

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 1-30 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
CASF1	CW_FND02	Endowment Proj 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: Specify

'Tree As Of Date: Use As Of Reporting Date

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

Output Options

'Type: Web [Enter Delivery Template Options](#)

'Format: Microsoft Excel Files (*.xls)

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: djp28 Run Control ID:

Server Name: PSNT Run Date: 08/26/2005

Recurrence: Run Time: 4:12:55PM [Reset to Current Date/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: Budget Forecast [Delete This Report Request](#)

Layout: BUDGET FORECAST-APR [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: djp28 Type: Last: 1 Days Refresh

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	Details

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: djp28 Type: Last: 1 Days Refresh

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	Details	View

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