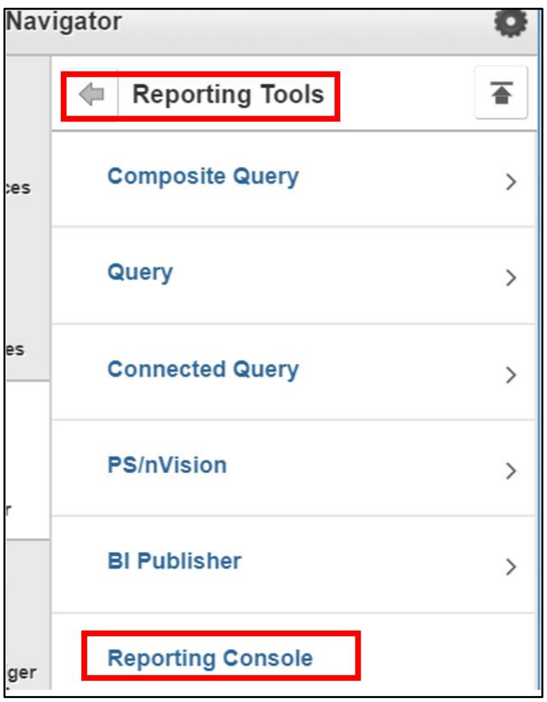
University of Wisconsin System
Quick Reference
How to Run Reports via Reporting Console

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

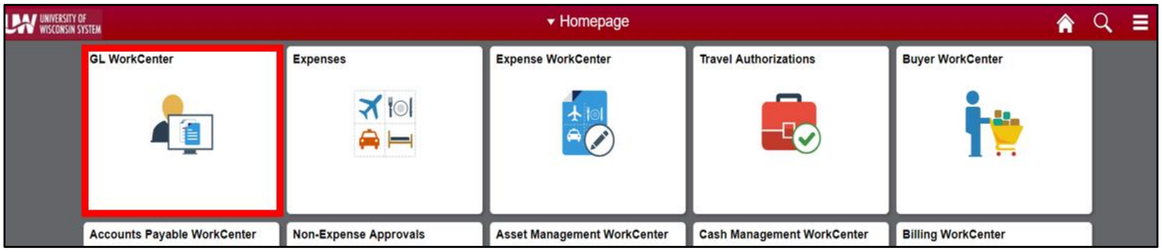
There are two ways to navigate to Reporting Console
1. Using the Navigation Bar
2. Using GL WorkCenter Homepage Tile

