

This guide is designed to quickly instruct you to run a report using delivered functionality. This replaces the custom "UW/nVision" menu where you previously entered run control data, submitted parameters and ran reports from the custom Report Request page. It's not as long and detailed as the Reporting Console video (Link to Reporting Console Video), or the Reporting Console Business Process Guide (Link to Reporting Console Business Process Guide), which is a complete reference and contains all information about running and retrieving all reports.

Accessing the Reporting Console

There are two ways to navigate to Reporting Console

- 1. Using the Navigation Bar
- 2. Using GL WorkCenter Homepage Tile
- 1. Using the Navigation Bar = Navigation: *Reporting Tools > Reporting Console*.

Navi	gator	O
	Reporting Tools	
es:	Composite Query	>
	Query	>
es	Connected Query	>
r	PS/nVision	>
	BI Publisher	>
ger	Reporting Console	

OR



2. Using GL WorkCenter Homepage Tile: From your Homepage click on the GL WorkCenter Tile:

UNIVERSITY O WISCONSIN S	DF YSTEM		✓ Homepage		Â	৹ ≡
	GL WorkCenter	Expenses	Expense WorkCenter	Travel Authorizations	Buyer WorkCenter	
	Accounts Payable WorkCenter	Non-Expense Approvals	Asset Management WorkCenter	Cash Management WorkCenter	Billing WorkCenter	

Then click on the Reports and Queries tab:



In the Reports/Processes section click on Reporting Console.



Comepage			
General Ledger WorkCenter Main Reports/Queries	0	• «	Create/Update Journal Entries
Query Manager My Queries	~	0 •	Eind an Existing Value Add a New Val
 Hyper Link Ledger Data Ledger ADB Data Month to date averages Year to date averages 			Journal ID NEXT Journal Date 10/08/2018
			Add
			Find an Existing Value Add a New Value
n Reports/Processes	0	0.4	
 ✓ My Processes Image: Image: Im			
Monitor Process Monitor Reporting Console Report Manager			

		General Ledger	WorkCenter	
Reporting Console	Quick Run	Import Favorites	Process Monitor	Report Manager
		Personalize View	All First 🕚 1-3 of	3 🕑 Last
Name				
My Reports				
🗏 🛅 My Process Requests				
🖻 🛅 My Favorites 🔻				

Using the Reporting Console

From the Reporting Console you can run nVision Reports and Queries, link to Process Monitor and Report Manager. **HOWEVER, the first step you must take is to create your Preferences**.



1. Click on the Preference link.

Reporting Console
Preference
T TOTOLOGICE
Name
🗏 🛅 My Reports
🗉 🛅 My Process Requests
🗏 🛅 My Favorites 🔻

2. Enter your preferences. Preferences can be changed at any time so make your choices, **click OK**. You can always come back later and update.

Default Folder			Process Link Display Option				
Туре	Display Order	Active					
My Reports	1		◯ Name only				
My Process Requests 2			Description only				
My Favorites	3		Name and Description				
Process Request Di	splay Option						
User ID 00913865		Q	Run Status 🔹 🔻				
Туре		Q	Name				
Display Option							
Distribution Status Po	sted v						
Show Instances For							
Last •	1 Days	•					
Display latest	10 Instance						
Process Request No	otification						
Enabled							

3. To run reports, click on **Quick Run**.





4. Populate the radio button by the report Type you want to run.

Process Search / Run						
 Process Type/Name People Soft Query Connected Query Query-Based BIP Reports 						
nVision Report Request	begins with	•	nVision-Report	¥		
Process Type Process Name	begins with	•	NVSRUN			
	1 1 10	-			Canada	

Report ID	begins with			Search	
Process List	Pe	rsonalize Find \	/iew 100 💷	🔣 🛛 First 🕚 1-50 of 4279 🕦 Last	
Process Type	Process Name	Business Unit	Report ID	Description	Run
nVision-Report	NVSRUN	BRMIL	MILSTLOA	Short Term Loans	Run
nVision-Report	NVSRUN	BRRVF	TEST_DGS		Run
nVision-Report	NVSRUN	M04	PRCR_PMT	PaymentHistory by Vendor	Run
nVision-Report	NVSRUN	M04	PRCR_PO	PO History by Vendor	Run
nVision-Report	NVSRUN	M04	PRCR_RCV	Receiver History by Shipto	Run
nVision-Report	NVSRUN	M04	PRCR_VCH	Voucher History by Vendor	Run
nVision-Report	NVSRUN	UWADM	0LDINTDS	PER 12 - Interest Distribution	Run
nVision-Report	NVSRUN	UWADM	75UPGRAD	75 upgrade check report	Run
nVision-Report	NVSRUN		88UPGGD1	88 upgrade check report - STD	Run

