Why are We Making Changes?

• To prevent nVision run time errors or unexpected scope changes
  - Prevents run time errors that require a system restart to allow continuation of campus reporting
  - Prevents running one scope and receiving results from a different scope
  - Prevents user requests for invalid run date parameters
  - Provides functionality to eliminate the need for unsupported user practices

• To increase the efficiency of the report request process
  - Run multiple reports with a single (or fewer) clicks
  - Run reports automatically and/or on a scheduled basis
  - Longer retention of reporting results

• To prepare the technology in the RPT environment to allow for the scheduling and delivery of nVision reports
What Changes are We Making?

• Public report request parameters will no longer be changed by the users
  ➢ Changes in reporting user interface will require users to create private report requests via a clone of a public report request

• Report runs will be from private report requests instead of from public report requests
  ➢ Users will run reports leveraging the private request instead of the public report requests
  ➢ Only those that you specifically grant access can make changes to your private requests
  ➢ The use of private requests prevents multiple reporting users across campus from “stepping on each other”

• Introduction of a relative “as of reporting date” equal to the last month end date

• Users will be allowed to create Report Books that allow users to run multiple reports with a single request

• New functionality will allow for automated run of reports
  ➢ Users will be allowed to define recurrence schedules so that there reports will run automatically on a recurring basis.
  ➢ Reports will be retained in the Report Manager for a period of 90 days instead of being purged on a daily basis.
Creating a private report

Step 1: Select the Report

![Image of a computer screen showing a report selection interface with options for advanced settings, report title, business unit, report ID, layout, report date selection, and output options including type, format, and scope and delivery templates.](image-url)
Creating a private report

Step 2: Clone the report and name it
Creating a private report

Step 2: Clone the report and name it
The following page displays.

Do Not Change

Change
Creating a private report

Step 3: Open the clone

Your new clone
Creating a private report

Step 3: Open the clone
The following page displays.

Click here
Creating a private report

Step 4: Change the access mode

Click here to share your request with others.

This will be your ID.
Creating a private report

Step 5: Save the report

- Click Save.

- The private report request is saved.

- 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 be changed only by a developer.
Creating an nVision Report Book

Navigate to the Report Book Definition Page:
Reporting Tools > PS/nVision > Define Report Books

Click the Add a New Value tab

Enter a new Run Control (report book) ID, and click Add
Creating an nVision Report Book

Add Parameters

<table>
<thead>
<tr>
<th>Report Book</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Control ID: CPTEST</td>
</tr>
<tr>
<td>Run Parameters</td>
</tr>
<tr>
<td>As Of Date: Today's Date</td>
</tr>
</tbody>
</table>

### Report Requests

<table>
<thead>
<tr>
<th>Seq</th>
<th>Business Unit</th>
<th>*Report ID</th>
<th>Close</th>
<th>Run</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>EMUNV63</td>
<td>CP44_052</td>
<td>View</td>
<td>+</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td></td>
<td>View</td>
<td></td>
</tr>
</tbody>
</table>
Creating an nVision Report Book

Save the Report Book

Click Save
Running an nVision Report Book

Navigate to the Report Book Definition Page:
Reporting Tools > PS/nVision > Define Report Books

- Enter your run control ID, click **Search**, and select the report book you want to run.
- Click **Run**.

The following screen displays:

![Process Scheduler Request]

To change the type of output, click the drop-down menu under **Type** and change the type of output.

Click **OK**. The report book runs.
Recurring Report Requests

Navigate to the PS/nVision Page: Reporting Tools > PS/nVision

Select one

This is the only difference in setting up a report request or a report book to run automatically on a recurring basis.
Recurring Report Requests

Click Run on the Report Book or Report Request page:
The Process Scheduler Request page displays

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