1. Using the Navigation Bar = Navigation: ***Reporting Tools > Reporting Console***.

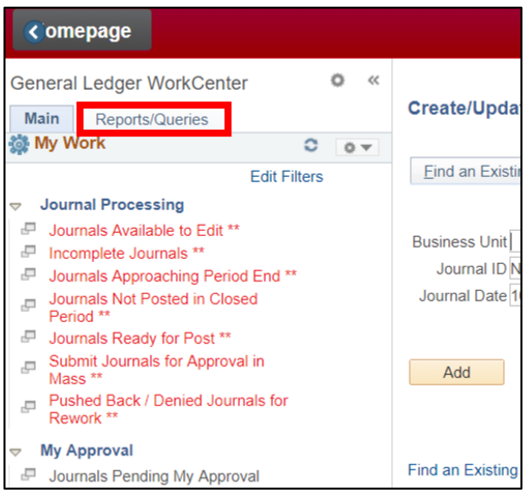


OR

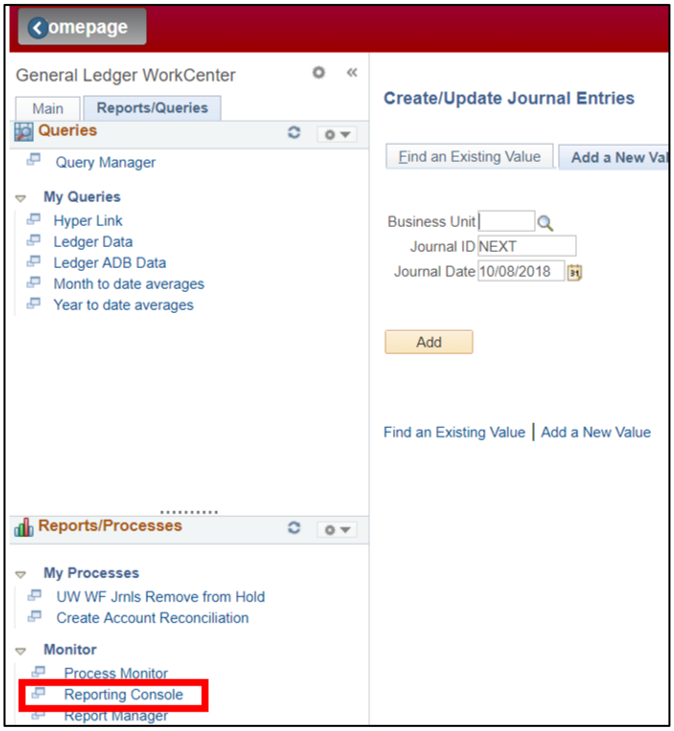
2. Using GL WorkCenter Homepage Tile: From your Homepage click on the GL WorkCenter Tile:

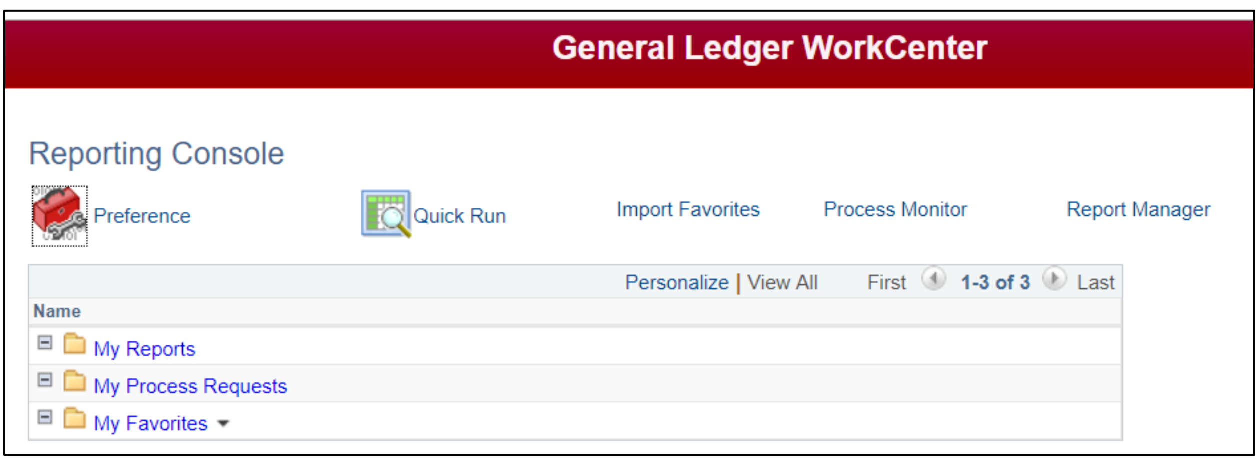


Then click on the Reports and Queries tab:



In the Reports/Processes section click on Reporting Console.