5. Enter a **Report ID** in the Report ID field to narrow your search.

Process Type	begins with	۳	nVision-Report	٣		
Process Name	begins with	۳	NVSRUN			
Report ID	begins with	۳	01BS		Search	
Process List			Personalize F	ind View All I	💷 🔣 🛛 First 🕚 1-4 of 4 🕑	Last
Process Type	Process Name		Business Unit	Report ID	Description	Run
nVision-Report	NVSRUN		UWMIL	01BS101	Budsum Fund 101- GEA DEPTID	Run
nVision-Report	NVSRUN		UWMIL	018S101A	Budsum Fund 101 GEA ACCOUNT	Run
nVision-Report	NVSRUN		UWMIL	01BS101D	Budsum Fund 101 GEA DIV	Run
nVision Report	NVSRUN		UWMIL	01BS189	Budsum Fund 189 GEA DEPTID	Run

6. Click the "Run" link located to the right of the report and the nVision Report Request page populates.



PS/nVisi	on Report R	equest			×
				ŀ	Help
nVision R	eport Reques	t Advanced Options	Query Prompts		
Business	Unit: UWN	AIL Report ID: 01BS1	01A	Copy to Another Business Unit / Clon Delete This Report Request	e
Report T	ïtle:	Budsum Fund 101 GEA	ACCOUNT	Transfer to Report Books	
				Process Monitor	
*Layout:		MIL_88_BUDSUM_101_	GEA_ACCOUNT	Report Manager	
				Share This Report Request	
- Repo	rt Date Selec	tion			
*As Of Rep	orting Date:	Specify	•	02/29/2016	
*Tree As C	Of Date:	Use As Of Reporting Da	te 🔻		
		Override Tree As of I	Date if Specified	in Layout	
💌 Outpu	ut Options				
*Type:	Window	Ŧ	Scope and	Delivery Templates	
Format:	Microsoft Exc	cel Files (.xls) 🔹			
Ri	un Report				
OK	Cancel	Apply			

7. VERY IMPORTANT!!! Verify all data.....especially the *Query Prompts* page.



nVision Report Reques	t Advanced Options Query Pro	mpts
Business Unit: UWN	/IIL Report ID: 01BS101A	Copy to Another Business Unit / Clone Delete This Report Request
Report Title:	Budsum Fund 101 GEA ACCOUNT	Transfer to Report Books
*Layout:	MIL_88_BUDSUM_101_GEA_ACCO	Process Monitor UN1 Report Manager
		Share This Report Request
Report Date Select	tion	
*As Of Reporting Date:	Specify •	02/29/2016
*Tree As Of Date:	Use As Of Reporting Date	ified in Layout
 Output Options 		
*Type: Window	▼ Scope	and Delivery Templates
Format: Microsoft Exc	cel Files (.xls)	
Run Report		
🔚 Save 🔯 Return to	Search Notify	🛃 Add 🖉 Update/Display
nVision Report Request A	dvanced Options Query Prompts	

Ision Report Request Advanced Options	Query Prompts				
Business Unit: UWMIL Report ID: 01	BS101A				
Update Parameters					
Query Prompts	Find	First	۱ 🕚	of 1	Last
Query Name UW_ACTUAL_ENCUMBERED	_AMT				
	Find View All 💷	First	1	of 1	Last
Prompt Name	Prompt Value				

8. Click on "Update Parameters" to make sure that the Query Prompt Fields are updated with the correct information. Enter data into the parameter fields and click Save. Then go to nVision Report Request.

Vision Report Request Advanced Options Qu	ery Prompts	
Business Unit: UWMIL Report ID: 01BS10	01A	
Update Parameters		
Query Prompts	Find	First 🕚 1 of 1 🕑 Last
Query Name UW_ACTUAL_ENCUMBERED_AM	ЛТ	
	Find View All 💷	First 🕚 1 of 1 🕑 Last
Prompt Name	Prompt Value	

9. When all data is entered and verified click **Run Report**.



nVision Report Reque	Advanced Options Query Prompt	s			
Business Unit: UV	/MIL Report ID: 01BS101A	Copy to Another Business Unit / Clone Delete This Report Request			
Report Title:	Budsum Fund 101 GEA ACCOUNT	Transfer to Report Books			
*Layout:	MIL_88_BUDSUM_101_GEA_ACCOUN	Process Monitor Report Manager			
		Share This Report Request			
Report Date Sele	ection				
*As Of Reporting Date:	Specify •	02/29/2016			
*Tree As Of Date:	Use As Of Reporting Date Vertical Ve	d in Layout			
 Output Options 					
*Type: Window	▼ Scope and	d Delivery Templates			
Format: Microsoft E	xcel Files (.xls)				
Run Report	-				
🔚 Save 🔯 Return	to Search 🔚 Notify	🛃 Add 🖉 Update/Display			
nVision Report Request	Advanced Options Query Prompts				

