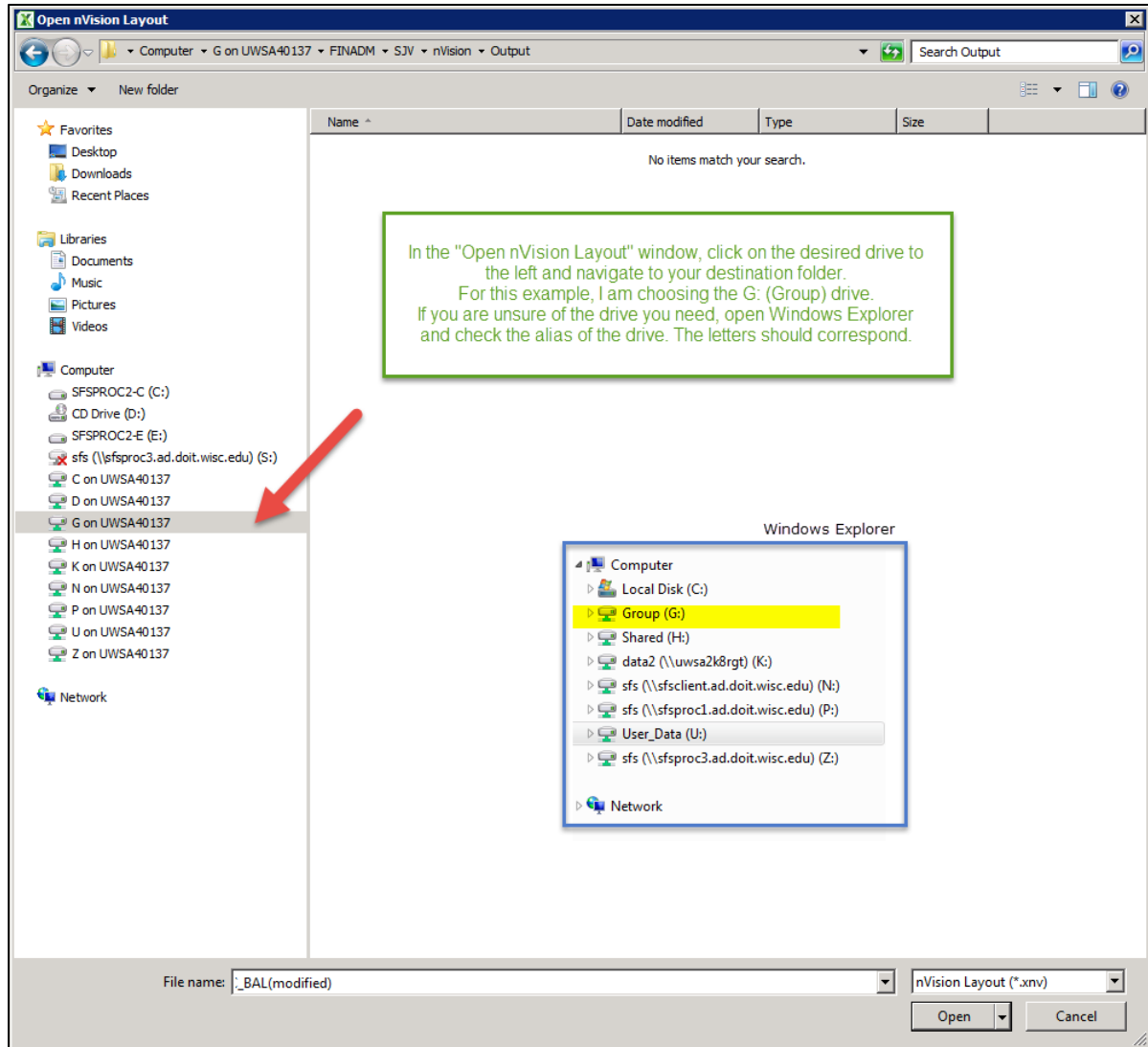
1. In the nVision client window, click "Open Layout".



