PeopleSoft Training

BRF (University Health Hospitals) Web_nVision_Reports_9_1

Version Date: January 2014

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BRF (University Health Hospitals) Process Basic Reports - Web Method

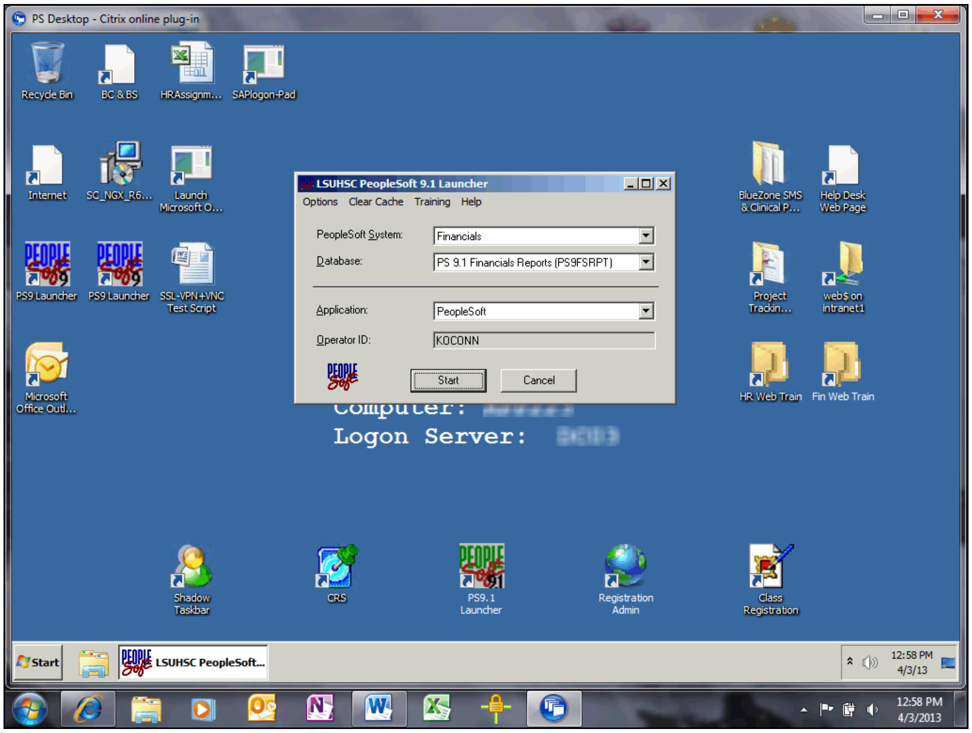
Procedure

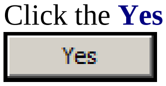
In this topic you will learn how to **Process Basic Reports - Web Method**.

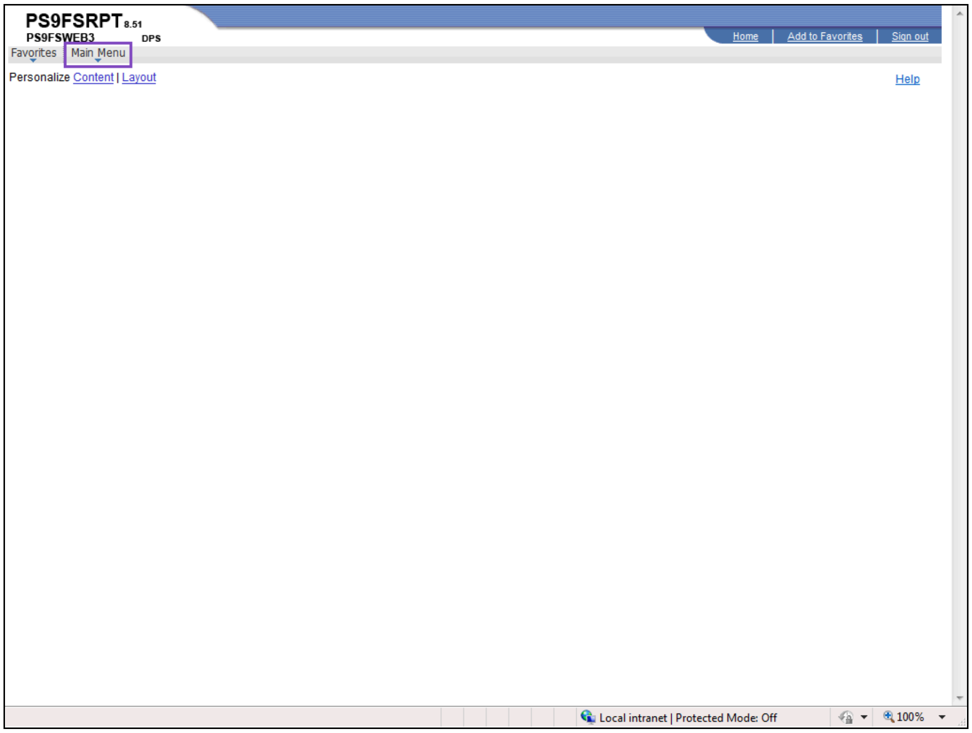
NOTE: Web nVision is only available in the RPT database.

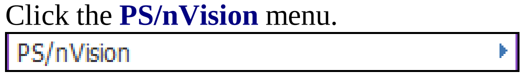
If you experience issues with nVision Reports, contact the PeopleSoft Financials Functional Support Team for assistance by opening a Help Desk Ticket.

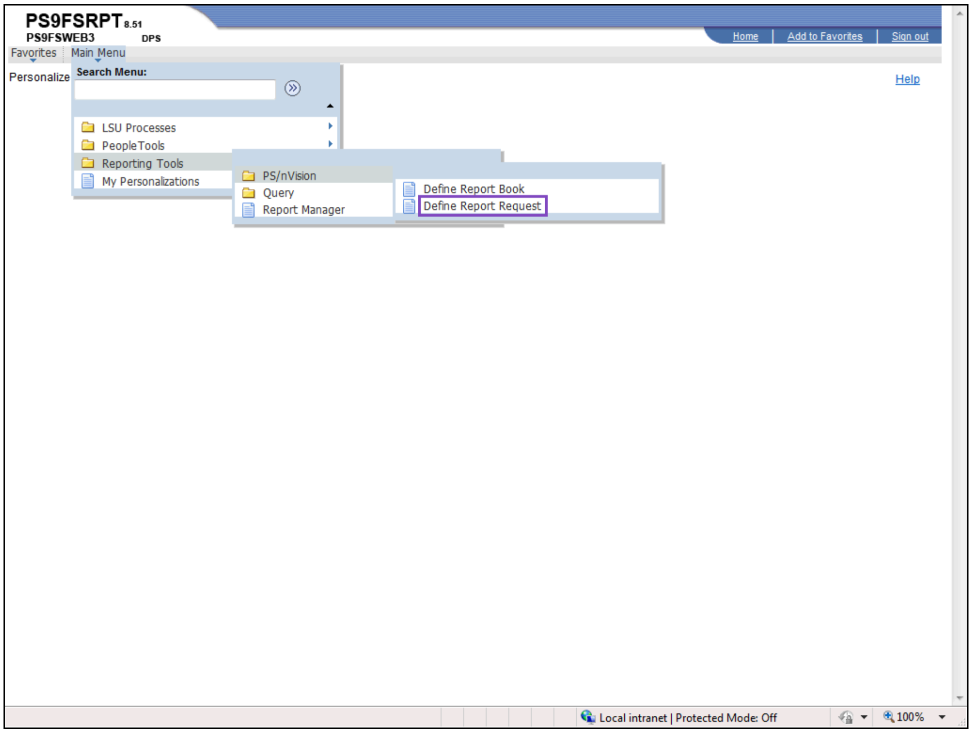
Step	Action
1.	From the PeopleSoft 9.1 Launcher, select the following: **PeopleSoft System: Financials** **Database: PS9 Financials Report (PS9FSRPT)** **Application: PeopleSoft**