10. Leave server name to default the correct server or define as SFSNT1.

Proce	ss Scheduler Request				
	User ID 00913865	R	un Control ID		
s	erver Name SFSNT1	Run Date 10/	08/2018		
	Recurrence	Run Time 9:12	2:50AM	Reset to Curre	nt Date/Time
	Time Zone				
Proce	ss List				
Select	Description	Process Name	Process Type	*Туре	*Format
	nVision Report	NVSRUN	nVision Report	Default •	Default 🔻

11. You may see this page populate, you can close this page and proceed to Process Monitor or wait until the Process completes.

Reporting Console				× 🗅	Define	e Report Requ	est	×	ß	nVision-Report	- NVSRUN	×
\leftarrow	\rightarrow (C		sfstest.wisc	consin	.edu/psc/sfp	orrel1-BD_5	52/EM	PLOY	EE/ERP/s/WEI	BLIB_RPT.I	ISCRIPT1.F
Queu	ed											
Proc	ess Nan	ne:	NVSRUN	nVision Rep	oort							
Proc	ess Inst	ance:	10090168	Process Ty	pe:	nVision-Rep	ort					

12. Go to Process Monitor.



nVision Report Rec	quest Advanced Options Query Prompt	S			
Business Unit:	UWMIL Report ID: 01BS101A	Copy to Another Business Unit / Clone Delete This Report Request			
Report Title:	Budsum Fund 101 GEA ACCOUNT	Transfer to Report Books			
		Process Monitor			
*Layout:	MIL_88_BUDSUM_101_GEA_ACCOUN	Report Manager			
		Share This Report Request			
Report Date S	election				

13. Once successful, click on the link to return to Report Request and go to the link to Report Manager.

View	Process R	leque	st For										
L	Jser ID 0091	3865	Q	Туре		٣	Last	٣	1	Days	Ŧ	Refresh	
	Server		٣	Name	NVSRUN	Q	Instance F	rom	Instance To				
Dun	Statue		-			C		100					
Run	Status		•	Distr	ibution Status	5		▼ Save	On Refresh				
Proc	ess List		•	Distr	ibution Status	5		▼ Save	On Refresh sonalize Find Vi	ew All 💷		First 🐠 1 of 1	🛞 La
Proc Select	ess List	Seq.	Process T	Distr	ibution Status	Process Name	User	▼ Save Per Run Date/Time	On Refresh sonalize Find Vi	ew All 💷 Run S	Status	First 🚯 1 of 1 Distribution Status	 La Details

Go back to Report	Request	
nVision Report Requ	est Advanced Options Query Prom	pts
Business Unit: U	WMIL Report ID: 01BS101A	Copy to Another Business Unit / Clone Delete This Report Request
Report Title:	Budsum Fund 101 GEA ACCOUNT	Transfer to Report Books Process Monitor
*Layout:	MIL_88_BUDSUM_101_GEA_ACCOUI	NT Report Manager

14. Report Manager – Administration page: Use the link to view the report output. Once you click on the Report Description hyper-link an Excel file will populate with your report.

List	Expl	orer /	Administra	tion	Archives						
View	w Repo	orts For									
	User ID 00913865 Status		65	Тур	e		▼ Last	٣	1		
			•	Folde	r	▼ Instance			to	to	
Rep	ort Lis	st			Personalize	Find View	/ All 💷 🔣	First	🕚 1 of 1	🕑 La	
Selec	t	Report ID	Prcs Instance	Descrip	tion		Request Date/Time	Format	Status	Details	
		7936080	10090168	Budsur	n Fund 101 GEA	ACCOUN	T 10/08/2018 9:15:58AM	Microsoft Excel Files (*.xls)	Posted	Details	



	÷.	ा 🐡 🤹 👻 🗧 Budsum Fund 101 GEA ACCOUNT [Protected View] - Excel									Mike Ni	ebanck [五 —				
File		Home	Insert	Draw	Page Layout	Formulas	Data	Review	View	Power Pivot	QuickBooks	Q Tell	me what you	u want to do			
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	3	Fund 10	1 - Gen	eral Ed	ucation Adm	inistratio	n									Rep	ort
	4	Report da	ata as of:	Februa	ry 29, 2016											Filer	nan
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