University of Wisconsin System SFS Business Process

Change Where Your Report Output is Directed in SFS 9.2 nVision

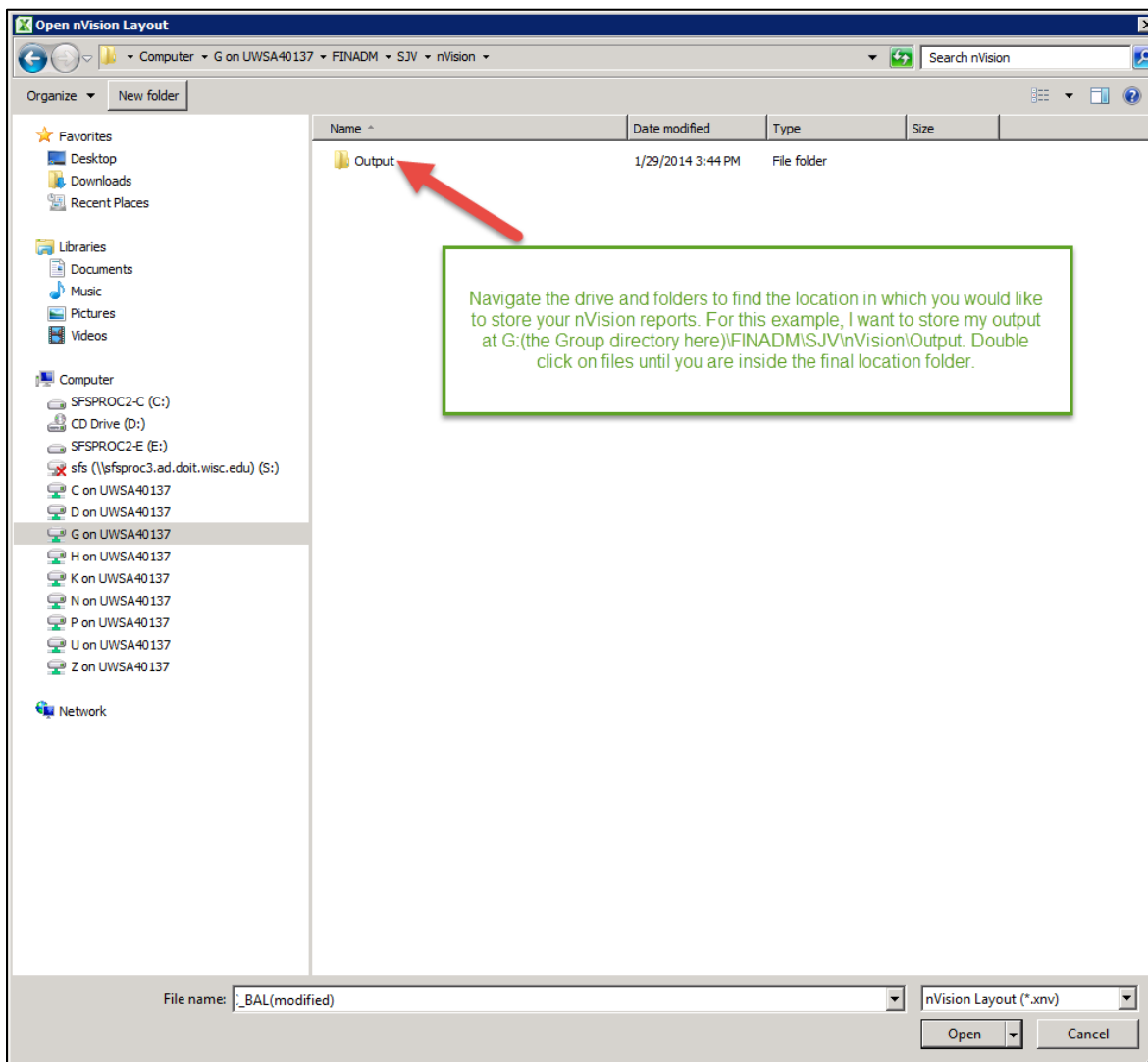
2. Find the appropriate drive/network path for your files.