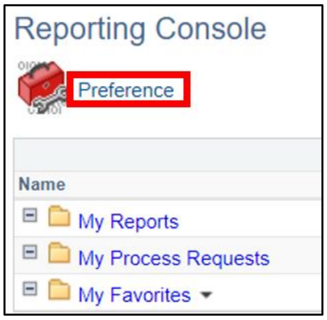




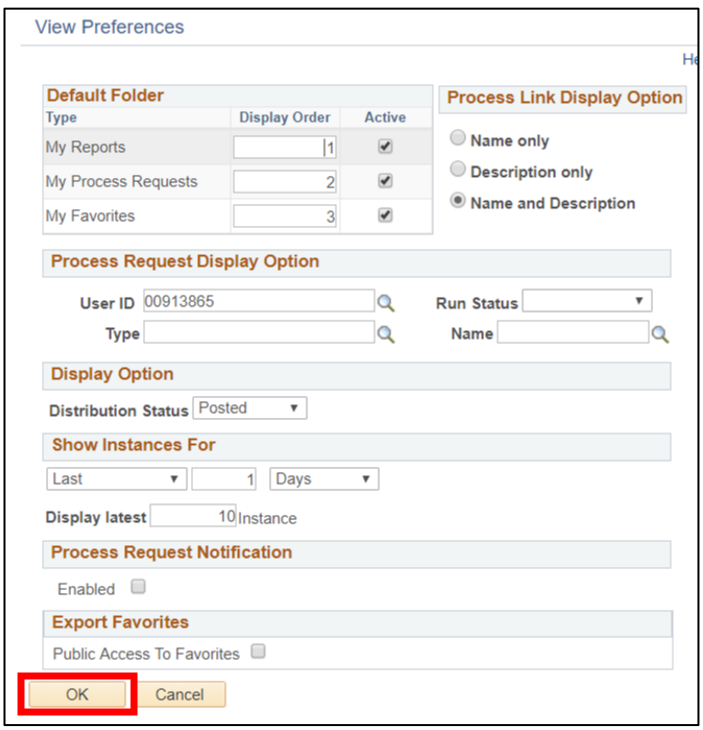
Using the Reporting Console

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.

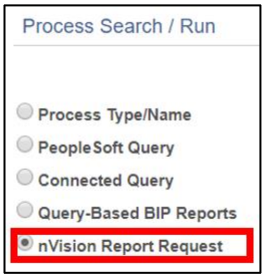


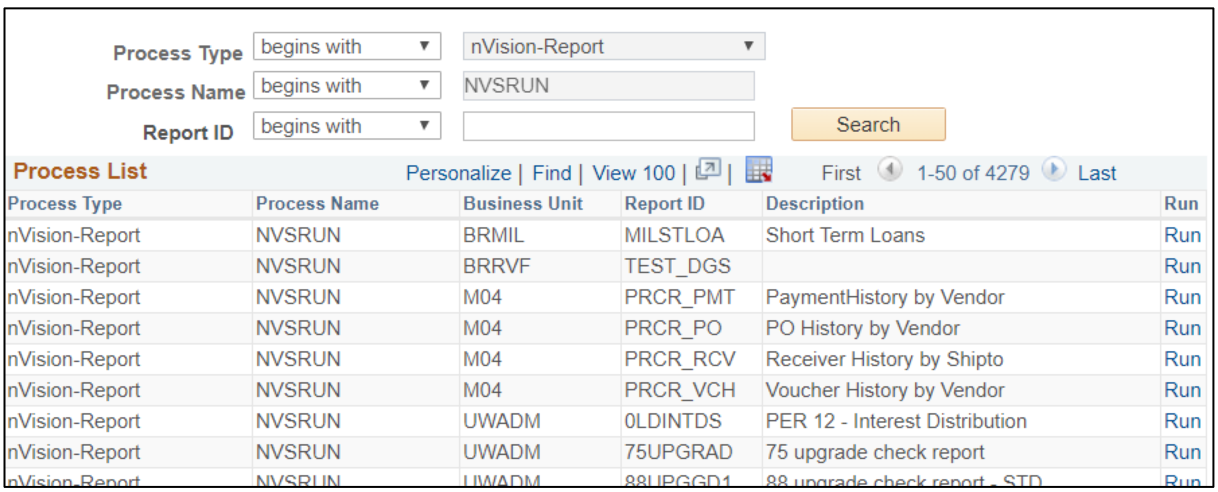
2. Enter your preferences. Preferences can be changed at any time so make your choices, **click OK**. You can always come back later and update.



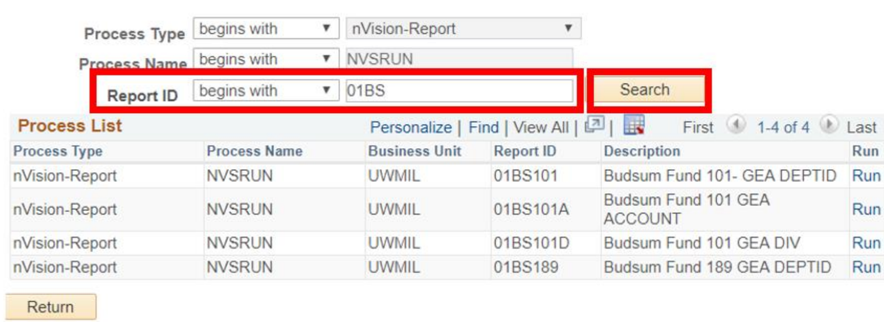
3. To run reports, click on **Quick Run**.