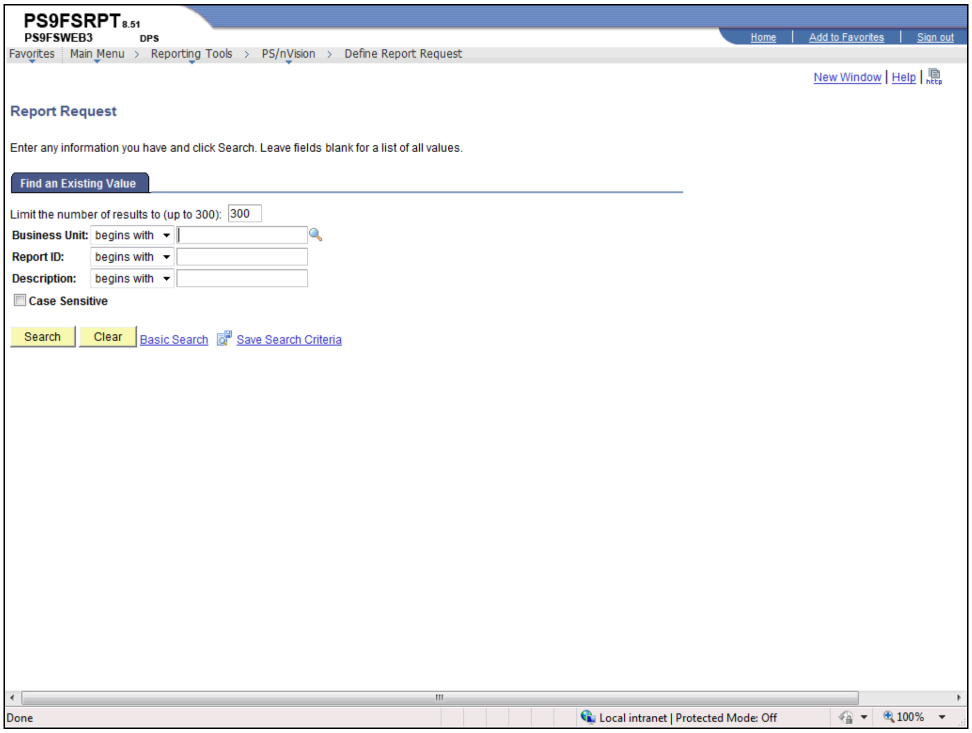
Step	Action
2.	Click the **Start** button. 
3.	A warning message displays to remind you that this is **not** the Production database. Click the **Yes** button. 

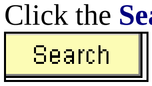


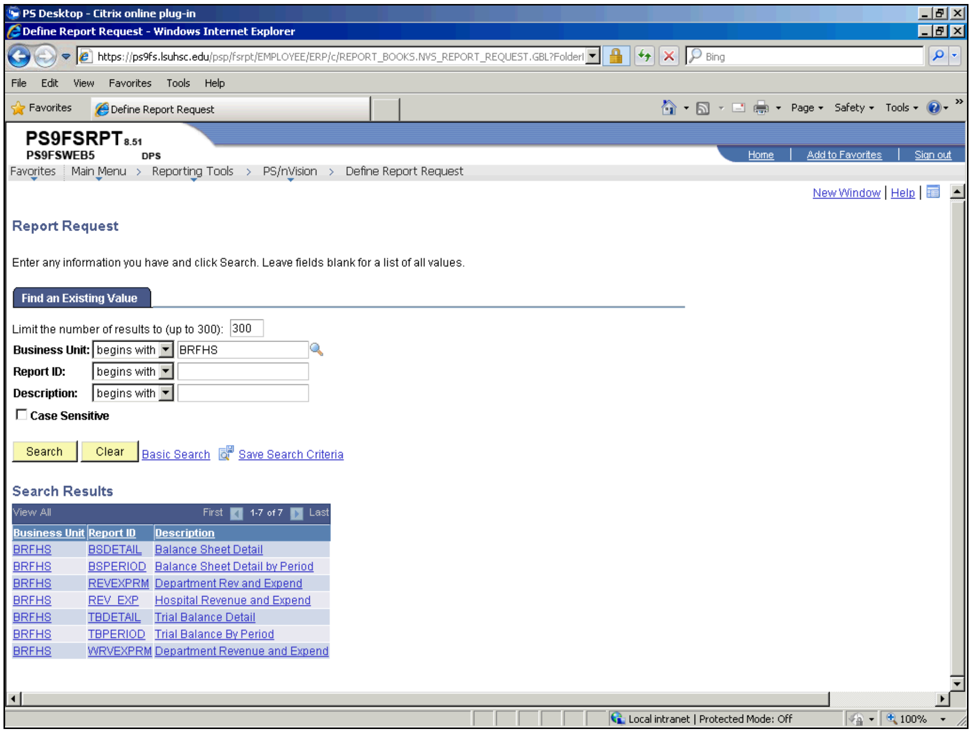
Step	Action
4.	Click the **Main Menu** button. 
5.	Click the **Reporting Tools** menu. 
6.	Click the **PS/nVision** menu. 



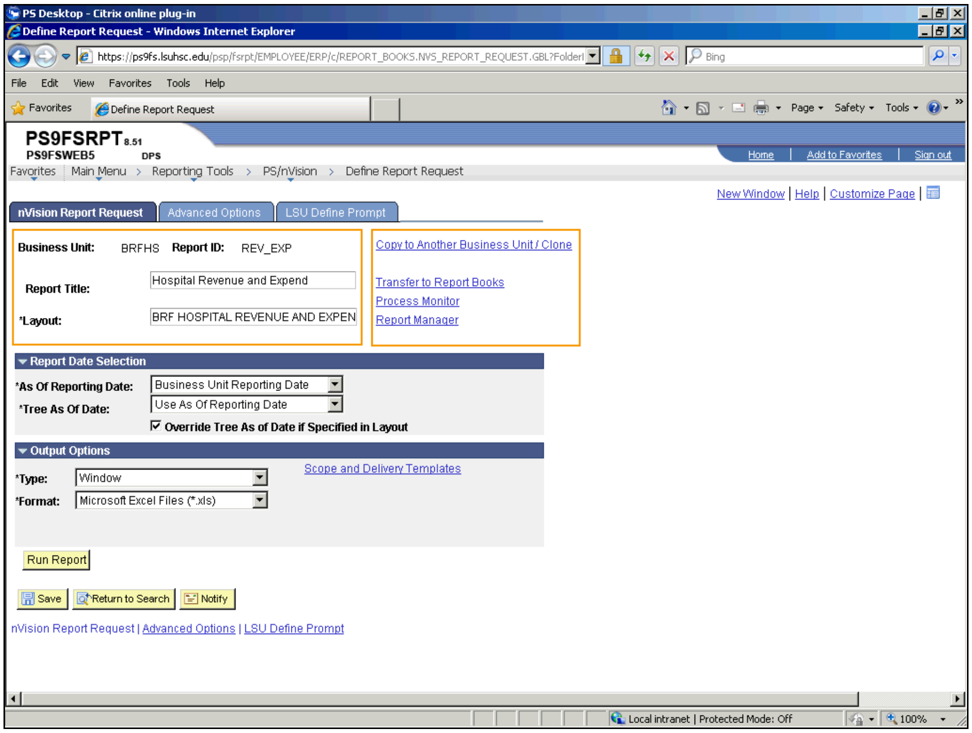
Step	Action
7.	Click the **Define Report Request** menu. Define Report Request



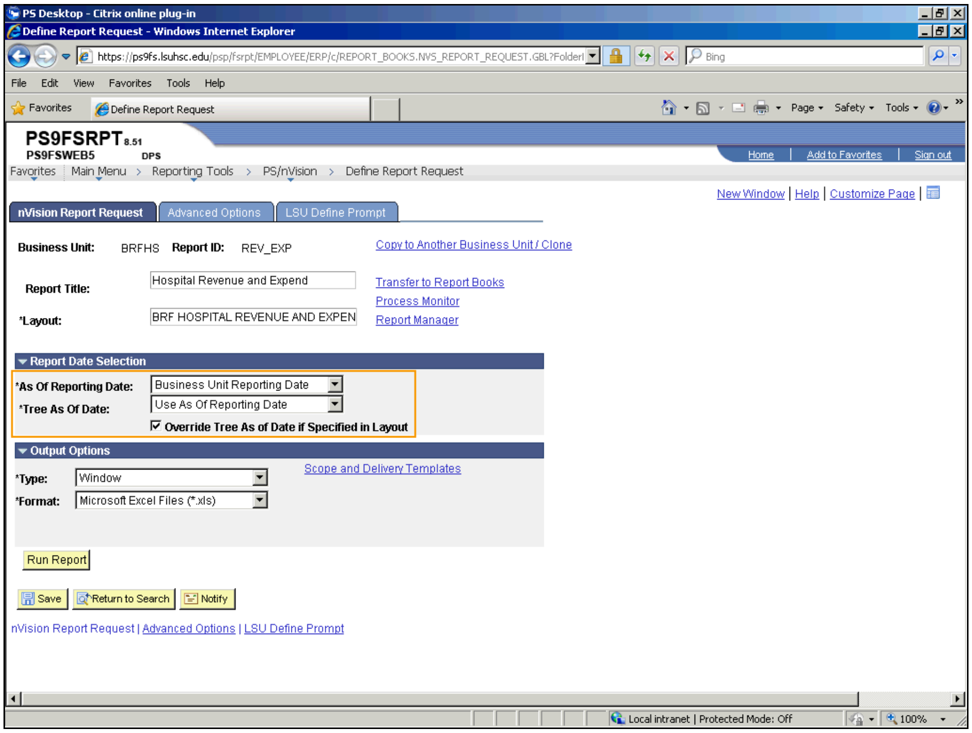
Step	Action
8.	Enter the desired information into the **Business Unit** field. Enter "**BRFHS or BRFHM**".
9.	Click the **Search** button. 



