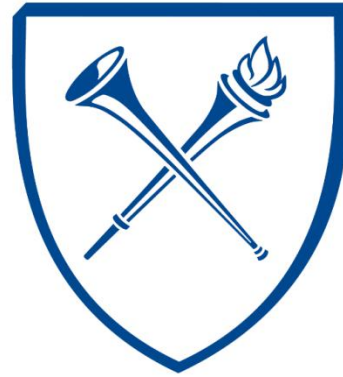


EMORY



nVision Reporting Improvements

July 27, 2012

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 their 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

Define Report Request - Internet Explorer provided by Emory University

https://compass-reports.emory.edu/psp/fsrpt/EMPLOYEE/ERP/c/REPORT_BOOKS.NVS_REPOR

SHALL04 on FSRPT

Home | Worklist | Add to Favorites | Sign out

Menu

- Inventory
- Inventory Policy Planning
- IT Asset Management
- Items
- Lease Administration
- Maintenance Management
- Manager Self-Service
- Manufacturing Definitions
- Order Management
- Pricing Configuration
- Product Configurations
- Production Control
- Products
- Program Management
- Project Costing
- Promotions
- Proposal Management
- Purchasing
- Quality
- Resource Management
- Risk Management
- SCM Integrations
- Services Procurement
- Set Up Financials/Supply Chain
- Sourcing
- Staffing

nVision Report Request [Advanced Options](#)

Business Unit: EMORY Report ID: CONSIG2 [Copy to Another Business Unit / Clone](#)

Report Title: Income Statement [Delete This Report Request](#)

*Layout: CONSOLIS_2 [Transfer to Report Books](#)

[Process Monitor](#)

[Report Manager](#)

[Share This Report Request](#)

Report Date Selection

*As Of Reporting Date: Specify 08/31/2011

*Tree As Of Date: Use As Of Reporting Date

Output Options

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

Format: Microsoft Excel Files (.xls)

Run Report

Internet | Protected Mode: Off

Creating a private report

Step 2: Clone the report and name it

Define Report Request - Internet Explorer provided by Emory University

https://compass-reports.emory.edu/psp/fsrpt/EMPLOYEE/ERP/c/REPORT_BOOKS.NVS_REPOR

Define Report Request

SHALL04 on FSRPT

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page

Menu

- Inventory
- Inventory Policy Planning
- IT Asset Management
- Items
- Lease Administration
- Maintenance Management
- Manager Self-Service
- Manufacturing Definitions
- Order Management
- Pricing Configuration
- Product Configurations
- Production Control
- Products
- Program Management
- Project Costing
- Promotions
- Proposal Management
- Purchasing
- Quality
- Resource Management
- Risk Management
- SCM Integrations
- Services Procurement
- Set Up Financials/Supply Chain
- Sourcing
- Staffing

nVision Report Request | Advanced Options

Business Unit: EMORY Report ID: CONSYS2 [Copy to Another Business Unit / Clone](#)

[Delete This Report Request](#)

Report Title: Income Statement [Transfer to Report Books](#)

*Layout: CONSOLIS_2 [Process Monitor](#)

[Report Manager](#)

[Share This Report Request](#)

Report Date Selection

*As Of Reporting Date: Specify 08/31/2011

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Output Options

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

Format: Microsoft Excel Files (.xls)

Run Report

Internet | Protected Mode: Off

Creating a private report

Step 2: Clone the report and name it

The following page displays.

Define Report Request - Internet Explorer provided by Emory University
https://compass-reports.emory.edu/psp/fsrpt/EMPLOYEE/ERP/c/REPORT_BOOKS.NVS_REPOR

Define Report Request

SHALL04 on FSRPT

Home | Worklist | Add to Favorites | Sign out

New Window | Help | Customize Page | net

Copy Report Request

Business Unit: EMORY Report ID: CONSIS2

Business Unit: Report ID:

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.

Push the OK button when ready..

OK Cancel

Do Not Change

Change

Creating a private report

Step 3: Open the clone

The screenshot shows the 'Define Report Request' page in Internet Explorer. The browser title is 'Define Report Request - Internet Explorer provided by Emory University'. The address bar shows 'https://compass-reports.e...'. The page header includes the 'Compass' logo and 'SHALL04 on FSRPT'. Navigation links include 'Home', 'Worklist', 'Add to Favorites', and 'Sign out'. A red arrow points to the 'Advanced Options' tab, with the text 'Your new clone' above it. The main content area shows 'Business Unit: EMORY' and 'Report ID: CPTST'. Below this are input fields for 'Report Title: Income Statement' and '*Layout: CONSOLIS_2'. On the right side, there is a list of actions: 'Copy to Another Business Unit / Clone', 'Delete This Report Request', 'Transfer to Report Books', 'Process Monitor', 'Report Manager', and 'Share This Report Request'. The 'Share This Report Request' link is circled in red. The status bar at the bottom indicates 'Internet | Protected Mode: Off' and '100%' zoom.

Creating a private report

Step 3: Open the clone The following page displays.