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

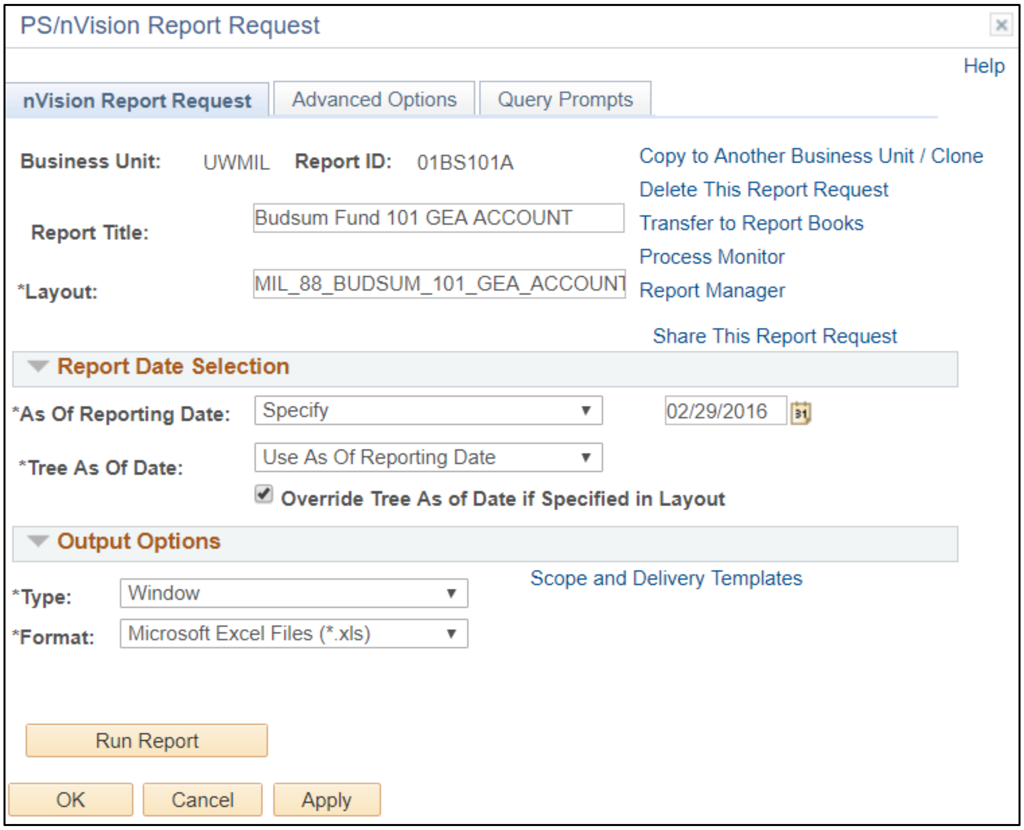




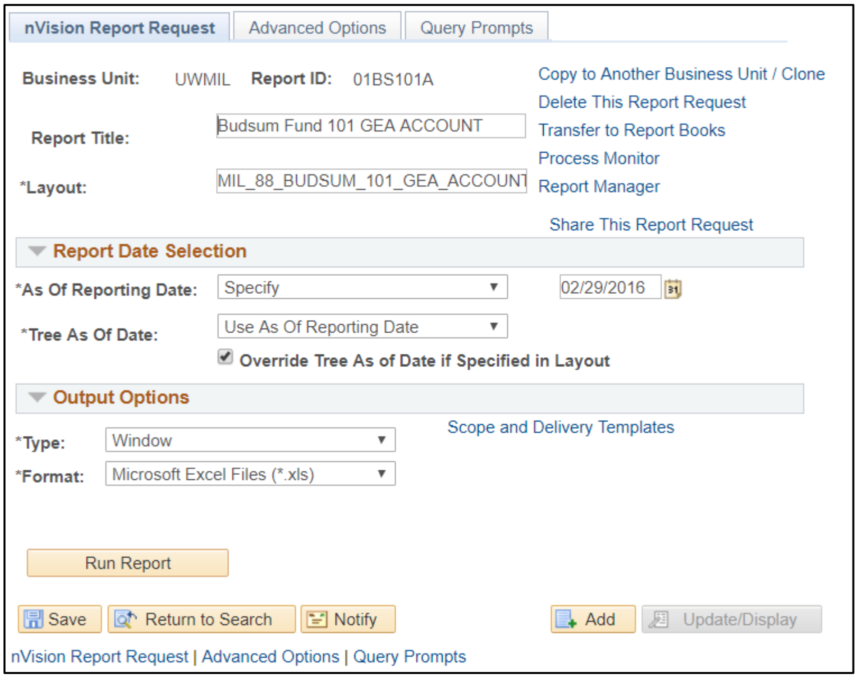
5. Enter a **Report ID** in the Report ID field to narrow your search.