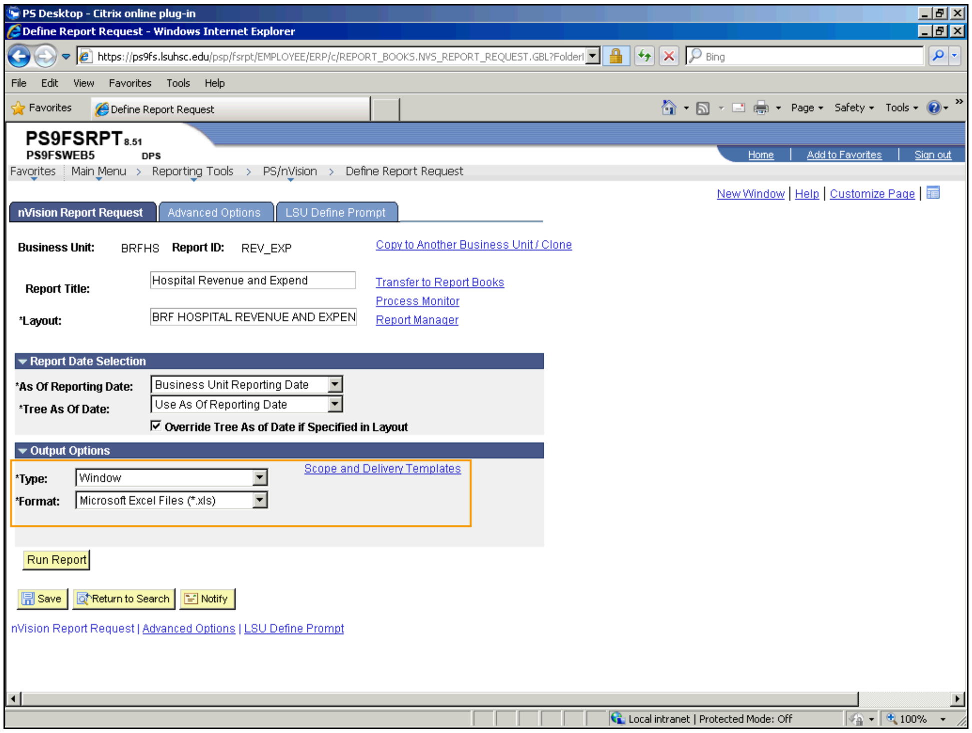
Step	Action
10.	A list of the available reports for that Business unit will display. Now, select the report you want for this particular business unit. In this example, we will run the Hospital Revenue and Expend Report. Click the **REV_EXP** link. REV_EXP
11.	This page is divided into three main sections: **1.** The Report Request Section; **2.** The Report Date Section; and **3.** The Output Options Section.



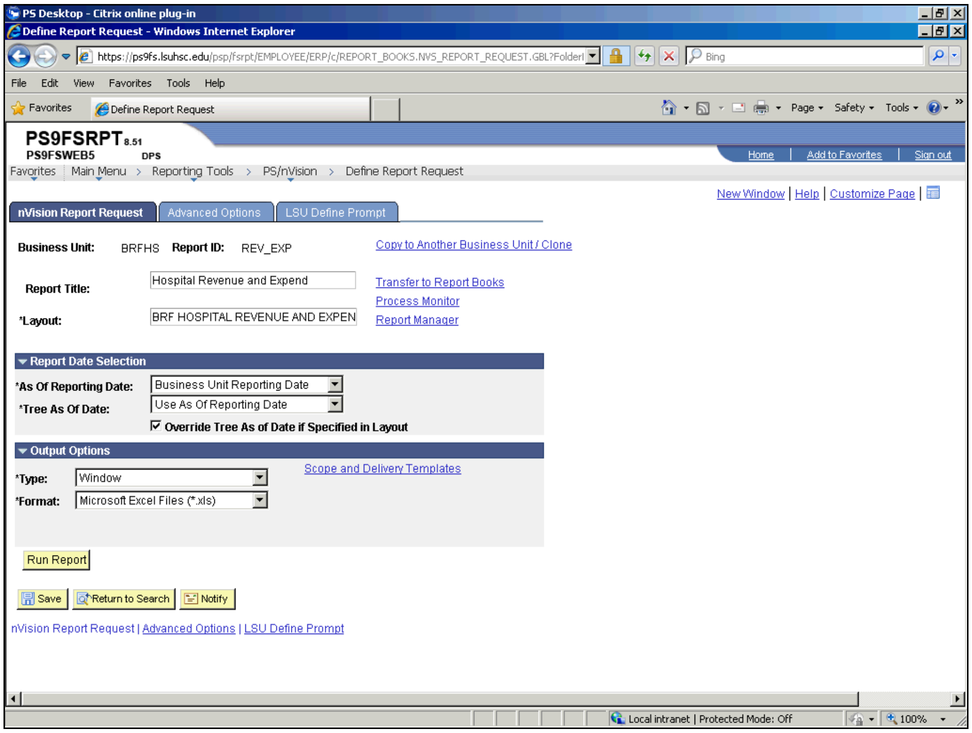
Step	Action
12.	**The Report Request Section** The top section includes the Business Unit and Report Request Name, Descriptive Report Title, and the Layout name that is utilized by the Report Request. To the right are links that allow users to copy the report request (based on user's security), Transfer (navigate) to Report Books, navigate to the Process Monitor and navigate to the Report Manager. An additional link allows users to Share private report requests with other users (security based).



Step	Action
13.	**The Report Date Section** Includes the “As of Reporting Date” and the “Tree As of Date”. Typically, the “As of Reporting Date” is either the “Business Unit Reporting Date” or the selection of “Specify” which allows the user to enter a specific date for the report. The “Tree as of Date” will typically be set to “Use As of Reporting Date”. A check box displays below the Tree As of Date line that reads, "Override Tree As of Date if Specified in Layout". This box will **<u>always</u>** remain checked.

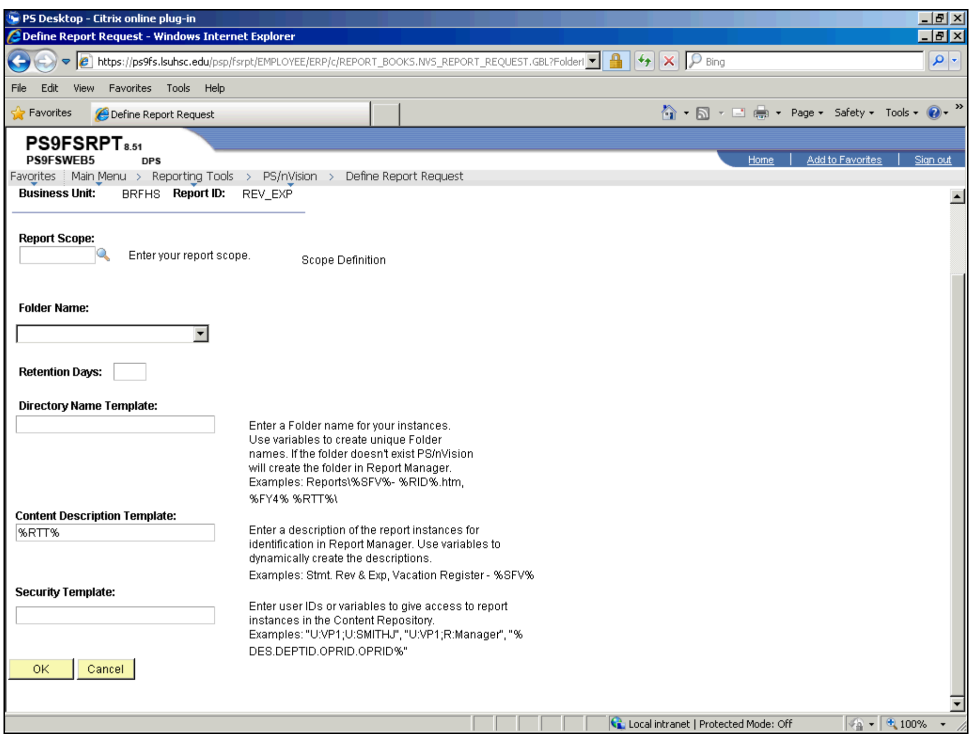


Step	Action
14.	**The Output Options Section** **<u>Output Type:</u>** Allows the user to choose the output type of Web, Window, File, Email, or Printer. For this example, the output type of Web is used. The output type of Window (most commonly used) will be demonstrated in the next exercise and in the example for the Drill feature. An example of sending a report via email will follow the Drill example. **<u>The Output format will always be Microsoft Excel, .xls:</u>** The other option, HTML, will produce reports; however, the formatting is incorrect.