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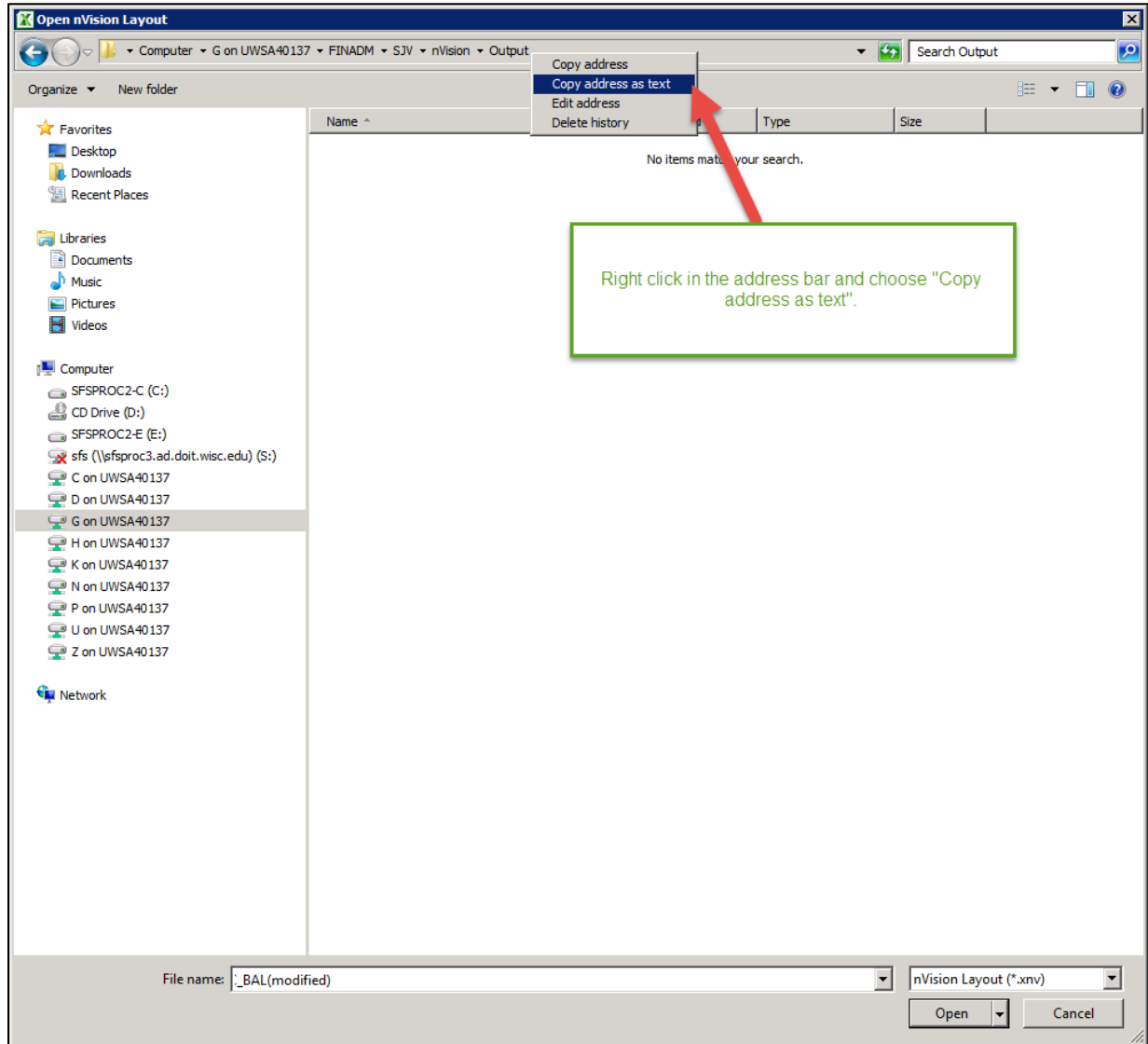
Change Where Your Report Output is Directed in SFS 9.2 nVision

