

Improvements to nVision Reporting

The Emory nVision reporting environment has been improved. Now when you use the reporting environment, you will have more dependable and flexible reporting:

- When you run an nVision report, other reports will not overwrite yours.
- You can create templates that allow you to run your own private reports, rather than public reports, and no one else can change those templates.
- You can run multiple reports with a single click.
- You can run reports automatically.
- A “closing reporting date” functionality has been activated, especially to use for reports that you run automatically.
- Reports you run will remain in Report Manager for 90 days, rather than being available only on the day they were run.

Why the changes were made

Previously, many Compass nVision reports were run as public reports. When you run a public report, you select report request values – parameters – that are available to everyone. The problem is that anyone with security access to run an nVision report can change and save public report parameters.

If another user changes the parameters for a specific nVision report after you have saved your parameters but before your report actually runs, your report’s parameters will be overwritten, resulting in either the failure of your report to run or your report running with parameters the other user entered. This type of error was occurring frequently in the Compass reporting environment.

What changes were made

To prevent the problem the following changes were made:

- Public report request parameters cannot be changed.
- Now you can clone a report, save your clone as a private report, and change any report request parameters you want. No one will be able to change your private report request values when you run a private report.

Creating and Running Private Reports

You can use the standard nVision public reports as templates to create private report requests.

Overview

The process is a simple 4-step process, and you need to do it only once for each private report you want to run:

1. Select the public report you want to use as the template for your private report.
2. Clone it and give it a name that will be easy for you to find in the future.

WARNING: DO NOT SECURE THE PUBLIC REPORT USED FOR CLONING – THIS ACTION MAKES THE PUBLIC REPORT UNAVAILABLE TO ALL OTHERS FOR USE IN THE CLONING PROCESS

3. Open the clone.
4. Change the **Access Mode** from **Public** to **Secured** and save the report. You now have your private report clone that will not be overwritten when you run it.

Creating a Private Report

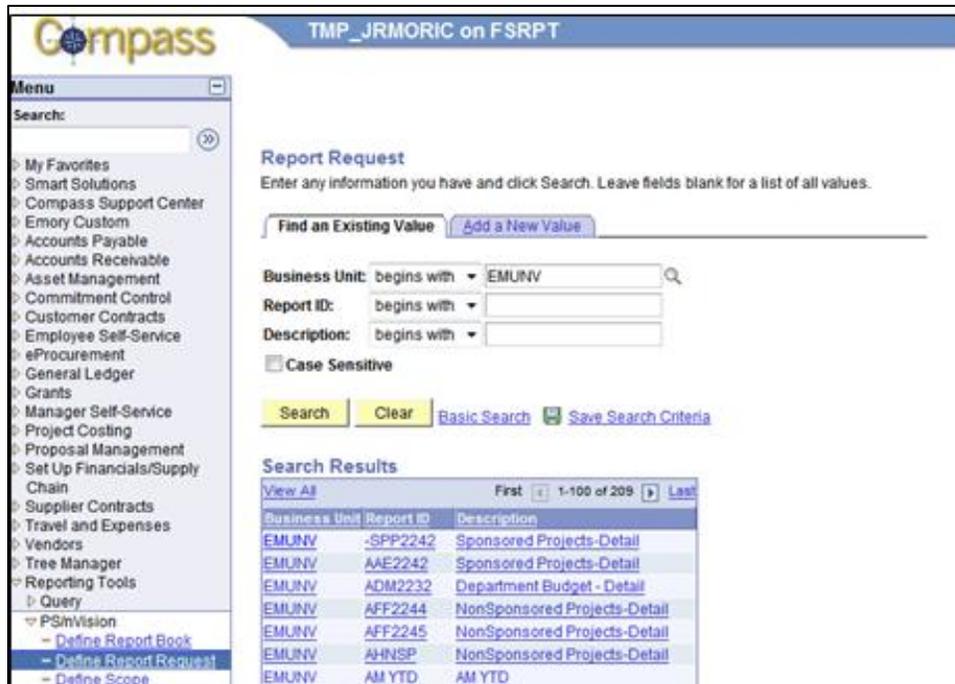
You should do your reporting from the Compass Reporting environment (RPT). Remember, your report output will remain in Report Manager for 90 days, not just a single day.

Use the following instructions to create a private report request.

Step 1: Select the report

1. Log in to the RPT environment (<https://compass-reports.emory.edu>)
2. From the Compass home page, use the following path to navigate to the Report Request page:
Reporting Tools > PS/nVision > Define Report Request
3. Complete the Business Unit field.
4. Click the Search button.

A list of reports for the selected business unit displays.