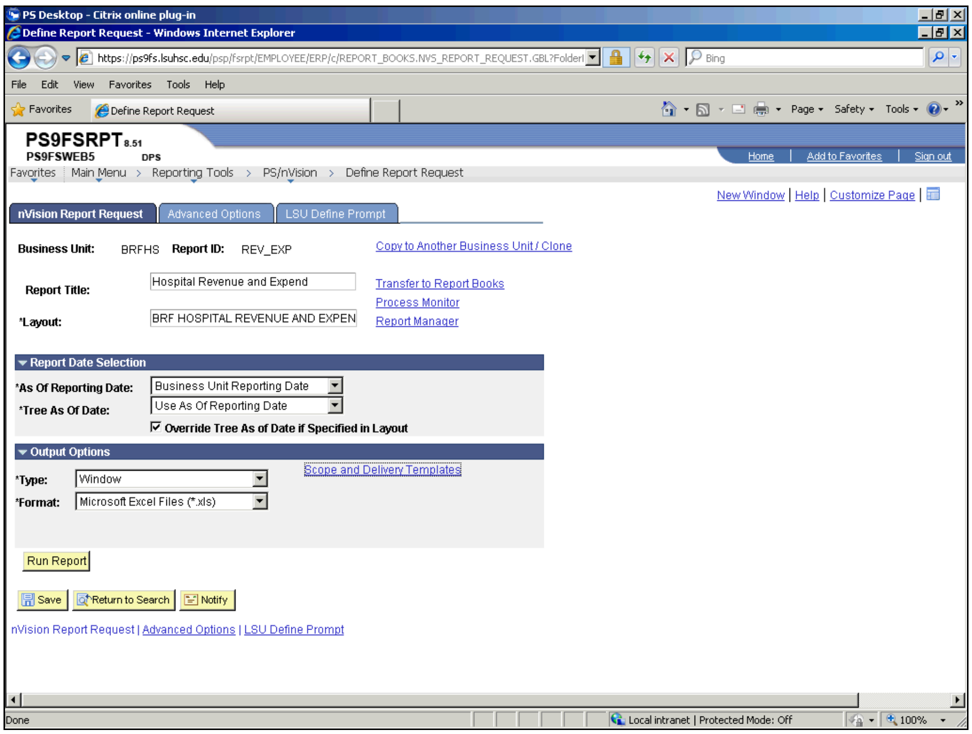


Step	Action
15.	Click the **Scope and Delivery Templates** link in the Output Options section. Scope and Delivery Templates
16.	The options displayed on this link's subpage are determined by the Output Type selected on the Report Request tab. The examples in this screenshot are based on the output type of Web. • The **Report Scope** Box will contain the Scope name if one is used with the Report. Scopes are used to create multiple report instances based on a set of parameters. **There are no reports that use Scope for the University Health Hospitals.** • The **Folder Name** will not be used for web based report distribution within the repository. This option only displays if the Output Option Type is Web. • The **Directory Name Template** box will be used to identify the file location if the File output type is selected. **The Output Type of File is not a valid option for the University Health Hospitals.**

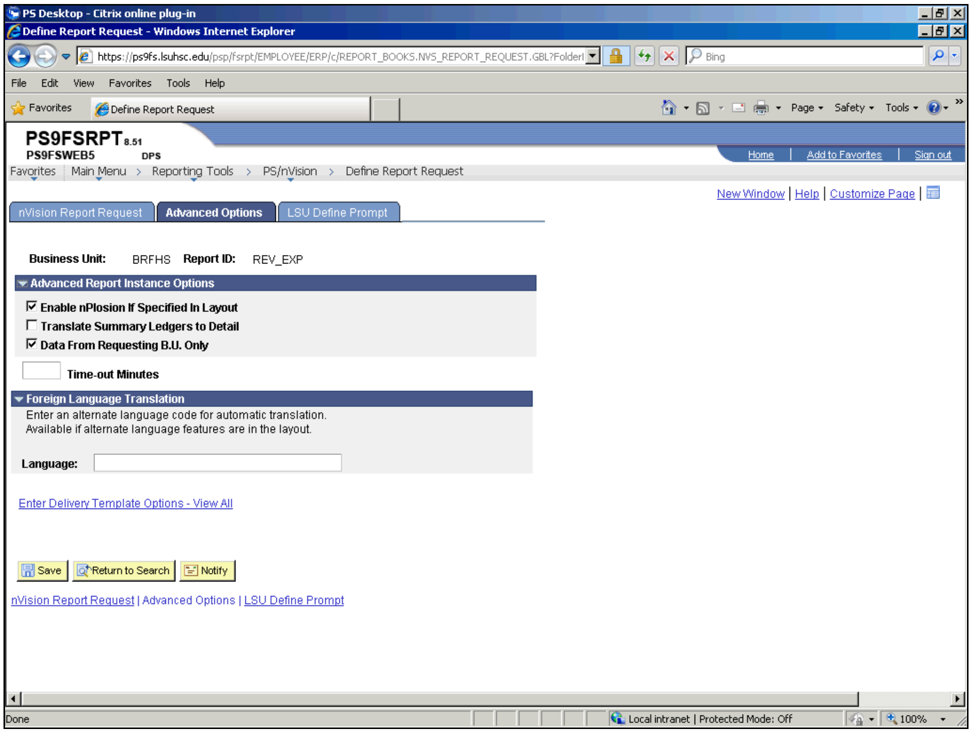
Step	Action
17.	• The **File Template** is used to identify the file name that will appear in the Report Repository. This option will display when the Output Options Type is File, Email, or Printer. • The **Content Description Template** is also used to identify the file name that will appear in the Report Repository. This option will display when the Output Options Type is Web or Window. ***NOTE: The variables currently exist in the Windows version of nVision and will be carried over to the Web product.*** The values displayed in the screen shot use Report Variables. The %RBU%-%RTT% (Requesting Business Unit - Report Title), the %RID% (Report ID) and the %SFD%-%RTT% (Scope Field Description - Report Title) are the most common examples. • The **Security Template** will not be used for Web based Report Distribution within the repository.



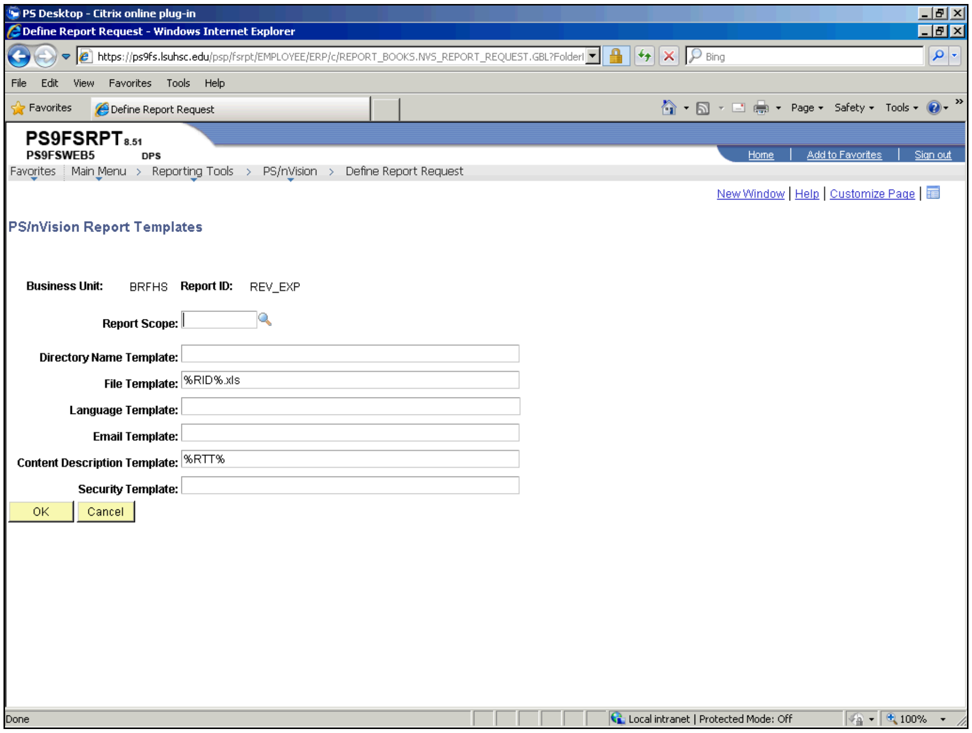
Step	Action
18.	Most often, users will not make any changes to this subpage. Click the **OK** button. 