3. Navigate to the location/folder in which you would like to store your report output.



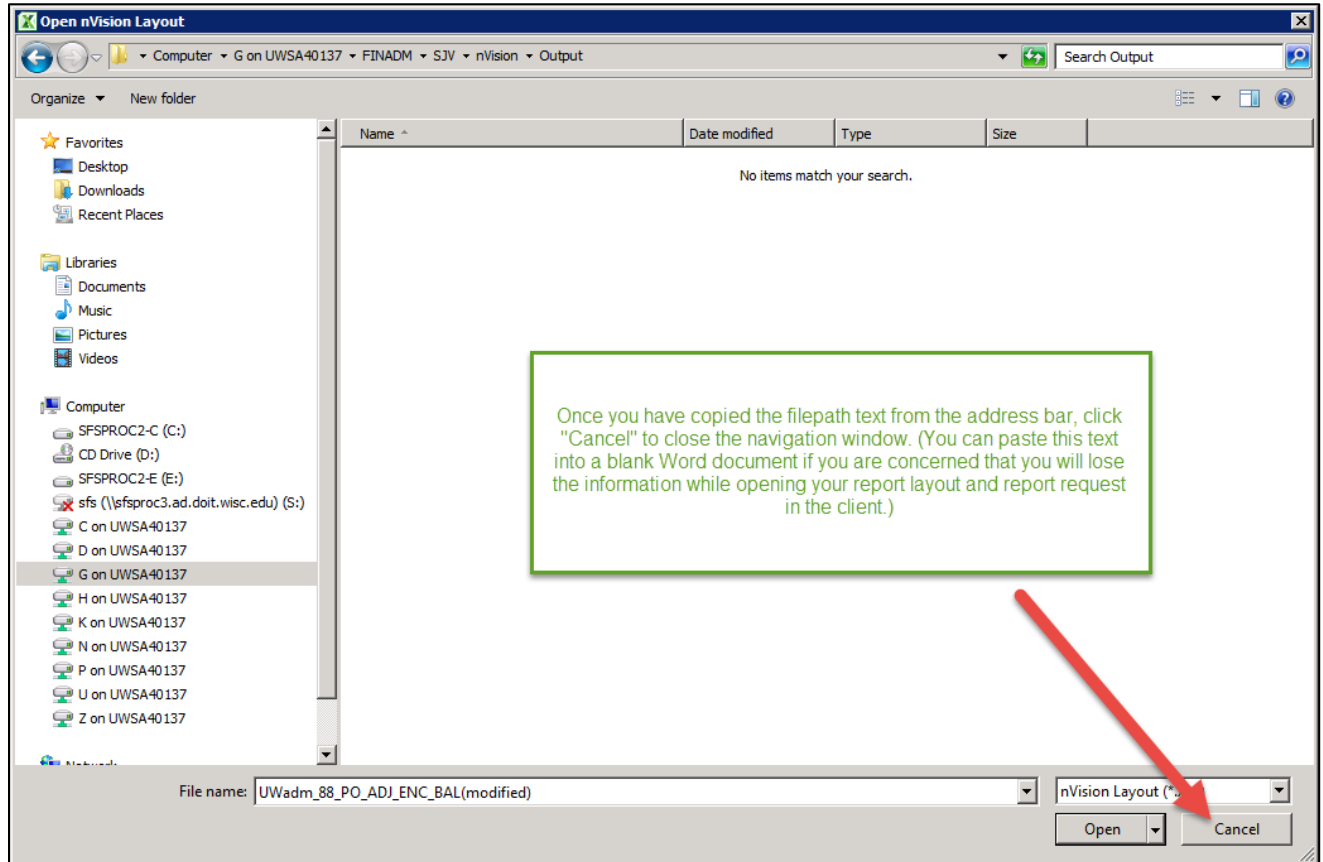
University of Wisconsin System SFS Business Process Change Where Your Report Output is Directed in SFS 9.2 nVision

4. In the address bar of the window, copy the address as text.



University of Wisconsin System SFS Business Process Change Where Your Report Output is Directed in SFS 9.2 nVision