Compass TMP_JRMORIC on FSRPT

Report Request
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value Add a New Value

Business Unit: begins with EMUNV

Report ID: begins with

Description: begins with

Case Sensitive

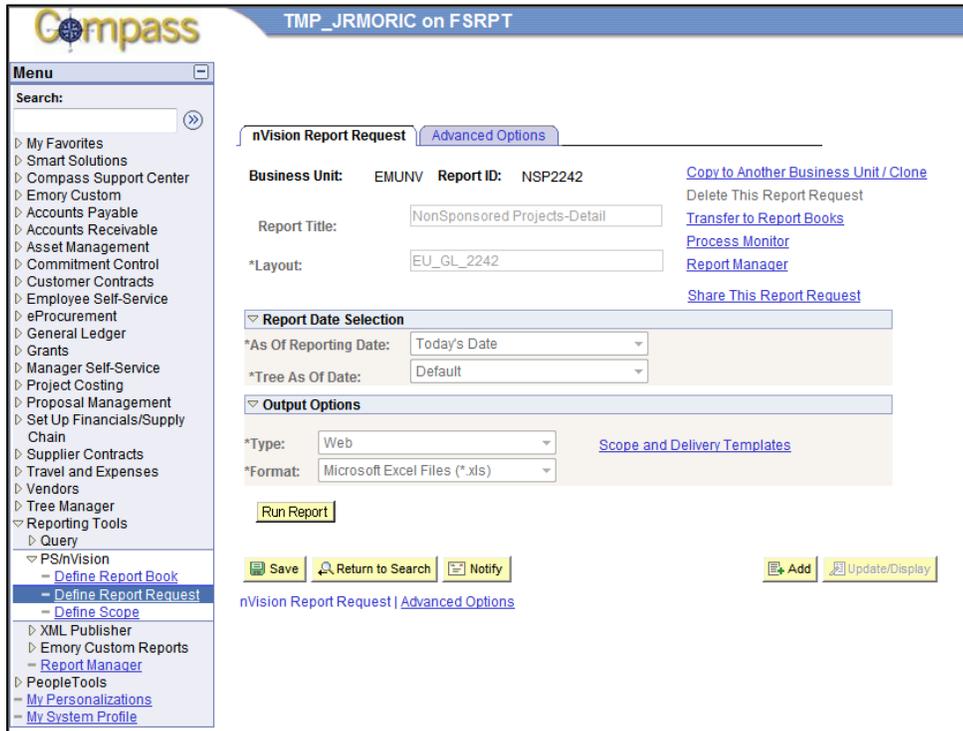
Search Clear Basic Search Save Search Criteria

Search Results
View All First 1-100 of 209 Last

Business Unit	Report ID	Description
EMUNV	-SPP2242	Sponsored Projects-Detail
EMUNV	AAE2242	Sponsored Projects-Detail
EMUNV	ADM2232	Department Budget - Detail
EMUNV	AFF2244	NonSponsored Projects-Detail
EMUNV	AFF2245	NonSponsored Projects-Detail
EMUNV	AHNSP	NonSponsored Projects-Detail
EMUNV	AM YTD	AM YTD

5. Find and click the name of the report you want to run.

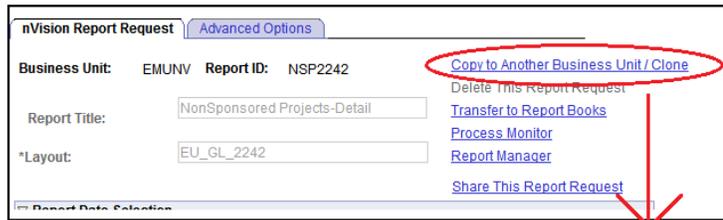
The nVision Report Request page displays.



With few exceptions, all the parameter fields are blocked. For instance, you can see the **As Of Reporting Date**, but you can't change it. Also, you can see the Advanced Options page and the Scope and Delivery page by clicking the tab or the link, respectively, but you cannot change the information on those pages.

Step 2: Clone the report and name it

1. Click the **Copy to Another Business Unit/Clone** link.



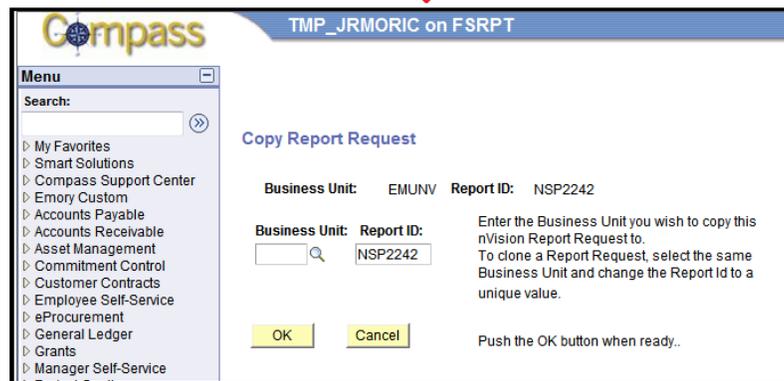
nVision Report Request **Advanced Options**