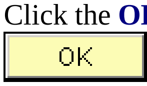


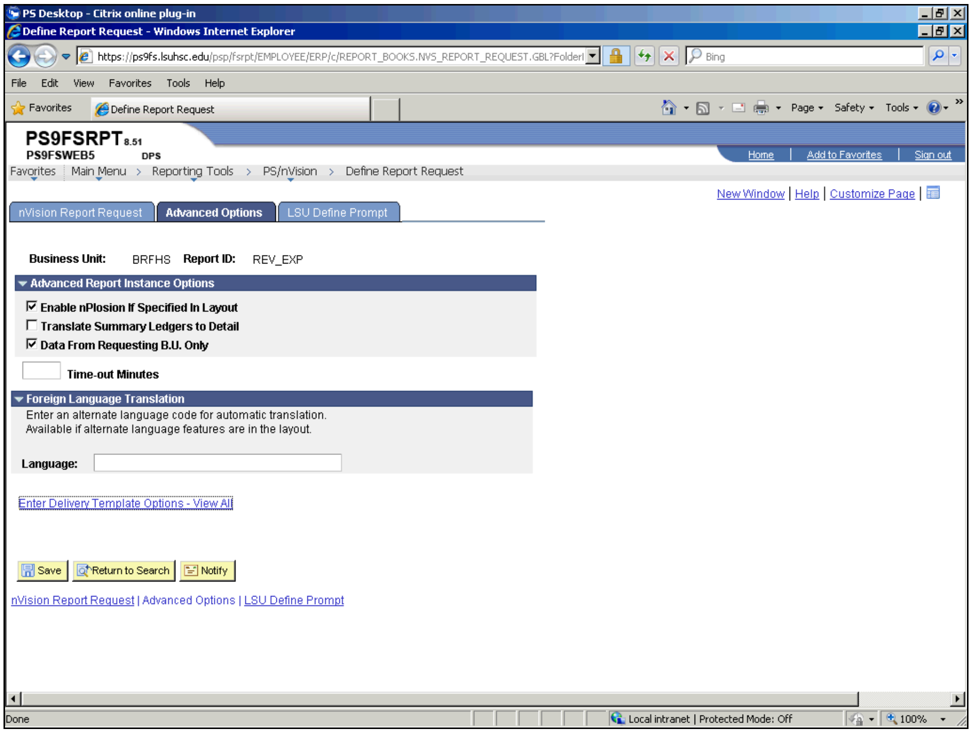
Step	Action
19.	Click the **Advanced Options** tab. 

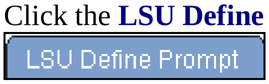


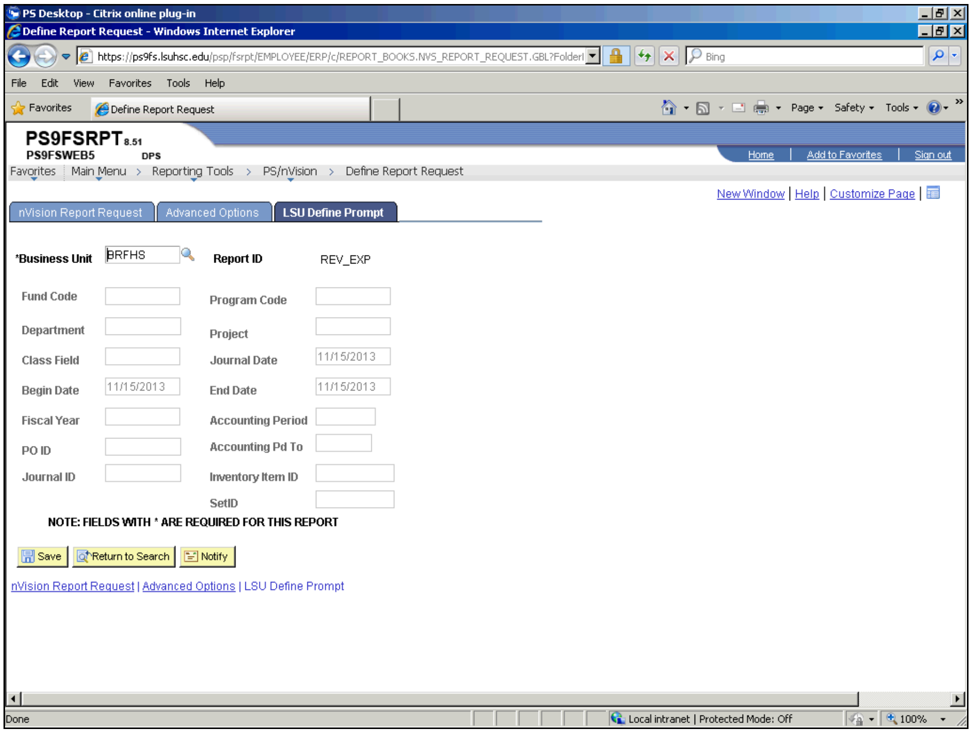
Step	Action
20.	Generally, you should not need to change any of the settings on this page. Click the **Enter Delivery Template Options - View All** link. Enter Delivery Template Options - View All



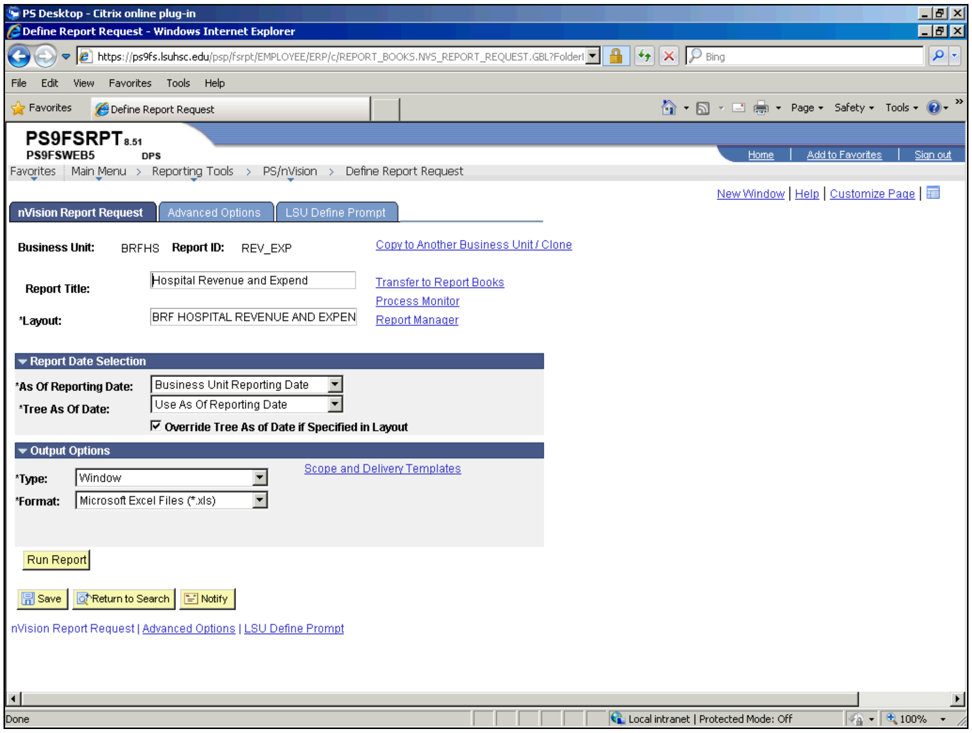
Step	Action
21.	This page includes all of the entry boxes from the link on the Report Request page, plus a File template and an Email template. The File template box is used to name the .xls field. ***NOTE: This feature is not currently used for the University Health Hospitals.*** The Email box would be used only if the report output type is set to Email. Click the **OK** button. 



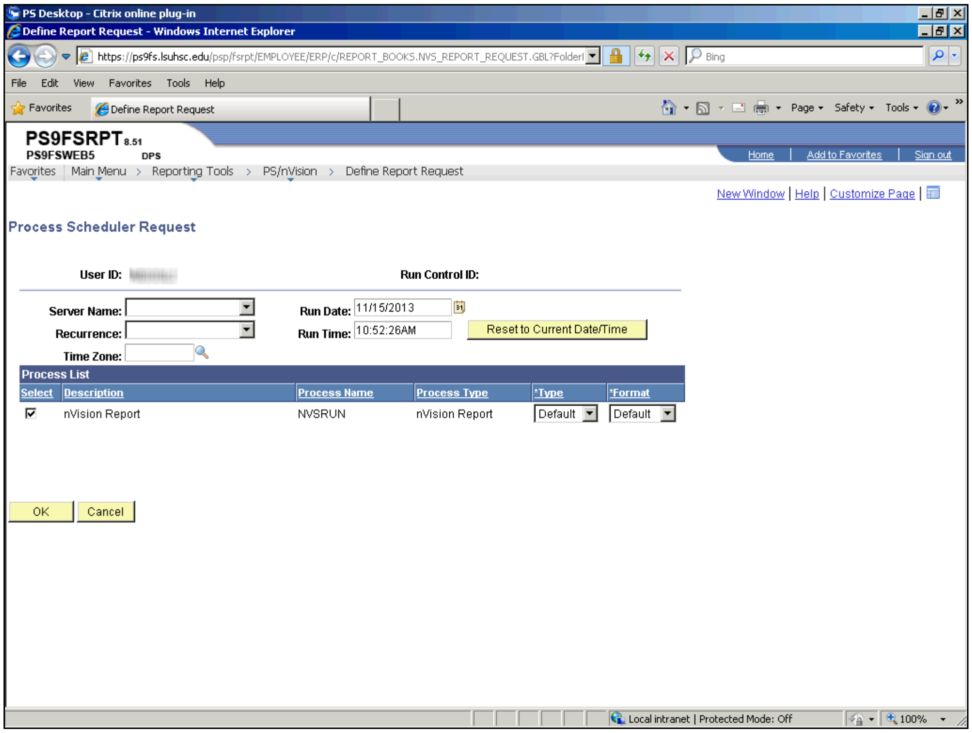
Step	Action
22.	Click the **LSU Define Prompt** tab. 