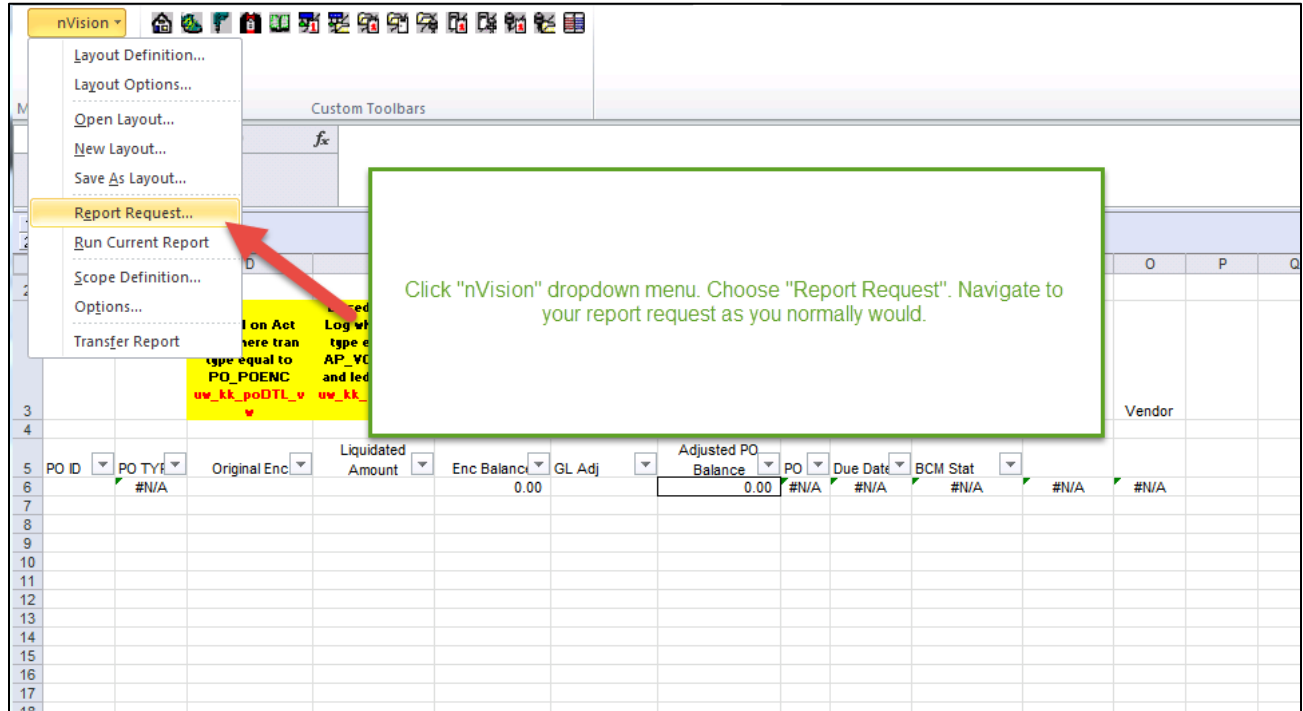
5. Click "Cancel" to close the window.



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Change Where Your Report Output is Directed in SFS 9.2 nVision

- Go to nVision and open the report request for your Business Unit and layout.



University of Wisconsin System SFS Business Process Change Where Your Report Output is Directed in SFS 9.2 nVision

7. Remove any text in the "Directory Template" field of the nVision report request. Paste the copied filepath in the field.

PeopleSoft nVision Report Request

Request ID

Request Name:

Report Title:

Requesting Business Unit: ?

Layout: ?

Instance Controls

Scope: ?

Directory Template: (Right-click context menu open with 'Paste' selected)

File Template:

Language Template: ☐

Email Template: ☐

Description Template: ☐

Security Template: ☐

Output Options

Type:

Format:

Options

☒ Enable nPlosion If Specified In Layout

☒ Data From Requesting Business Unit Only

☐ Translate Summary Ledgers to Detail

As Of Date for Trees

☒ Override Layout

☒ Use Main As Of Date

☐ Specify:

Error Handling

Time-out after minutes

Buttons: OK, Cancel, Run, New, Open, Save, Delete

Callout Box: Click in the directory template field. (If there is already information here, you will need to overwrite it.) Right click and paste your copied filepath here.

University of Wisconsin System SFS Business Process Change Where Your Report Output is Directed in SFS 9.2 nVision

8. You should see a new filepath that starts with '\\tsclient\..' instead of 'G:\', for example.

PeopleSoft nVision Report Request

Request ID
Request Name:
Report Title:

Requesting Business Unit: ? Layout: ?

Instance Controls
Scope: ?
Directory Template:
File Template:
Language Template:
Email Template:
Description Template:
Security Template:

Output Options
Type:
Format: ☒ From Business Unit Table

Options
☒ Enable nPlosion If Specified In Layout
☒ Data From Requesting Business Unit Only
☐ Translate Summary Ledgers to Detail

As Of Date for Trees
☒ Override Layout
☒ Use Main As Of Date
☐ Specify:

Error Handling
Time-out after minutes

Buttons: OK, Cancel, Run, New, Open, Save, Delete

You will notice that the filepath now looks different from the G:\ path previously housed in this field.

9. Save your report request.

Revision History

Author	Version	Date	Description of Change
Mike Niebanck	1.0	9/18/2018	Initial Draft