Business Unit: EMUNV Report ID: NSP2242 [Copy to Another Business Unit / Clone](#)

Report Title: NonSponsored Projects-Detail

*Layout: EU_GL_2242

[Delete This Report Request](#)
[Transfer to Report Books](#)
[Process Monitor](#)
[Report Manager](#)
[Share This Report Request](#)



Compass TMP_JRMORIC on FSRPT

Menu

Search:

- My Favorites
- Smart Solutions
- Compass Support Center
- Emory Custom
- Accounts Payable
- Accounts Receivable
- Asset Management
- Commitment Control
- Customer Contracts
- Employee Self-Service
- eProcurement
- General Ledger
- Grants
- Manager Self-Service

Copy Report Request

Business Unit: EMUNV Report ID: NSP2242

Business Unit: Report ID: NSP2242

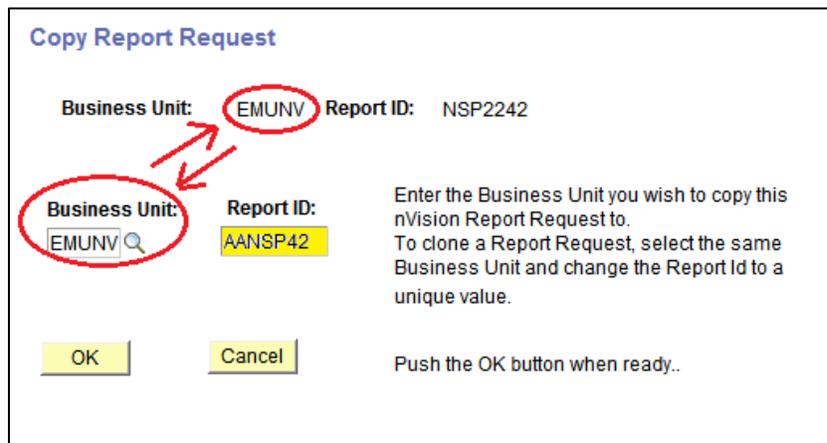
Enter the Business Unit you wish to copy this nVision Report Request to. To clone a Report Request, select the same Business Unit and change the Report Id to a unique value.

OK Cancel

Push the OK button when ready..

2. Enter the Business Unit. **Be sure to enter the same Business Unit in the Business Unit field. Do not change the name of the Business Unit from the public report you cloned. If you change the Business Unit name, the report may display incorrect data.**
3. Change the **Report ID** to something that is meaningful and will be easy for you to locate in the future. Remember that PeopleSoft sorts Report IDs alphabetically.

Note: A good practice is to use your initials as the first two characters of the Report ID.



Copy Report Request

Business Unit: EMUNV Report ID: NSP2242

Business Unit: Report ID: AANSP42

Enter the Business Unit you wish to copy this nVision Report Request to. To clone a Report Request, select the same Business Unit and change the Report Id to a unique value.

OK Cancel

Push the OK button when ready..

4. Click **OK**. If you receive a message that the Report ID already exists, cancel and enter a new Report ID.

WARNING: After you click OK, you are returned to the original Report ID, not the new Report ID. Therefore, the next step is critical.

Step 3: Open the clone

1. Click the **Return to Search** button to get back to the search page. Enter the Business Unit and any portion of your new report ID to find your new Report ID in the list. Select your new Report ID:

The screenshot shows the 'nVision Report Request' interface. The 'Business Unit' is 'EMUNV' and the 'Report ID' is 'NSP2242'. The 'Return to Search' button is circled in red. An arrow points from this button to the search results table. The search results table has the following data:

Business Unit	Report ID	Description
EMUNV	-SPP2242	Sponsored Projects-Detail
EMUNV	AAF2242	Sponsored Projects-Detail
EMUNV	AANSP42	NonSponsored Projects-Detail
EMUNV	ADM2232	Department Budget - Detail
EMUNV	AFF2244	NonSponsored Projects-Detail
EMUNV	AFF2245	NonSponsored Projects-Detail
EMUNV	AHNSP	NonSponsored Projects-Detail
EMUNV	ΔM YTD	ΔM YTD

