



# University of Wisconsin System SFS Business Process Running nVision Reports On the Web

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## Running nVision Reports Process Overview

The UW nVision (bolt-on) Report Submit Center in SFS 9.1 is no longer available to run nVision Reports in SFS 9.2. There are delivered methods to run reports which are explained below.

**Reporting Console** - Access nVision Report Requests from Reporting Console. For more information on this please see document “Overview of the Reporting Console” on Shared Services Website under Training and Documentation which details this process:

[https://www.wisconsin.edu/sfs/download/sfs\\_9.2\\_upgrade/9.2\\_docs\\_and\\_training/rpt\\_-\\_reporting/Reporting-Console-Overview.pdf](https://www.wisconsin.edu/sfs/download/sfs_9.2_upgrade/9.2_docs_and_training/rpt_-_reporting/Reporting-Console-Overview.pdf)

**PS/nVision Report Request** – Navigate to Report Request – Reporting Tools> PS/nVision> Define Report Request

Also, see the document “Different Navigations to Reporting Console” at the above url for ways to setup shortcuts to access and run reports.

<b>Process Frequency</b>	This process is performed on an “as needed” basis.
<b>Dependencies</b>	A related layout must exist prior to running an nVision report.
<b>Assumptions</b>	None
<b>Responsible Parties</b>	All registered users of nVision.
<b>Alternate Scenarios</b>	None

## Process Detail

### I. Report Selection

*Navigation:* – From NavBar: Navigator > Reporting Tools> PS/nVision> Define Report Request

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The screenshot shows the 'NavBar: Navigator' window. On the left, there are three sections: 'Recent Places' with a calendar icon, 'My Favorites' with a star icon, and 'Navigator' with a document icon. The main area displays a 'Reporting Tools' menu with a back arrow and a home icon. The menu items are: 'Composite Query' (highlighted in yellow), 'Query', 'Connected Query', and 'PS/nVision'. Each item has a right-pointing arrow.

The screenshot shows the 'NavBar: Navigator' window with the 'PS/nVision' menu selected. The left sidebar remains the same. The main area displays the 'PS/nVision' menu with a back arrow and a home icon. The menu items are: 'Define Report Book', 'Register Drilldown Layout', and 'Define Report Request'. Each item has a right-pointing arrow.

Enter Business Unit and Report ID, click Search

The screenshot shows the 'Report Request' search form. At the top, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this are two buttons: 'Find an Existing Value' and 'Add a New Value'. A section titled 'Search Criteria' has a dropdown arrow. Below this are three input fields: 'Business Unit' with a 'begins with' dropdown and a search icon, 'Report ID' with a 'begins with' dropdown, and 'Description' with a 'begins with' dropdown. There is a checkbox for 'Case Sensitive'. At the bottom are buttons for 'Search', 'Clear', 'Basic Search' (with a magnifying glass icon), and 'Save Search Criteria'.

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## Report Request

Enter any information you have and click Search. Leave fields blank

[Find an Existing Value](#)







[Add a New Value](#)

### ▼ Search Criteria

Business Unit   

Report ID

Description

nVision Report Request		Advanced Options	Query Prompts
Business Unit:	UWMSN	Report ID:	BUDGTBAL
Report Title:	<input type="text" value="Budget Balance Analysis"/>		<a href="#">Copy to Another Business Unit / Clo</a> <a href="#">Delete This Report Request</a> <a href="#">Transfer to Report Books</a> <a href="#">Process Monitor</a> <a href="#">Report Manager</a> <a href="#">Share This Report Request</a>
*Layout:	<input type="text" value="8_8_BUDGETBAL1"/>		
<b>▼ Report Date Selection</b>			
*As Of Reporting Date:	<input type="text" value="Specify"/>	<input type="text" value="07/01/2018"/>	
*Tree As Of Date:	<input type="text" value="Use As Of Reporting Date"/>		
<input checked="" type="checkbox"/> Override Tree As of Date if Specified in Layout			
<b>▼ Output Options</b>			
*Type:	<input type="text" value="Web"/>		
*Format:	<input type="text" value="Microsoft Excel Files (*.xls)"/>		
<a href="#">Scope and Delivery Templates</a>			
<input type="button" value="Run Report"/>			
			 
Save	Return to Search	Notify	Add Update/Display

## Report Date Selection

1. Enter the As Of Reporting Date:
  - a. Business Unit Reporting Date – date specified on the GL Business Unit
  - b. Specify – enter the date you wish
  - c. Today's Date

Business Unit Reporting Date
Default
<b>Specify</b>
Today's Date

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**Tree As Of Date** = Use As Of Reporting Date

### Output Options

#### Type

Web – runs report to Report Manager

Window – Runs report to a window

File – used in 2 tier and not on the Web

#### Format


Default format is Excel

If **Scope** is set up for this report it can be accessed by selecting the “Scope and Delivery Template” hyperlink in the **Output Options** section. To update the Scope, select Scope Definition:

nVision Web Output

Business Unit: UWMSN Report ID: BUDGTBAL

Report Scope:


 Enter your report scope. [Scope Definition](#)