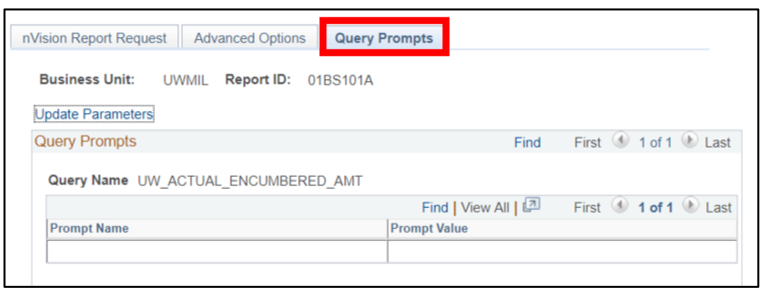


6. Click the “Run” link located to the right of the report and the nVision Report Request page populates.

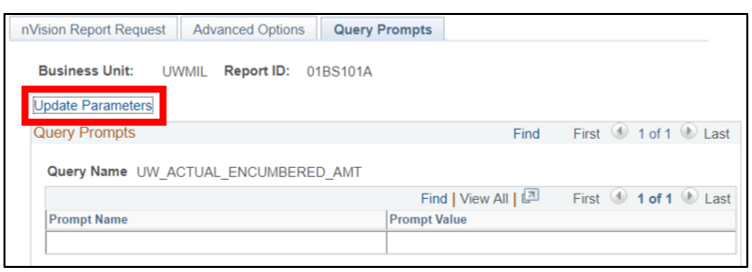


7. **VERY IMPORTANT!!!** Verify all data…..especially the ***Query Prompts*** page.