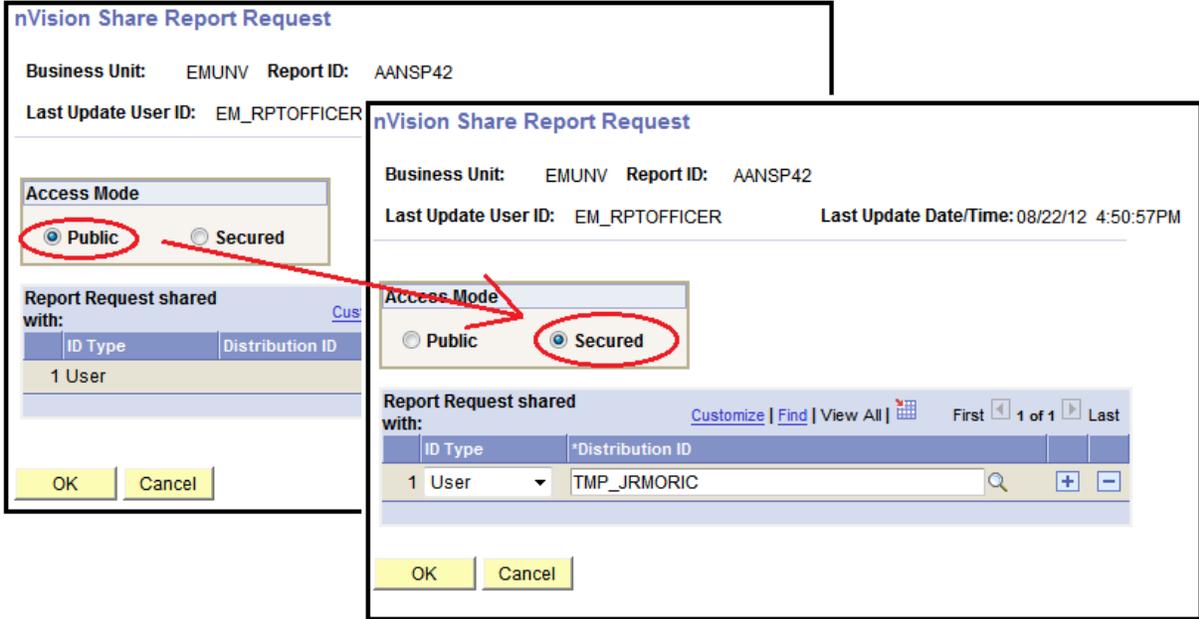
2. Click the **Share This Report Request** link.

The screenshot shows the 'nVision Report Request' interface. The 'Business Unit' is 'EMUNV' and the 'Report ID' is 'AANSP42'. The 'Share This Report Request' link is circled in red. The interface also shows the 'Return to Search' button and the 'Run Report' button.

Step 4: Change the access mode

The **Access Mode** is set to **Public** for the report.

1. Click **Secured** to make the report private:



nVision Share Report Request

Business Unit: EMUNV Report ID: AANSP42

Last Update User ID: EM_RPTOFFICER

Access Mode

Public Secured

Report Request shared with:

ID Type	Distribution ID
1 User	

OK Cancel

nVision Share Report Request

Business Unit: EMUNV Report ID: AANSP42

Last Update User ID: EM_RPTOFFICER Last Update Date/Time: 08/22/12 4:50:57PM

Access Mode

Public Secured

Report Request shared with:

Customize | Find | View All | First 1 of 1 Last

ID Type	*Distribution ID
1 User	TMP_JRMORIC

OK Cancel

Note that your User ID is displayed in the **Report Request shared with** field.

2. To share your private report with another user, click the + button. Select **User** from the drop-down menu in the **ID Type** field. Click the spy glass to select the user's ID in the **Distribution ID** field.

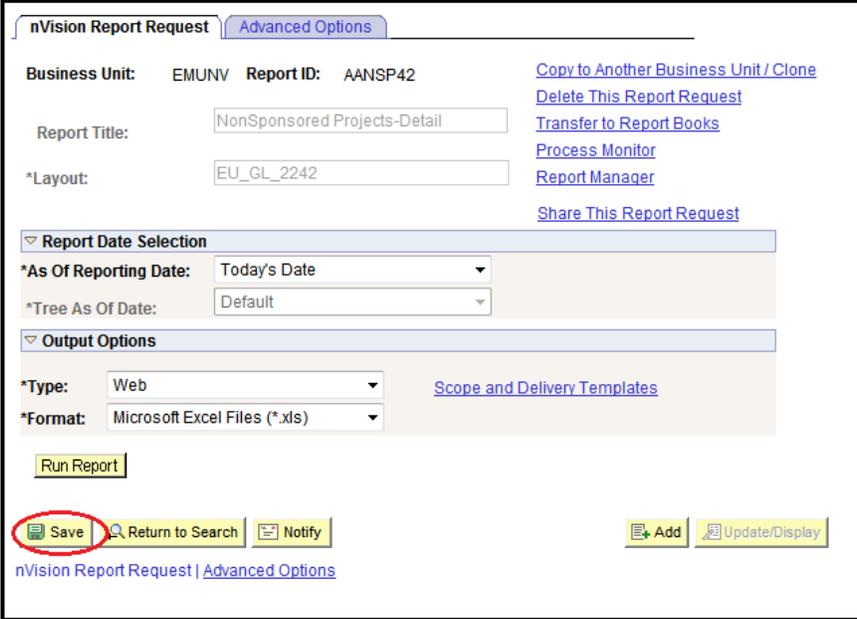
Note: Anyone you share your report with can change the report's parameters, so you may want to share reports only on a temporary basis. You can delete any user in the shared field list by clicking the – button next to the + button.