Scope Definition


Enter any information you have and click Search. Leave fields blank for

Find an Existing Value Add a New Value

▼ Search Criteria

SetID begins with ▼ UWMSN 

Report Scope begins with ▼

Search Clear Basic Search  Save Search Criteria

Search Results

View All First 1-13 of 13 Last

SetID	Report Scope	Description
UWMSN	DIV_LVL2	Level 2 Division
UWMSN	DIV_LVL3	Level 2 Division

If your report is Query based the Query Prompts may require updating. Go to the Query Prompts tab to update:

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nVision Report Request | Advanced Options | **Query Prompts**

**Business Unit:** UWMSN **Report ID:** AP\_TO\_GL

Query Prompts Find First 1 of 8 Last

**Query Name** UW\_NVS\_APGL\_APA\_1

Prompt Name	Prompt Value
BUSINESS_UNIT	UWMSN
JOURNAL_DATE	2018-04-30

\*\*\*Use "Update Parameters" link to enter prompt values to ensure correct format\*\*\*

Please note that some reports contain more than one Query and more than one Prompt.

Requiring updates to all query prompts:

Query Prompts Find First 2 of 8 Last

**Query Name** UW\_NVS\_APGL\_APA\_2

Prompt Name	Prompt Value
BUSINESS_UNIT	UWMSN
JOURNAL_DATE	2018-04-30

Once all the Prompts are updated, Save the Report Request.

## II. Running the Report

1. Click on **Run Report** button to start the report

## University of Wisconsin System SFS Business Process Running nVision Reports On the Web

nVision Report Request
Advanced Options
Query Prompts

Business Unit: UWMSN Report ID: AP\_TO\_GL

Copy to Another Business Unit / Clone  
Delete This Report Request  
Transfer to Report Books  
Process Monitor  
Report Manager  
Share This Report Request

Report Title: Tie AP Entries to GL Jnl Gen

\*Layout: UW\_88\_BOLT\_AP\_TIE\_AP\_TO\_GL

Report Date Selection

\*As Of Reporting Date: Specify 05/31/2018

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

Output Options

\*Type: Window

\*Format: Microsoft Excel Files (\*.xls)

Run Report

The Process Scheduler Request page populates, Server Name = SFSNT1. Set Recurrence if desired - note that you will need to reset the Run Date after selecting Recurrence. OK

Process Scheduler Request

User ID 00373760 Run Control ID

Server Name SFSNT1

Recurrence Daily 3 am

Run Date 01/11/2008

Run Time 3:00:00AM

Reset to Current Date

Process List

Select	Description
<input checked="" type="checkbox"/>	nVision Report

OK Cancel

Process Type	*Type	*Format
nVision Report	Default	Default

This message may populate....close this and return to Report Request and select Process Monitor:



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## Queued

**Process Name:** NVSRUN      nVision Report  
**Process Instance:** 10026741      **Process Type:** nVision-Report

## Process Monitor

Process List | Server List

**View Process Request For**

User ID: 00913865    Type:    Last    3 Days    Refresh

Server:    Name:    Instance From:    Instance To:    Run Status:    Distribution Status:    ☒ Save On Refresh

**Process List**    Personalize | Find | View All |    First 1 of 1 Last

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	9360866		nVision Report	NVSRUN	00913865	09/18/2018 4:54:45PM CDT	Initiated	N/A	<a href="#">Details</a>

Verify the process runs to success then navigate to Report Manager or return to Report Request and select Report Manager.

nVision Report Request | Advanced Options | Query Prompts

**Business Unit:** UWMSN **Report ID:** AP\_TO\_GL    [Copy to Another Business Unit / Clone](#)  
[Delete This Report Request](#)  
[Transfer to Report Books](#)  
[Process Monitor](#)  
[Report Manager](#)  
[Share This Report Request](#)

**Report Title:** Tie AP Entries to GL Jnl Gen

**\*Layout:** UW\_88\_BOLT\_AP\_TIE\_AP\_TO\_GL

**Report Date Selection**

**\*As Of Reporting Date:** Specify    03/31/2018   

**\*Tree As Of Date:** Use As Of Reporting Date



# University of Wisconsin System SFS Business Process Running nVision Reports On the Web

List
Explorer
Administration
Archives

**View Reports For**  
User ID  Type:    
Status  Folder  Instance  to

**Report List**
Personalize | Find | View All | First  Last

Select	Report ID	Prs Instance	Description	Request Date/Time	Format	Status	Details
<input type="checkbox"/>	7167799	9360866	Tie AP Entries to GL Jnl Gen	09/18/2018 4:59:17PM	Microsoft Excel Files (*.xls)	Posted	<a href="#">Details</a>

Select the report hyper-link and the report should download to your PC where you will be prompted to Open or Save the report

What do you want to do with Tie%20AP%20Entries%20to%20GL%20Jnl%20Gen.xlsx?  
From: test.sfstest.wisconsin.edu

Open
Save
^
Cancel
X





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**Revision History**

Author	Version	Date	Description of Change
Mike Niebanck	1.0	9/16/2018	Final