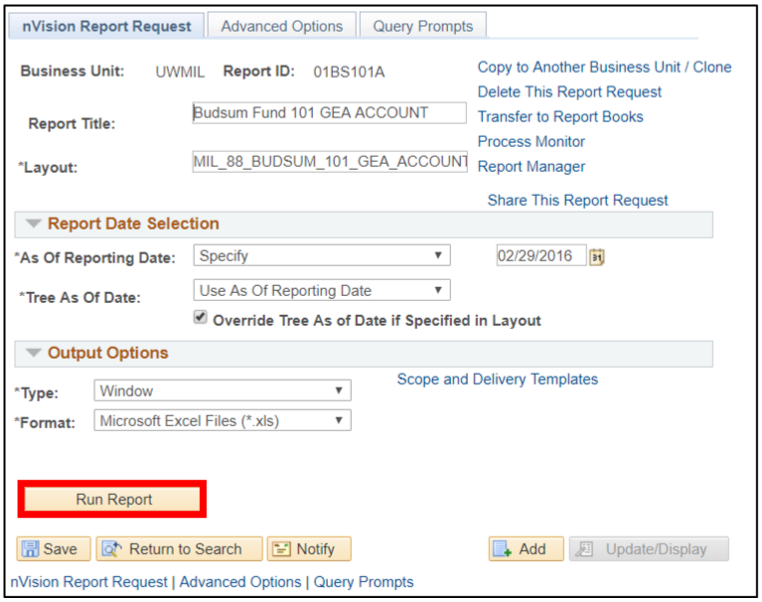




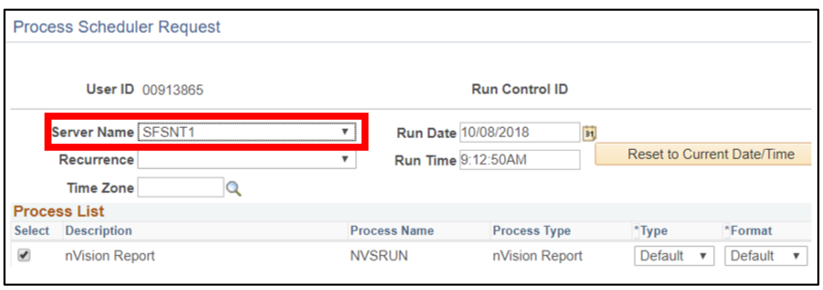
8. Click on "Update Parameters" to make sure that the Query Prompt Fields are updated with the correct information. Enter data into the parameter fields and click Save. Then go to nVision Report Request.



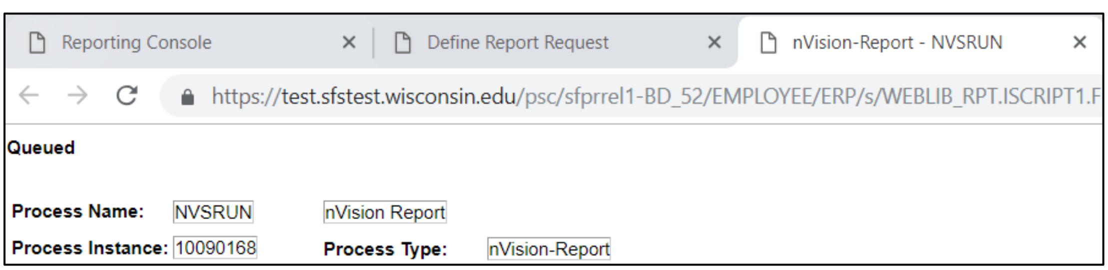
9. When all data is entered and verified click **Run Report**.



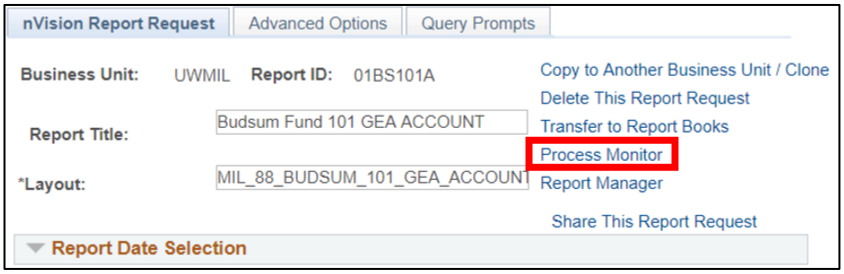
10. Leave server name to default the correct server or define as SFSNT1.



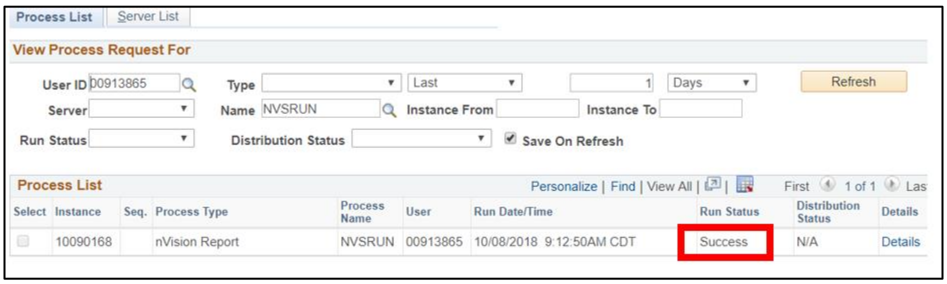
11. You may see this page populate, you can close this page and proceed to Process Monitor or wait until the Process completes.

