



## University of Wisconsin System SFS Business Process Deleting nVision Report Requests

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### Deleting nVision Report Requests Overview

PS/nVision retrieves information from the PeopleSoft database and places it into a Microsoft Excel spreadsheet. You use familiar Excel commands to format and analyze the data.

Report Requests are used as a run control to organize information for Business Units and Layouts.

<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

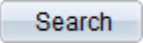
### Process Detail

#### I. Gathering information

1. Determine the *Report Request ID* you wish to remove.
2. **Identify** the *report layout(s)* which is no longer needed.
3. **Notify** Problem Solvers which 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.

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


1. Navigate to PS/nVision Report Request - *Reporting Tools> PS/nVision> Define Report Request*.
2. **Enter** the *Business Unit* from which the report originates and the specific *Report ID*.
3. **Click** 
4. **Click** the appropriate report line hyperlink.

**Report Request**

Enter any information you have and click Search. Leave fields blank if not known.

[Find an Existing Value](#) [Add a New Value](#)


**Search Criteria**

Business Unit   

Report ID

Description

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

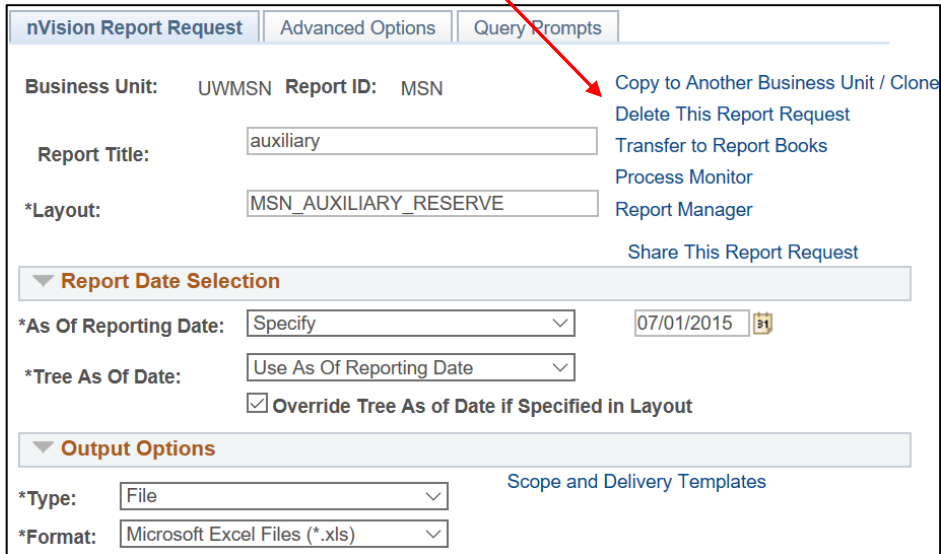
**Search Results**

View All First 1-100 of 119 Last

Business Unit	Report ID	Description
UWMSN	03BUDFND	Budget Summary by Fund
UWMSN	233 CASH	233 Cash Balance
UWMSN	75UPGRAD	75 upgrade check report
UWMSN	88UPGGD1	88 upgrade check report - STD
UWMSN	88UPGRAD	88 upgrade check report
UWMSN	89UPGGD	89 upgrade check report
UWMSN	89UPGGD1	89 upgrade check report

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Select "Delete This Report Request".



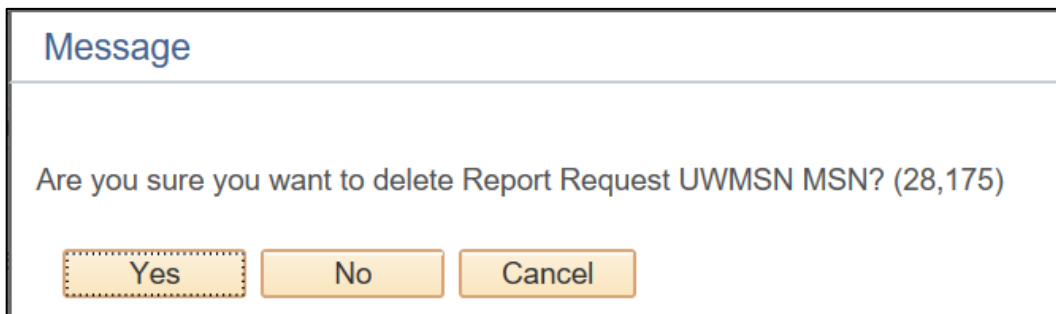
The screenshot shows the 'nVision Report Request' form with the following details:

- Business Unit:** UWMSN **Report ID:** MSN
- Report Title:** auxiliary
- \*Layout:** MSN\_AUXILIARY\_RESERVE
- Report Date Selection:**
  - \*As Of Reporting Date:** Specify (dropdown), 07/01/2015 (calendar icon)
  - \*Tree As Of Date:** Use As Of Reporting Date (dropdown)
  - ☒ **Override Tree As of Date if Specified in Layout**
- Output Options:**
  - \*Type:** File (dropdown)
  - \*Format:** Microsoft Excel Files (\*.xls) (dropdown)

On the right side of the form, the following links are visible:

- Copy to Another Business Unit / Clone
- Delete This Report Request** (indicated by a red arrow)
- Transfer to Report Books
- Process Monitor
- Report Manager
- Share This Report Request

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



The screenshot shows a 'Message' box with the following content:

Are you sure you want to delete Report Request UWMSN MSN? (28,175)

At the bottom of the box are three buttons: **Yes**, **No**, and **Cancel**.

Once your report has been deleted, you should no longer find it in *Reporting Tools > PS/nVision > Define Report Request*.



**University of Wisconsin System SFS  
Business Process  
Deleting nVision Report Requests**

**Revision History**

Author	Version	Date	Description of Change
Mike Niebanck	1.0	09/17/18	Initial Draft