Define Report Request - Internet Explorer provided by Emory University

https://compass-reports.e. Bing

Define Report Request

Compass SHALL04 on FSRPT

Home | Worklist | Add to Favorites | Sign out

nVision Share Report Request

Business Unit: EMORY Report ID: CPTST

Last Update User ID: EM_FSBATCH Last Update Date/Time: 04/03/12 10:30:06AM

Access Mode

Public Secured

Click here

Report Request shared with: Customize | Find | View All | First 1 of 1 Last

ID Type	Distribution ID
1 User	

Done Internet | Protected Mode: Off 100%

Creating a private report

Step 4: Change the access mode

Define Report Request - Internet Explorer provided by Emory University

https://compass-reports.emory.edu/ps

Define Report Request

SHALL04 on FSRPT

Home Worklist Add to Favorites Sign out

New Window Help Customize Page

nVision Share Report Request

Business Unit: EMORY Report ID: CPTEST

Last Update User ID: EM_FSBATCH Last Update Date/Time: 04/03/12 10:30:06AM

Access Mode

Public Secured

Report Request shared with:

ID Type	*Distribution ID
1 User	SHALL04

OK Cancel

Done Internet | Protected Mode: Off 100%

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

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](#)

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](#)

Enter a new Run Control (report book) ID, and click *Add*

Creating an nVision Report Book

Add Parameters

Report Book

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

Run Parameters

As Of Date:

Tree Effective Date: Ignore Runtime Errors

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="button" value="magnifying glass"/>	<input type="text" value="CP44_062"/> <input type="button" value="magnifying glass"/>	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
2	<input type="text"/> <input type="button" value="magnifying glass"/>	<input type="text"/> <input type="button" value="magnifying glass"/>	<input type="button" value="View"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>

Click + to add the next line.

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

Creating an nVision Report Book

Save the Report Book

Report Book

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

Run Parameters

As Of Date:
Tree Effective Date: Ignore Runtime Errors

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

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

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

User ID: CPHELP2 Run Control ID: CPTEST

Server Name: Run Date: 06/07/2012

Recurrence: Run Time: 5:15:25PM

Time Zone:

Process List

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

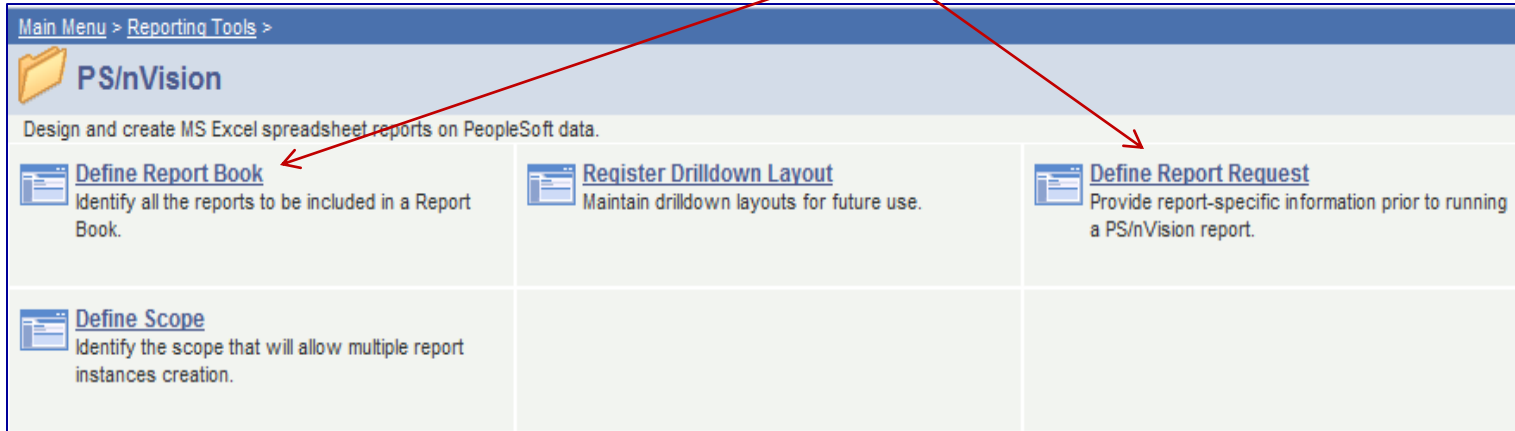
To change the type of output, click the drop-down menu under *Type* and change the type of output.

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

Recurring Report Requests

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

Select one



The screenshot shows the PS/nVision Reporting Tools interface. At the top, there is a breadcrumb trail: "Main Menu > Reporting Tools > PS/nVision". Below this, the "PS/nVision" section is highlighted, with a sub-header "Design and create MS Excel spreadsheet reports on PeopleSoft data." The main content area is divided into four tiles, each with a small icon and a title: "Define Report Book" (with a description: "Identify all the reports to be included in a Report Book."), "Register Drilldown Layout" (with a description: "Maintain drilldown layouts for future use."), "Define Report Request" (with a description: "Provide report-specific information prior to running a PS/nVision report."), and "Define Scope" (with a description: "Identify the scope that will allow multiple report instances creation."). Two red arrows originate from the text "Select one" above the screenshot. One arrow points to the "Define Report Book" tile, and the other points to the "Define Report Request" tile.

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

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:

Process List

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

Process Scheduler Request

User ID: CPHELP2

Server Name:

Recurrence:

Process List **Server List**

View Process Request For

User ID: CPHELP2 Type: Last: 1 Days

Server: Name: Instance: to

Run Distribution Save On Refresh

Process List [Customize](#) | [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"/>	1986003		nVision Report	NVSRUN	CPHELP2	06/11/2012 9:00:00PM EDT	Queued	N/A	Details

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