3. Click OK to return to the main report request screen.

4. Click **Save**. The private report request is saved. **WARNING: FAILING TO CLICK THE SAVE BUTTON WILL REQUIRE YOU TO REPEAT THE CLONING PROCESS**

Only you have access to the report now, and you can run the private report any time you need it. You can also delete your private report at any time.

Note: Parameter fields that were inactive on the public report request are now available for you to change. However, some fields, such as **Layout** and **Tree As Of Date**, are secured and can only be changed by a developer.



nVision Report Request [Advanced Options](#)

Business Unit: EMUNV Report ID: AANSP42 [Copy to Another Business Unit / Clone](#)
[Delete This Report Request](#)
[Transfer to Report Books](#)
[Process Monitor](#)
[Report Manager](#)
[Share This Report Request](#)

Report Title:

*Layout:

Report Date Selection

*As Of Reporting Date:

*Tree As Of Date:

Output Options

*Type: [Scope and Delivery Templates](#)

*Format:

[nVision Report Request | Advanced Options](#)

Creating and Running nVision Report Books

You can use nVision report books to run multiple reports with one click.

Previously, Compass users had limited access to report books. Now most Compass users can create and run report books in the Compass Reporting environment.

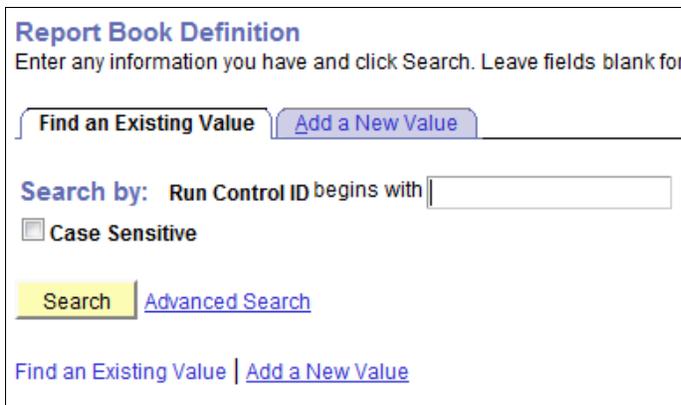
A report book is a run control. Therefore, you can use only the report books you create and no one else can use yours.

Creating nVision Report Books

Use the following instructions to create report books:

1. From the Compass home page, use the following path to navigate to the Report Books page:
Reporting Tools > PS/nVision > Define Report Books

The following screen displays:



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

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

Search by: Run Control ID begins with

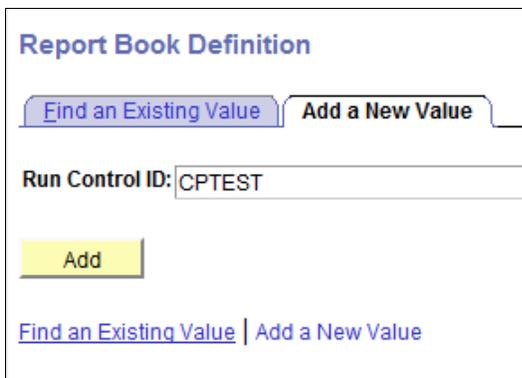
Case Sensitive

[Search](#) [Advanced Search](#)

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

Note: If you use the Search function on this screen, only the IDs in your report book are displayed.

2. To create a new report book, click the **Add a New Value** tab:



Report Book Definition

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

Run Control ID:

[Add](#)

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

3. Enter a new Run Control (report book) ID, and click **Add**. The following screen displays:

Report Book

Run Control ID: CPTST [Report Manager](#) [Process Monitor](#) [Run](#)

Run Parameters

As Of Date: Ignore Runtime Errors

Tree Effective Date:

Report Requests [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Seq	Business Unit	*Report ID	Run		
1	<input type="text" value=""/> <input type="text"/>	<input type="text" value=""/> <input type="text"/>	View	<input checked="" type="checkbox"/>	+ -

[Save](#) [Notify](#)

4. Add business units and report request IDs you want to run in a single batch to the report book.

Report Book

Run Control ID: CPTST [Report Manager](#) [Process Monitor](#) [Run](#)

Run Parameters

As Of Date: Ignore Runtime Errors

Tree Effective Date:

Report Requests [Customize](#) | [Find](#) | [View All](#) | First 1-2 of 2 Last

Seq	Business Unit	*Report ID	Run		
1	<input type="text" value="EMUNV"/> <input type="text"/>	<input type="text" value="CP44_062"/> <input type="text"/>	View	<input checked="" type="checkbox"/>	+ -
2	<input type="text" value=""/> <input type="text"/>	<input type="text" value=""/> <input type="text"/>	View	<input checked="" type="checkbox"/>	+ -

5. After the first RID is entered, click the + button to the right of that row to add a new row.

Report Book

Run Control ID: CPTEST [Report Manager](#) [Process Monitor](#) [Run](#)

Run Parameters

As Of Date: Ignore Runtime Errors

Tree Effective Date:

Report Requests [Customize](#) | [Find](#) | [View All](#) | [First](#) | 1-3 of 3 | [Last](#)

Seq	Business Unit	*Report ID	Run		
1	EMUNV <input type="text" value=""/>	CP44_062 <input type="text" value=""/>	<input checked="" type="checkbox"/>	View	<input type="button" value="+"/> <input type="button" value="-"/>
2	EMUNV <input type="text" value=""/>	CP44_063 <input type="text" value=""/>	<input checked="" type="checkbox"/>	View	<input type="button" value="+"/> <input type="button" value="-"/>
3	EMUNV <input type="text" value=""/>	CP44_064 <input type="text" value=""/>	<input checked="" type="checkbox"/>	View	<input type="button" value="+"/> <input type="button" value="-"/>

[Save](#) [Notify](#)

Notes:

- The **As Of Date** you save overrides any other **As Of Date** specified in the report ID definition.
- Always use the default **Use As Of Reporting Date** in the **Tree Effective Date** field.
- Uncheck **Ignore Runtime Errors** if you want the report book to stop running if it encounters errors on any of the report IDs in the book. When the **Ignore Runtime Errors** box is checked, the next report ID will start running if an error is encountered. Normally, you should check this option.
- If you do not want a specific report to run, uncheck the **Run** option for that report ID.

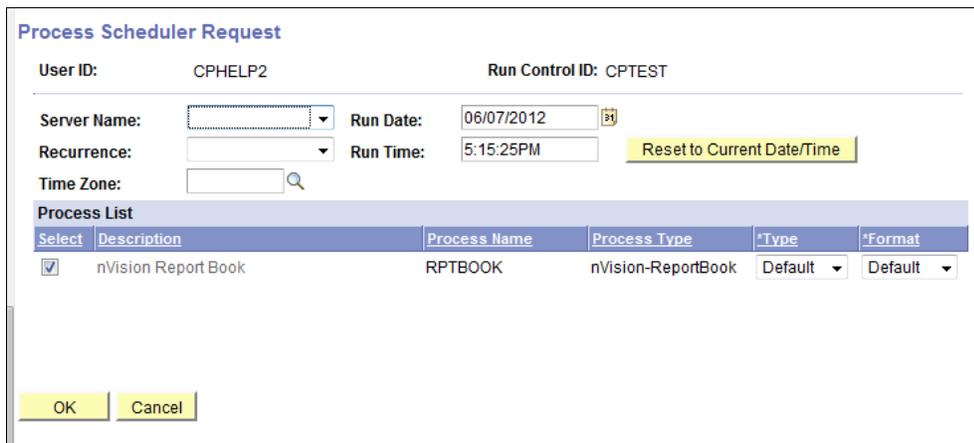
6. Click **Save**.

Running an nVision Report Book

Use the following instructions to run a report book:

1. From the Compass home page, use the following path to navigate to the Report Books page:
Reporting Tools > PS/nVision > Define Report Books
2. Enter your run control ID, click **Search**, and select the report book you want to run.
3. Click **Run**.

The following screen displays:



Process Scheduler Request

User ID: CPHELP2 Run Control ID: CPTST

Server Name: Run Date: 06/07/2012

Recurrence: Run Time: 5:15:25PM [Reset to Current Date/Time](#)

Time Zone:

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	nVision Report Book	RPTBOOK	nVision-ReportBook	Default	Default

[OK](#) [Cancel](#)

4. Click **OK**. The report book runs.

Note: If you want to change the type of output, click the drop-down menu under **Type** and change the type of output; then click **OK**.

Recurring Report Requests

You can run both individual report requests and report books automatically on a recurring basis.

Setting Up Recurring Report Requests

The process for setting up individual report requests and report books to run automatically is similar.

1. From the Compass home page, use the following path to navigate to the PS/nVision page:
Reporting Tools > PS/nVision

The following screen displays:



2. Select either **Define Report Book** or **Define Report Request**. **This is the only difference in setting up a report request or a report book to run automatically on a recurring basis.**

Note: If you are running a report request, make sure you select one of your private report requests.

