

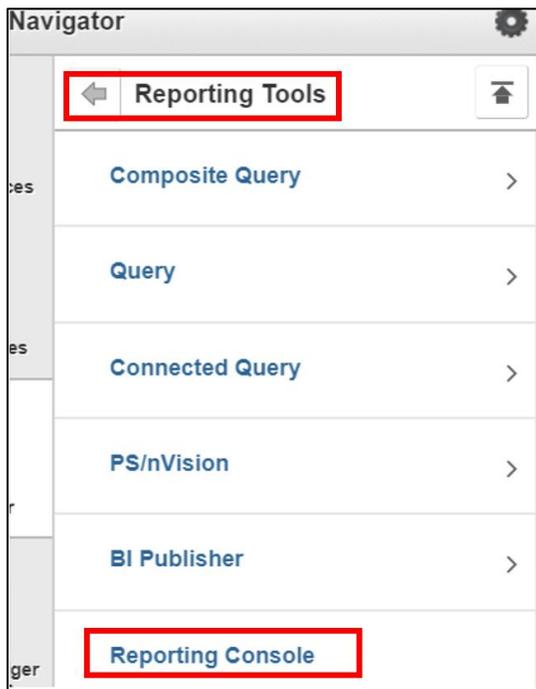
This guide is designed to quickly instruct you to run a report using delivered functionality. This replaces the custom “UW/nVision” menu where you previously entered run control data, submitted parameters and ran reports from the custom Report Request page. It’s not as long and detailed as the Reporting 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.**

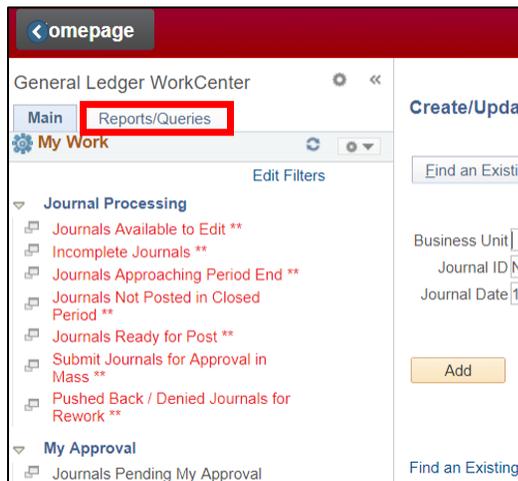


OR

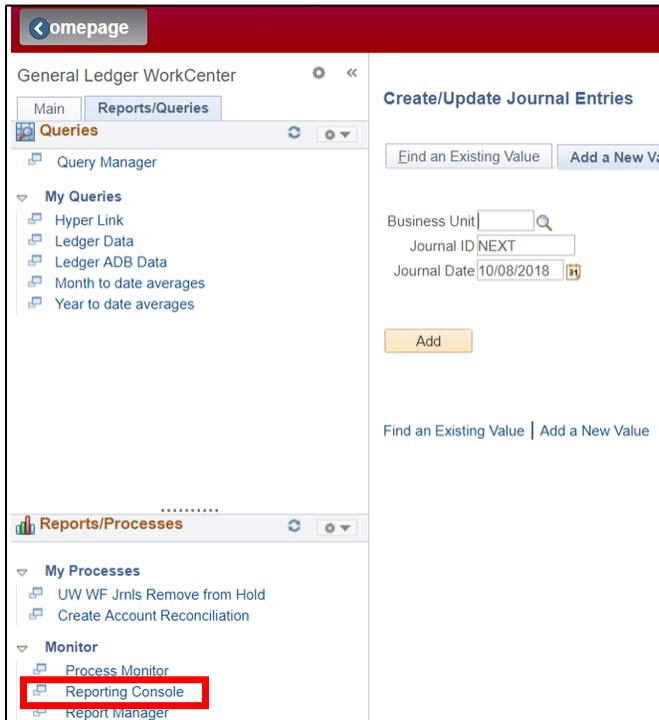
- Using GL WorkCenter Homepage Tile: From your Homepage click on the GL WorkCenter Tile:



Then click on the Reports and Queries tab:



In the Reports/Processes section click on Reporting Console.



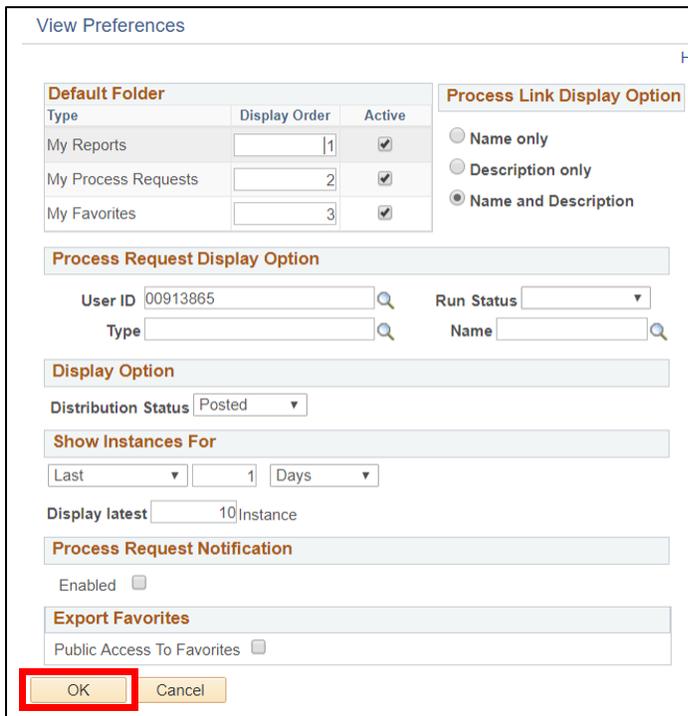
Using the Reporting Console

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.



