

## Running nVision Reports

**Navigation:** *Reporting Tools> PS/nVision> Define Report Request*

### 1. Click **Search**.

#### 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

Report ID: begins with

Description: begins with

☐ Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

#### Search Results

View All First 1-39 of 39 Last

Business Unit	Report ID	Description
CASE1	BUD_FCST	Budget Forecast
CASE1	CASE_FCT	Case - All Depts Forecast
CASE1	CW_END01	Unpooled Endowment Assets
CASE1	CW_END02	Endowment Pmi Units Updates

2. Click on the **Report** you need to run. After doing so, you will be taken to the **nVision Report Request** tab.

3. Once on the **nVision Report Request** tab:

a. Under **Report Date Selection** change the date to the last day of the month you want to run the report for.

**Report Date Selection**

\*As Of Reporting Date:

\*Tree As Of Date:

b. Under **Output Options** change the **Type** to **Web** and **Format** to **Microsoft Excel Files (\*.xls)**.

**Output Options**

\*Type:  [Enter Delivery Template Options](#)

\*Format:

4. Click **Run Report**.

[Run Report](#)

5. Once on the **Process Scheduler Request** page, change the **Server Name** field to **PSNT**, the **Type** to **Web** and the **Format** to **XLS**.

**Process Scheduler Request**

User ID:  Run Control ID:

Server Name:  Run Date:

Recurrences:  Run Time:

Time Zone:

Select	Description	Process Name	Process Type	Type	Format
<input checked="" type="checkbox"/>	nVision Report	NVSRUN	nVision Report	Web	XLS

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

6. Click **OK**.

7. Once you are back on the **nVision Report Request** tab, click **Process Monitor**.

**nVision Report Request** [Advanced Options](#)

Business Unit: CASE1 Report ID: BUD\_FCST [Copy to Another Business Unit / Clone](#)

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

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

[Process Monitor](#) [Report Manager](#)

8. Once on the **Process List** tab, click Refresh until the **Run Status** header reads **Success**.

**Process List** [Server List](#)

**View Process Request For**

User ID:  Type:  Last:  Days

Server:  Name:  Instance:  to

Run Status:  ☒ Save On Refresh

Instance Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Details
341196	nVision-Report	NVSRUN	djp28	08/26/2005 4:26:53PM EDT	Success	<a href="#">Details</a>

9. Click **Details**.

10. Click **New Window** to get your report.

11. From the navigation on the left, click **Reporting Tools> Report Manager**.

12. Click the **Administration Tab**.

13. Click **View**.

**Explorer** **List** **Administration** **Archives**

**View Reports For**

User ID:  Type:  Last:  Days

Status:  Folder:  Instance:  to:

Select	Report ID	Prce Instance	Report Description	Request Date/Time	Format	Status	Details	View
<input type="checkbox"/>	113394	341196	Endowment Proj Units Updates	08/26/2005 4:27:22PM	Microsoft Excel Files (*.xls)	Posted	<a href="#">Details</a>	<a href="#">View</a>

14. Click the **.pdf** link under the **Name** header. Your report will launch in a new window.