3. Click **Run**. The Process Scheduler Request page displays.

Process Scheduler Request

User ID: CPHELP2 Run Control ID: CPTTEST

Server Name: Run Date: 06/07/2012

Recurrence: Run Time: 5:15:25PM

Time Zone:

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	nVision Report Book	RPTBOOK	nVision-ReportBook	Default	Default

- Click the **Recurrence** drop-down and select an occurrence. This tells the process when to run and what frequency -- for instance the 10th of each month.

Process Scheduler Request

User ID: CPHELP2

Server Name:

Recurrence: **EM GM Monthly**

Note: To see a list of recurrence definitions, go to PeopleTools > Process Scheduler > Recurrences, and click **Search**.

Recurrence Definitions

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

Search by: Recurrence Name begins with

Case Sensitive

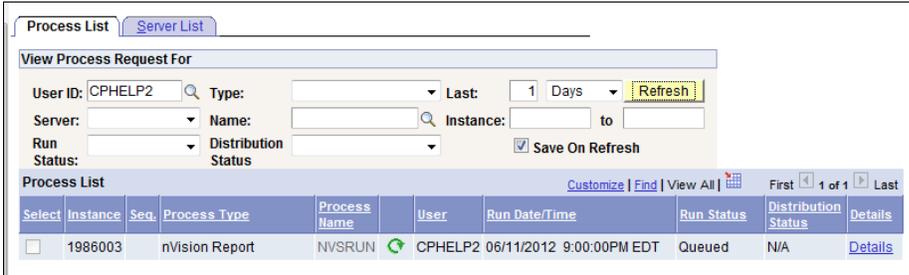
[Advanced Search](#)

Search Results

[View All](#)
First 1-100 of 131 Last

Recurrence Name	Recurrence Description
6PM_Sun_Fri	6PM_Sun_Fri
DAILY_4_7	DAILY_4_7
DAILY_8_to_8	DAILY_8_to_8
Daily	Daily
Daily Purge	Daily Purge
Daily Search Rebuild	Daily Search Rebuild
EM 2:00 AM Tues	EM 2:00 AM Tues
EM Daily 10:00 AM M-F	EM Daily 10:00 AM M-F
EM Daily 10:00 AM S-S	EM Daily 10:00 AM S-S
EM Daily 10:00 PM M-F	EM Daily 10:00 PM M-F
EM Daily 10:00 PM S-S	EM_Daily 10:00 PM S-S
EM Daily 10:15 PM S-T	EM Daily 10:15 PM S-T

- After the Recurrence has been selected on the Process Scheduler Request page, click **OK**. The following screen displays in the Process Monitor. The report or report book remains in **Queued** status until it is time to run.



The screenshot shows the 'Process Monitor' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below the tabs is a 'View Process Request For' form with the following fields:

- User ID: CPHELP2 (with a search icon)
- Type: [Dropdown]
- Last: 1 Days (with a dropdown and a 'Refresh' button)
- Server: [Dropdown]
- Name: [Text field with search icon]
- Instance: [Text field] to [Text field]
- Run Status: [Dropdown]
- Distribution Status: [Dropdown]
- Save On Refresh

Below the form is a 'Process List' table with the following columns: Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The table contains one row of data:

Select	Instance	Seq	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1986003		nVision Report	NVSRUN	CPHELP2	06/11/2012 9:00:00PM EDT	Queued	N/A	Details

Note: If you entered **Today's Date** or **Business Unit Reporting Date** in the **As Of Reporting Date** field when you created the report request or report book, your report can run automatically without the need to maintain the **As Of Reporting Date**. However, if you specified a date, after the occurrence runs, you will need to return to the report request or report book and update the parameters for the request to use a different As Of Reporting Date.

Appendix

As Of Reporting Date

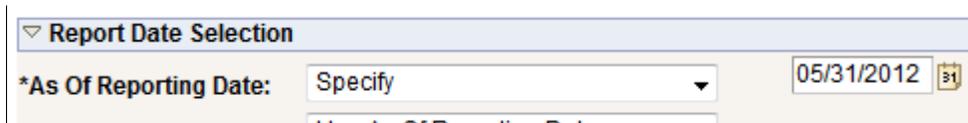
For both individual report requests and report books, the **As Of Reporting Date** operates the same way.

You can enter **Specify, Today's Date, or Business Unit Reporting Date** in the **As Of Reporting Date** field. The option you select is significant, as explained in the following sections.

Entering Specify in the As Of Reporting Date Field

The **As Of Reporting Date** value tells the report run process how to interpret TimeSpan variables coded in the layout such as Year-to-Date and Month-to-Date. For instance, if the **As Of Reporting Date** value is 5/31/2011, then the report run process will interpret the TimeSpan variable for Year-to-Date as the Accounting Period and Fiscal Year values within the range 9/1/2010 – 5/31/2011.