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.



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
 PeopleSoft Query
 Connected Query
 Query-Based BIP Reports
 nVision Report Request

Process Type: begins with | nVision-Report
 Process Name: begins with | NVSRUN
 Report ID: begins with |

Process List Personalize | Find | View 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	UWADM	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 | nVision-Report
 Process Name: begins with | NVSRUN
 Report ID: begins with | 01BS

Process List Personalize | Find | View All | | 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	01BS101A	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/nVision Report Request Help

nVision Report Request | Advanced Options | Query Prompts

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_ACCOUNT [Report Manager](#)
[Share This Report Request](#)

Report Date Selection

*As Of Reporting Date: Specify 
 *Tree As Of Date: Use As Of Reporting Date
 Override Tree As of Date if Specified in Layout

Output Options [Scope and Delivery Templates](#)

*Type: Window
 Format: Microsoft Excel Files (.xls)

Run Report

OK Cancel Apply

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

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

- Business Unit:** UWMIL **Report ID:** 01BS101A
- Report Title:** Budsum Fund 101 GEA ACCOUNT
- *Layout:** MIL_88_BUDSUM_101_GEA_ACCOUNT
- Report Date Selection:**
 - *As Of Reporting Date: Specify (dropdown) 02/29/2016
 - *Tree As Of Date: Use As Of Reporting Date (dropdown)
 - Override Tree As of Date if Specified in Layout
- Output Options:**
 - *Type: Window
 - *Format: Microsoft Excel Files (*.xls)

Buttons at the bottom include: Run Report, Save, Return to Search, Notify, Add, and Update/Display.

The screenshot shows the 'Query Prompts' section with the following details:

- Business Unit:** UWMIL **Report ID:** 01BS101A
- Query Name:** UW_ACTUAL_ENCUMBERED_AMT
- A table with columns 'Prompt Name' and 'Prompt Value' is visible but empty.

- 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.

This screenshot is identical to the previous one, but the 'Update Parameters' button is highlighted with a red box.

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

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nVision Report Request | Advanced Options | Query Prompts

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_ACCOUNT Report Manager
 Share This Report Request

Report Date Selection

*As Of Reporting Date: Specify 02/29/2016
 *Tree As Of Date: Use As Of Reporting Date
 Override Tree As of Date if Specified in Layout

Output Options

*Type: Window Scope and Delivery Templates
 Format: Microsoft Excel 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.

Process Scheduler Request

User ID 00913865 Run Control ID

Server Name SFSNT1 Run Date 10/08/2018
 Recurrence Run Time 9:12:50AM Reset to Current Date/Time

Time Zone

Process List

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	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 Report Request | nVision-Report - NVSRUN

https://test.sfstest.wisconsin.edu/psc/sfprrel1-BD_52/EMPLOYEE/ERP/s/WEBLIB_RPT.ISCRPT1.F

Queued

Process Name: NVSRUN nVision Report
 Process Instance: 10090168 Process Type: nVision-Report

12. Go to Process Monitor.

University of Wisconsin System Quick Reference How to Run Reports via Reporting Console

nVision Report Request | Advanced Options | Query Prompts

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_ACCOUNT [Report Manager](#)
[Share This Report Request](#)

▼ Report Date Selection

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

Process List | Server List

View Process Request For

User ID: 00913865 Type: Last 1 Days Refresh

Server: Name: NVSRUN Instance From: Instance To:

Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	10090168		nVision Report	NVSRUN	00913865	10/08/2018 9:12:50AM CDT	Success	N/A	Details

[Go back to Report Request](#)

nVision Report Request | Advanced Options | Query Prompts

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_ACCOUNT [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 | Explorer | **Administration** | Archives

View Reports For

User ID: 00913865 Type: Last 1

Status: Folder: Instance: to:

Select	Report ID	Prce Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	7936080	10090168	Budsum Fund 101 GEA ACCOUNT	10/08/2018 9:15:58AM	Microsoft Excel Files (*.xls)	Posted	Details



University of Wisconsin System

Quick Reference

How to Run Reports via Reporting Console

Budsum Fund 101 GEA ACCOUNT [Protected View] - Excel Mike Niebank

File Home Insert Draw Page Layout Formulas Data Review View Power Pivot QuickBooks Tell me what you want to do

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. Enable Editing

B8

		PERMANENT SALARY		LTE-STUDENT		SUPPLY		SALES CREI	
DEPTID	DESCR	Budget	Balance	Budget	Balance	Budget	Balance	Budget	B
9	010200 Chancellors Office	616,012	40,916	13,947	(1,015)	928,208	869,728	-	
10	010300 General Interdepartmental	-	-	-	-	25,000	(25,000)	-	
11	014000 Univ Comm & Media Relations	660,492	(7,978)	-	-	137,866	(36,463)	-	
12	014030 Security Program	-	-	-	-	60,000	889	-	
13	014055 Communication & Media Relation	62,409	15,119	-	(6,390)	9,756	759	-	
14	014057 News & Publications - Bulletin	-	-	-	-	6,303	(22,704)	-	