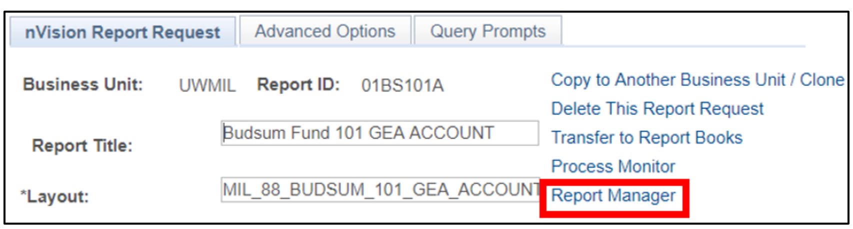


12. Go to Process Monitor.

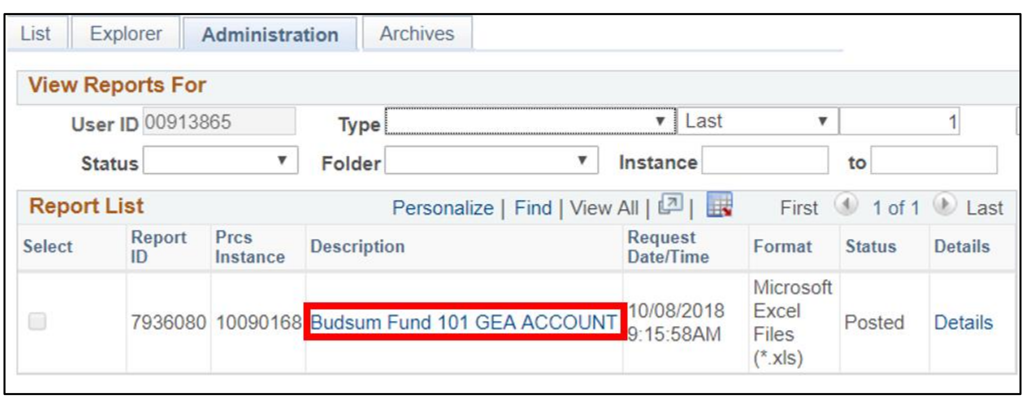


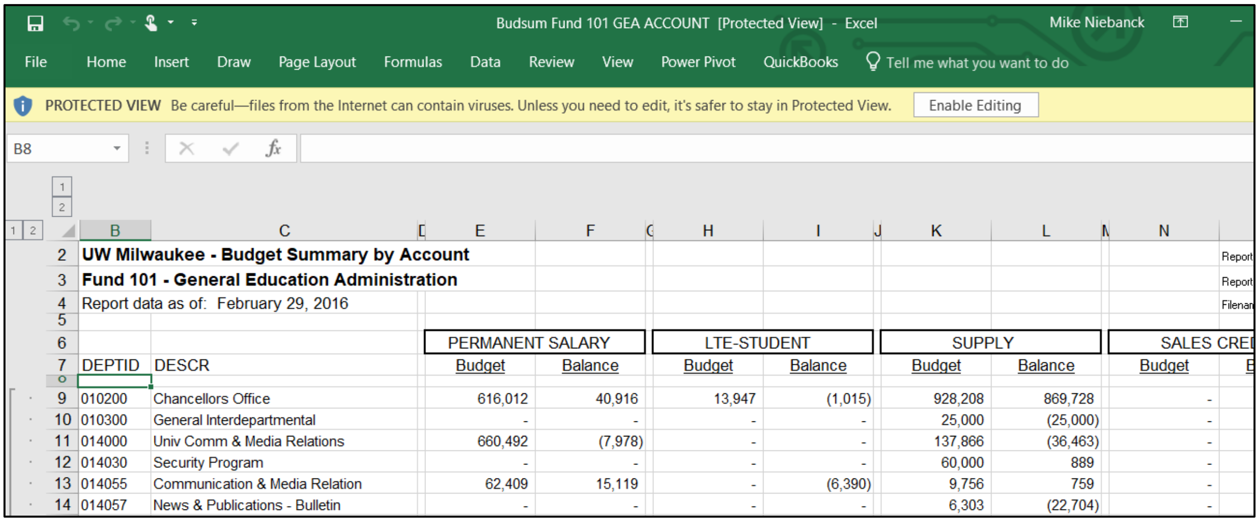
13. Once successful, click on the link to return to Report Request and go to the link to Report Manager.





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.





UW Milwaukee - Budget Summary by Account

Fund 101 - General Education Administration

Report data as of: February 29, 2016

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