If you select **Specify** from the **As Of Reporting Date** field drop-down, you must select a date in the adjacent field.



Report Date Selection

*As Of Reporting Date: Specify 05/31/2012

If you select a specific date for this field, the output information from the report request or report book will be as of that date.

Entering Today's Date in the As Of Reporting Date Field

If you select **Today's Date** from the **As Of Reporting Date** field drop-down, the report request's report output information will be as of today's date. This is useful if you know that every time you'll be running the report, the As Of Reporting Date should be the run date.

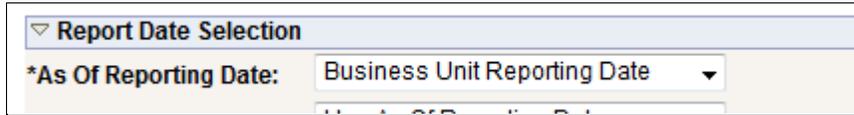
The **As Of Reporting Date** field drives which accounting periods are displayed in the report, with no distinction given to days within a month. That is, there is no difference, from a reporting standpoint, of entering 5/1/2012 or 5/31/2012. Both dates will produce a report for the same accounting period.

Entering Business Unit Reporting Date in the As Of Reporting Date Field

A new process has been activated in the Compass Reporting environment that enables the concept of "closing reporting date."

Within the monthly closing cycle, it's common to run a particular report daily, starting around the 20th of the month, with an As Of Reporting Date equal to the current month, and keep using that same As Of Reporting Date until after that month has closed, perhaps the 15th of the following month.

This new process updates each General Ledger business unit's Reporting Date to the current month's ending date on the 20th of each month. This change allows you to select **Business Unit Reporting Date** from the **As Of Reporting Date** field drop-down.



The screenshot shows a software interface with a section titled "Report Date Selection". Below this title is a label "*As Of Reporting Date:" followed by a dropdown menu. The dropdown menu is currently set to "Business Unit Reporting Date".

When you select Business Unit Report Date, if your request is run

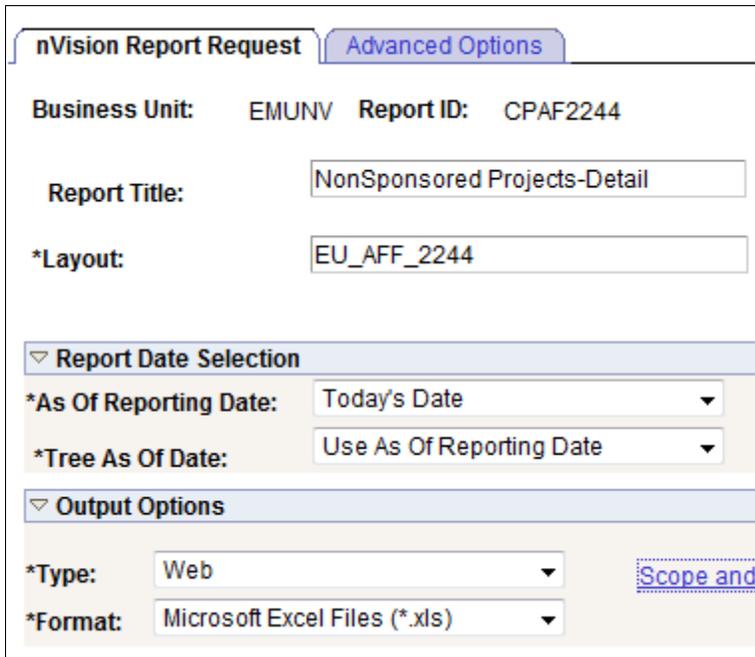
- Before the 20th of the month, the As Of date will be the previous month
- On or after the 20th of the month, the As Of date will be the current month

... and thus can be used on report books or report requests that always need the closing reporting date.

Creating a Report Book Containing Reports with Different Scopes

Use the following example to create report books containing reports with different scopes.

1. Assume your Report ID is CPAF2244, as in the following example:



nVision Report Request Advanced Options

Business Unit: EMUNV **Report ID:** CPAF2244

Report Title:

***Layout:**

▼ **Report Date Selection**

***As Of Reporting Date:** ▼

***Tree As Of Date:** ▼

▼ **Output Options**

***Type:** ▼ [Scope and](#)

***Format:** ▼

Also assume that the following is one of the scopes you want to run scope:



nVision Web Output

Business Unit: EMU

Report Scope:

🔍 Ent

2. Save this private report request as CP44_064 using the **Copy to Another Business Unit/Clone** link.
3. If you want to run project 00000063, change the scope ID to P:00000063 and save the report request as CP44_063.
4. If you also want to run project 00000062, change the scope ID to P:00000062 and save the report request as CP44_062.