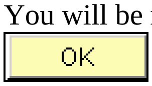


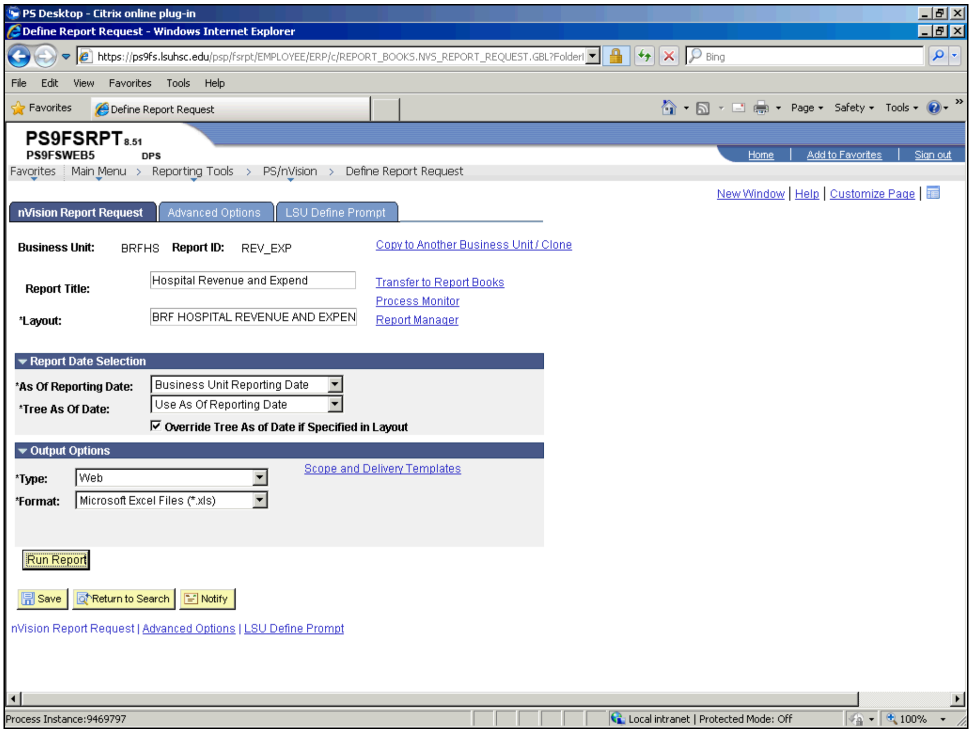
Step	Action
23.	This page allows the user to enter the prompt values for the reports that use run-time prompts. Fields that are bold are required prompt values for the report. In this example, the report is a basic one; not using any prompts. Thus, there are no required fields for entry. Click the **nVision Report Request** tab. 



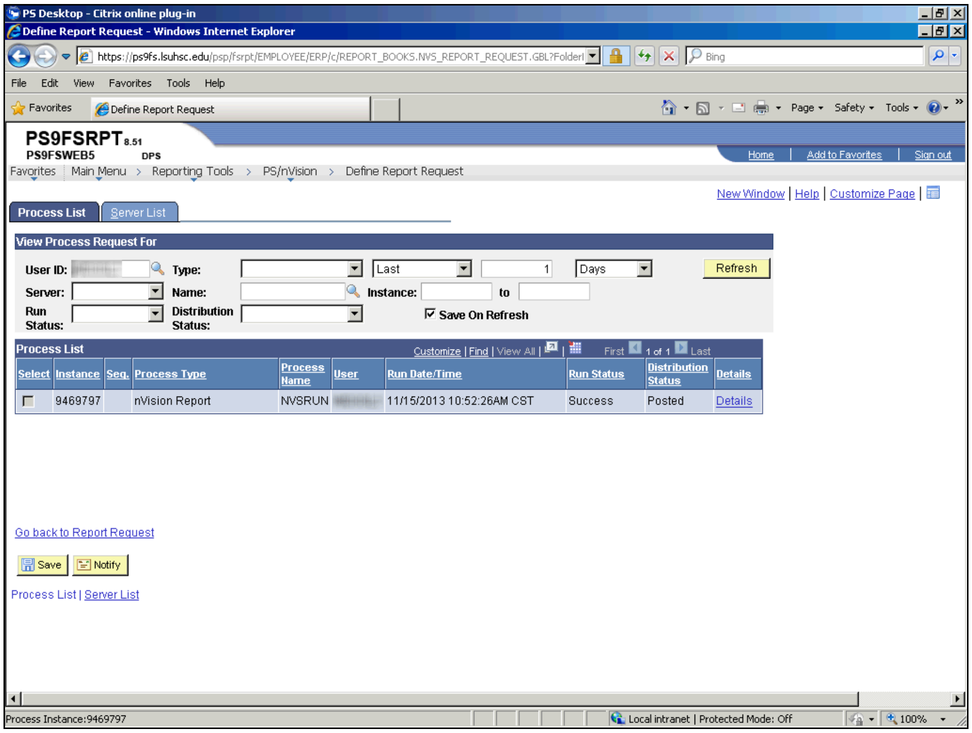
Step	Action
24.	Click the button to the right of the **Type** field. 
25.	Click the **Web** list item. Web
26.	***NOTE: Every report must be saved before running the report.*** Click the **Save** button. Save
27.	Click the **Run Report** button. Run Report



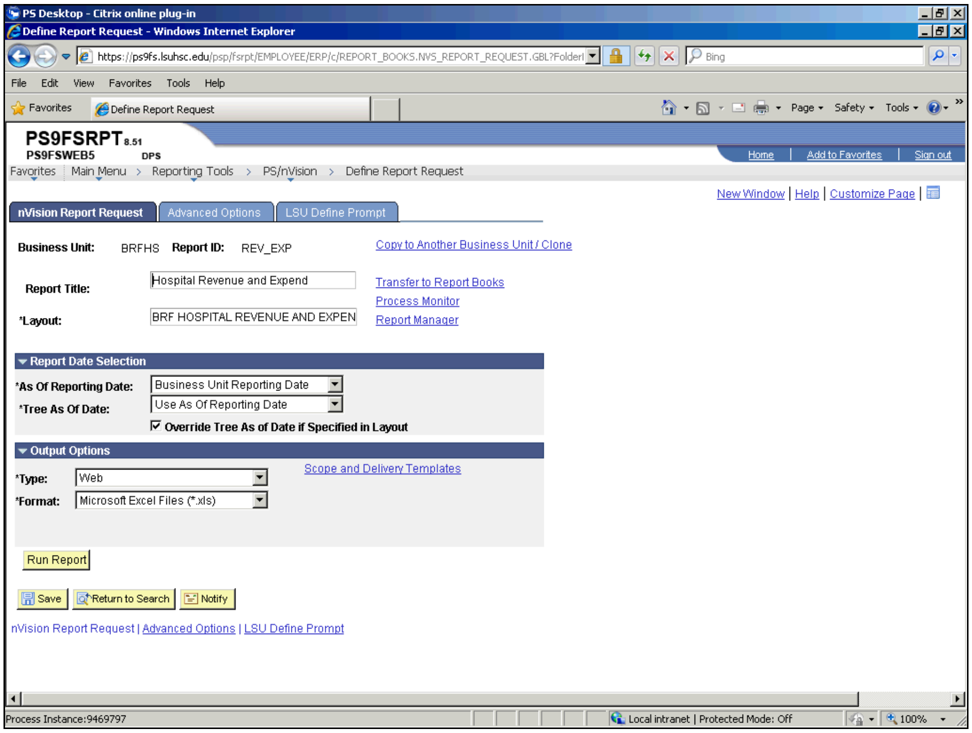
Step	Action
28.	On the Process Scheduler page, click the button to the right of the **Server Name** field. 
29.	Click the **PSNT** list item. 
30.	Click the **OK** button. You will be returned to the Report Request page. 



