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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.

PeopleSoft nVision R	eport Request	
Request ID		ОК
Request Name:	TESTING	
Report Title:	testing testing	Cancel
Requesting <u>B</u> usines	s Unit	<u>B</u> un
_ <u>Instance</u> Controls _		New
Scope:	?	<u>O</u> pen
Directory Template:	\\tsclient\G\FINADM\SJV\nVision\Output	Save
File Template:	%RID%	Delete
Language Template		



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

PeopleSoft	PeopleSoft nVision				
Messa	ge :				
8	DOS error number 3 occurred while trying to create directory G:\FINADM\BDP\nvision\Results. (28,55)	× V			
Explan	ation :				
PS/nVisio problem c create dire the directo	PS/nVision was unable to create the requested directory. This problem can be caused by network security (you don't have rights to create directories) or by the presence of a file with the same name as the directory PS/nVision was trying to create.				
OK					

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

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

T18	• (* <i>f</i> x	
PeopleSoft.	00748094's Personal PS/nVision Hor	nePage
Actions	A	
Open Report	Run Report(s)	View Report(s)
Open Scope	Category:	
Open Layout Personalize nVision	Click "Open Lavout"	
Report Preferences		
Menu	Run Reports	View Reports
Toolbar	Balance Sheet	Balance Sheet
Add Buttons		



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





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





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

🔣 Open nVision Layout							×
GO v 🔰 ▼ Computer ▼ G on UWSA40137	7 ▼ FINADM ▼ SJV ▼ nVision ▼ Output	Copy address	▼ ⁶	Search Output			2
Organize 🔻 New folder		Copy address as text Edit address			•		•
🔆 Favorites	Name *	Delete history	Туре	Size			
🥅 Desktop		No items mat	vour search.				
Downloads							
Recent Places							
🥃 Libraries							
Documents		B. 14 P. 1 P. 1					
J Music		Right click in th	e address bar and cho	ose "Copy			
E Pictures			address as lexi .				
Videos							
📜 Computer							
G SFSPROC2-C (C:)							
🔮 CD Drive (D:)							
in SFSPROC2-E (E:)							
👷 sfs (\\sfsproc3.ad.doit.wisc.edu) (S:)							
P C on UWSA40137							
D on UWSA40137							
G on UWSA40137							
K on UWSA40137							
N on UWSA40137							
🖵 P on UWSA40137							
🖵 U on UWSA40137							
🖵 Z on UWSA40137							
🙀 Network							
					<i>1</i> 4 ¹	1	
File name: _BAL(modif	fied)		•	InVision Layout	(*.xnv)		_
				Open 👻	C	ancel	



5. Click "Cancel" to close the window.

Open nVision Layout								×
G 🕞 🗸 - Computer - G on UWSA40137 - FINADM - SJV - nVision - Output - 😰 Search Output							P	
Organize 🔻 New folder							:= • 🔳	
🚖 Favorites	Name *		Date modified	Туре	Size			
🧫 Desktop			No items match	your search				
Downloads			No recito noteri	your scurch.				
🖳 Recent Places								
Cibraries								
Documents Music								
Videos						_		
Normal Computer			conied the filone	th text from the av	droce har	click		
G SFSPROC2-C (C:)		"Cancel" to clo	se the navigation	window (You ca	n paste this	text		
🔮 CD Drive (D:)		into a blank Wo	ord document if vo	ou are concerned	that you wil	lose		
G SFSPROC2-E (E:)		the information	while opening you	ur report layout ar	id report re	quest		
sfs (\\sfsproc3.ad.doit.wisc.edu) (S:)			in the	client.)				
C on UWSA40137								
G op LW/SA40137	L L							
- 0 01 0W3A 0137								
🖵 K on UWSA40137								
🖵 N on UWSA40137								
🖵 P on UWSA40137								
🖵 U on UWSA40137								
🖵 Z on UWSA40137								
Se Matural V								
Eile namer UN/- das 88						ision Lavout (*		-
File name: [Uwadm_88_	PO_ADJ_ENC_BAL(modified)					sion Layout (
						Open 👻	Cance	I
								11.



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

	nVision 🔹 🏠 🚳 🌠	6 II 5 形形 1 F 1 F 1 F 1 F 1 F 1 F 1 F 1 F 1 F			
	Layout Definition				
	Layout Options				_
Μ	Open Layout	Custom Toolbars			
	New Layout	f_x			
	Save <u>A</u> s Layout				
	Report Request				
-	<u>R</u> un Current Report				
	Scope Definition	D Click We Knigell deer deue meens Change "Der et Derwert" Mexigete te	0	P	Q
-	Options	Click "nvision" dropdown menu. Choose "Report Request". Navigate to			
	Transfer Report	lon Aet Log with your report request us your formally would.			
3 4	estimation of the second secon	requal to AP_YC POENC and led _poDTL_v uw_kk_ _v	Vendor		
5		Liquidated Adjusted PO			
6	#N/A	Amount Ene balance DE Adj Datance To babance De back De back	#N/A		
7					
9					
10					
12					
13					
15					
10					



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: TE Report Title: tes	STING ting testing	OK Cancel
Requesting <u>B</u> usiness Unit	Layout	<u>R</u> un
Scope:	?	<u>N</u> ew Open
Directory Template:	Undo	<u>S</u> ave
Language Template:	Car Copy Paste	Elerere
Description Template:	Select All	
Security Template:	Click in the directory templa there is already information h need to overwrite i Right click and paste your co	ate field. (If lere, you will t.) pied filepath
Format Microsoft Ex	here.	
Options Enable nPlosion If Sp Data From Requesting Translate Summary Le Error Handling Time-out after 0 mi	As Of Date for <u>I</u> re ecified In Layout g Business Unit Only edgers to Detail nutes	ees out Of Date



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

pleSoft nVision Re	port Request		
R <u>e</u> quest ID			
Request Name:	TESTING		
Report Title:	testing testing		Cancel
Requesting <u>B</u> usiness	Unit		<u>B</u> un
UWADM	? UWadm_88_P0_A	DJ_ENC_BA ?	
nstance Controls —			New
Scope:		?	<u>O</u> pen
Directory Template:	\\tsclient\G\FINADM\SJ	V\nVision\Output	<u>S</u> ave
File Template:	%RID%		<u>D</u> elete
Language Template:			
Email Template:			
Description Template	·		
Security Template:	New will make	- 46 - 4 46 - 61 46	
	looks differ	e that the mepath ent from the GN n	ath
Dutput Options	previously	housed in this fie	ld.
Type File	· · · ·		
Format Microso	ft Excel Files (*.xls)	From Business	Unit Table
D <u>p</u> tions		As Of Date for <u>T</u> rees	s
🔽 Enable nPlosion	If Specified In Layout	🔽 Override Layou	t 🔤
🔽 Data From Requesting Business Unit Only		Use Main As O	f Date
Translate Summ	ary Ledgers to Detail	O Specify:	
Error Handling			

9. Save your report request.



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

Revision History

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