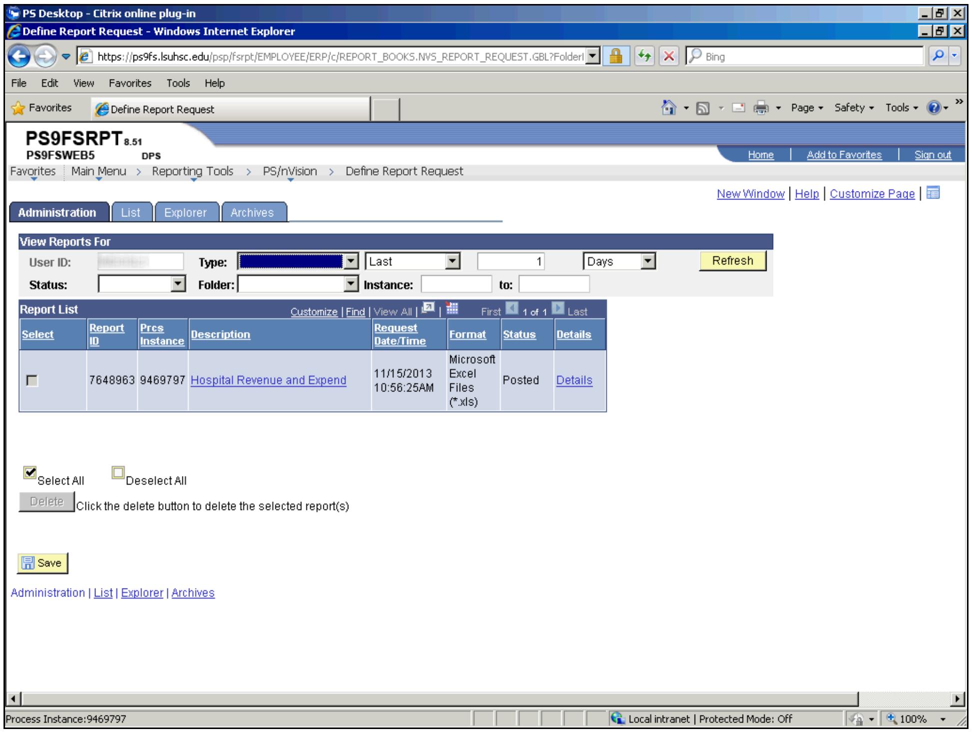
Step	Action
31.	Click the **Process Monitor** link. Process Monitor



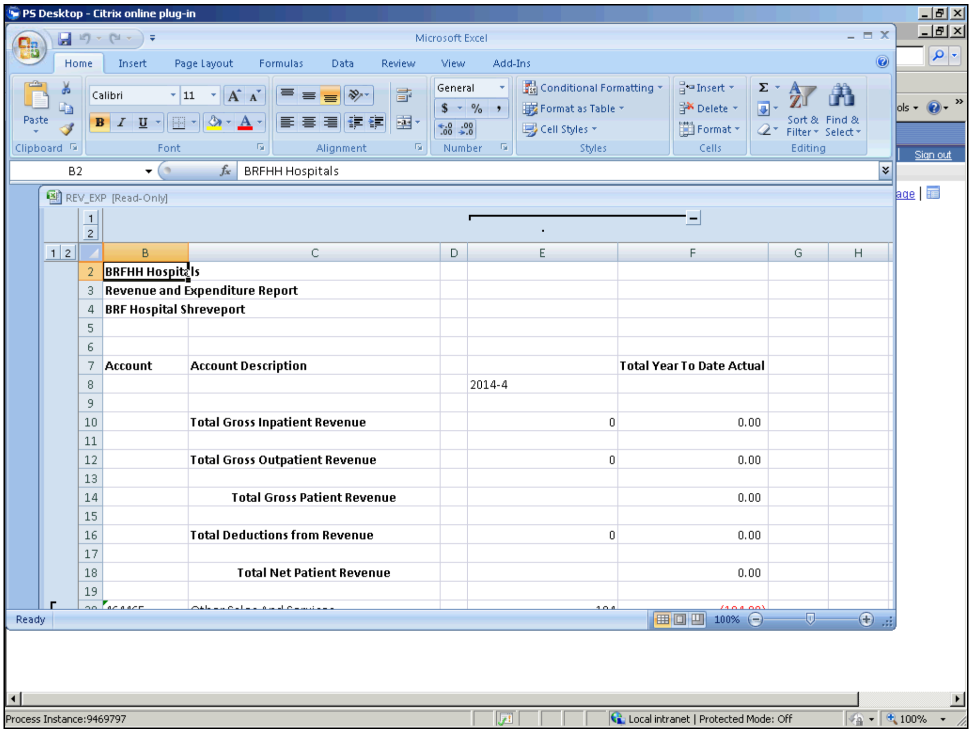
Step	Action
32.	Click the **Refresh** button until **Run Status = Success** and **Distribution Status = Posted**. ***REMINDER: Wait at least 15 seconds between each time you click the Refresh button.*** Refresh
33.	Click the **Go back to Report Request** link. Go back to Report Request

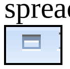


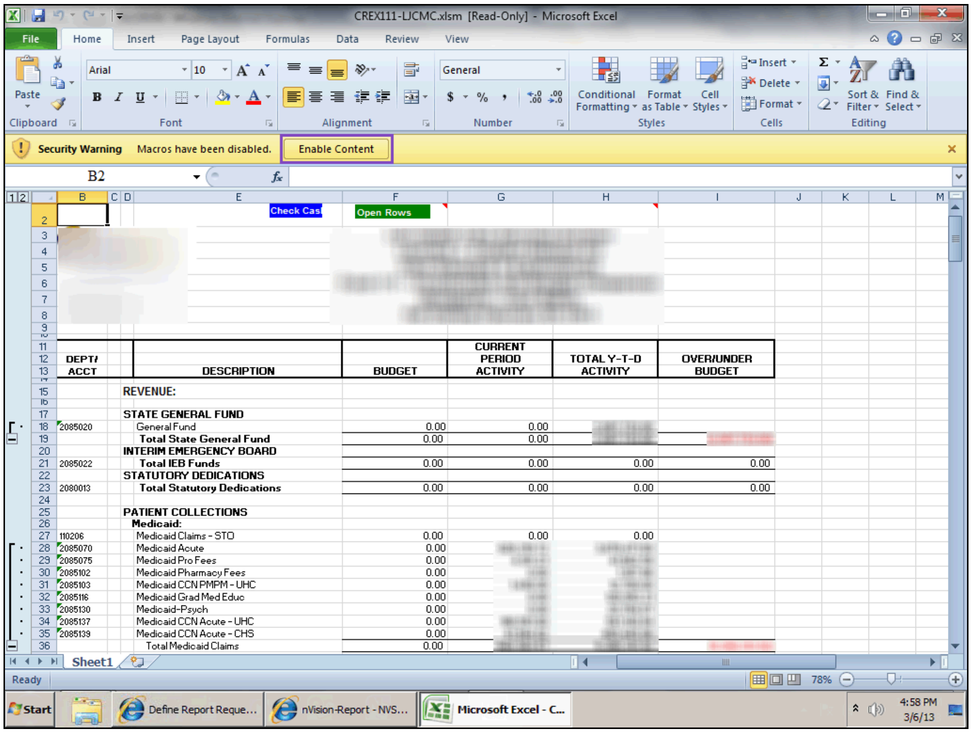
Step	Action
34.	Click the **Report Manager** link. Report Manager

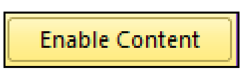
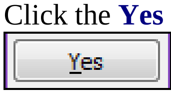
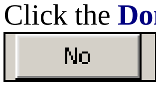


Step	Action
35.	The Administration tab should be the active tab. A list of reports for your userid displays. The uppermost report in the list is the most recent one. To open a report, click the report name link in the Description column of the page. ***NOTE: The information displaying in the Description column is the result of the specification in the Content Description Template box on the Report Request page.*** Click the **Hospital Revenue and Expend** link. Hospital Revenue and Expend



Step	Action
36.	A new window opens and the report displays in an Excel window. Click the **Maximize** button in the upper right corner of the report to expand the spreadsheet to fill the window. 



Step	Action
37.	Some reports include Macros and you may receive a Security Warning pop-up. Click the **Enable Content** button. ***NOTE: The window may be minimized on the desktop.*** 
38.	A Security Warning message will display. Click the **Yes** button. 
39.	Click the **Close** button. 
40.	Click the **Don't Save** button. 
41.	This completes ***Process Basic Reports - Web Method***. **End of Procedure.**

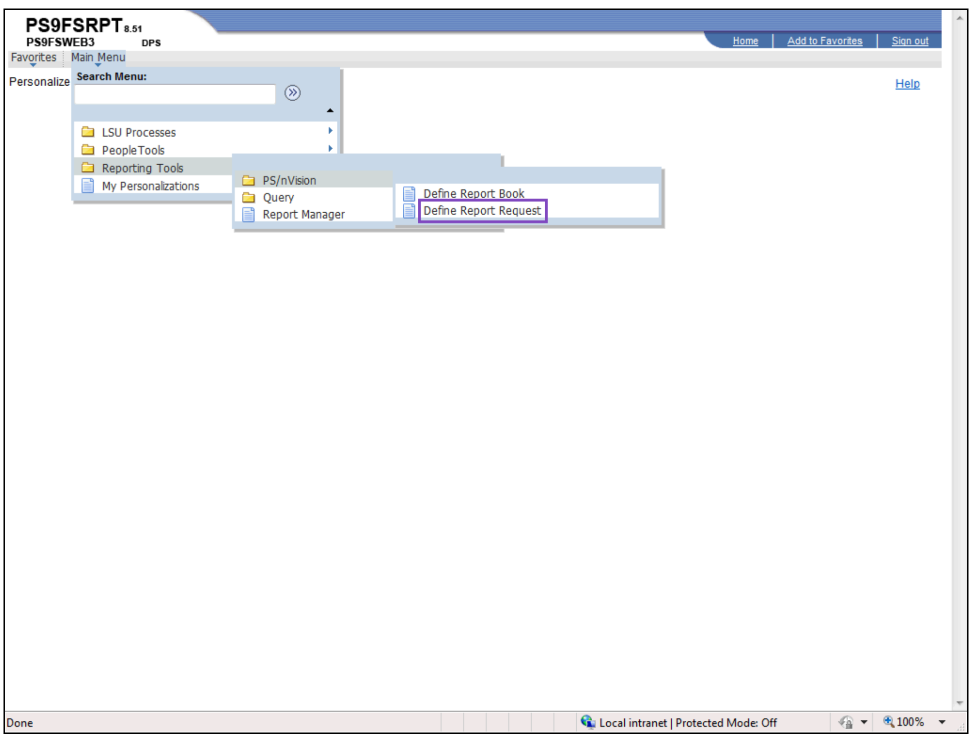
BRF (University Health Hospitals) Process Basic Reports - Window Method

Procedure

In this topic you will learn how to **Process Basic Reports - Window Method**.

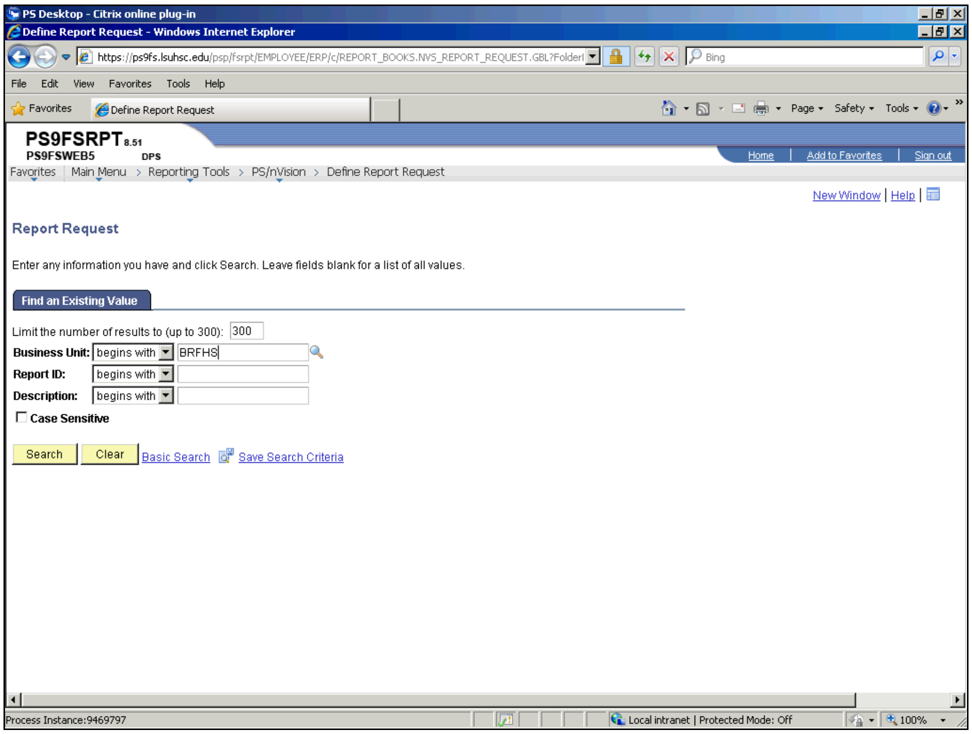
NOTE: The Window method is the most commonly used output for nVision reports.

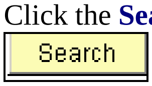
Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Reporting Tools** menu. Reporting Tools
3.	Click the **PS/nVision** menu. PS/nVision

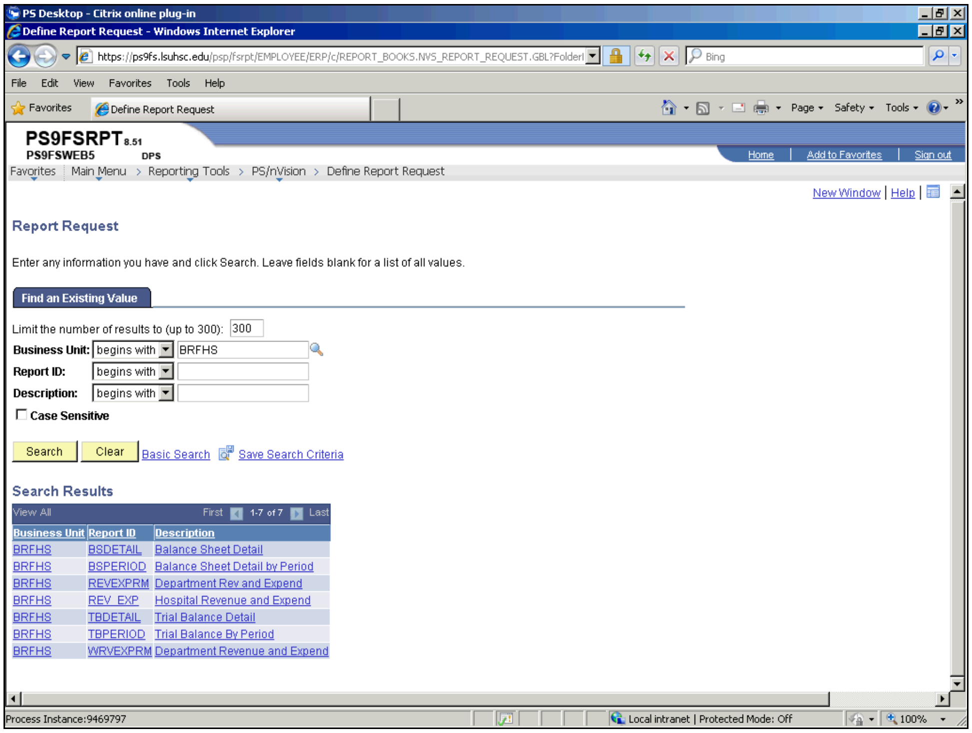


Step	Action
4.	Click the **Define Report Request** menu. Define Report Request

Step	Action
5.	Enter the desired information into the **Business Unit** field. Enter "**BRFHS or BRFHM**".

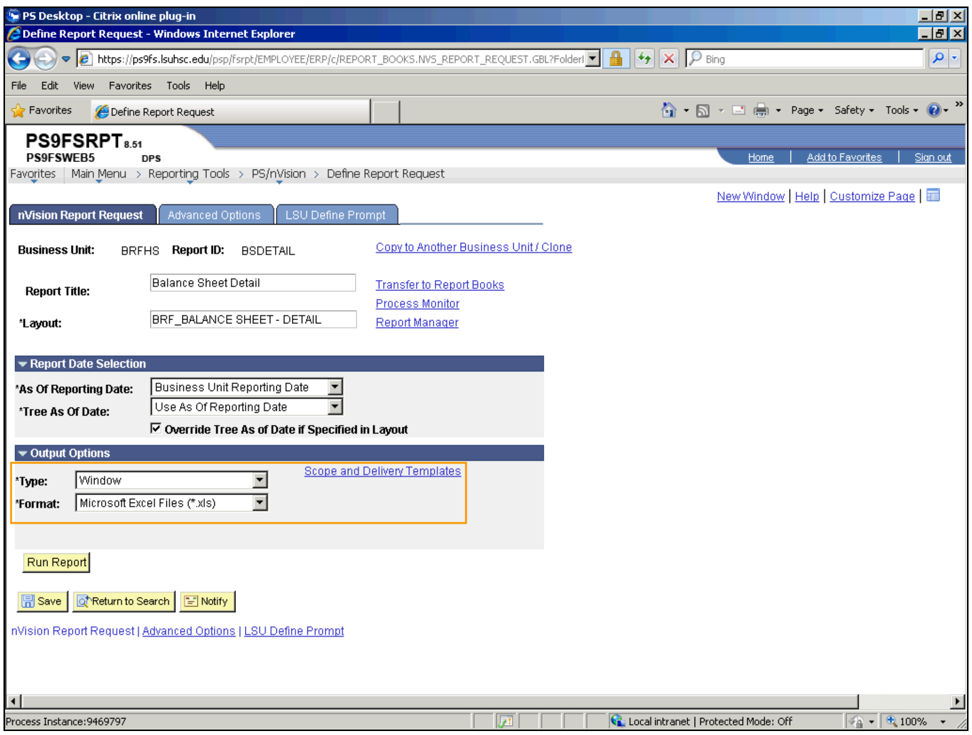


Step	Action
6.	Click the **Search** button. 

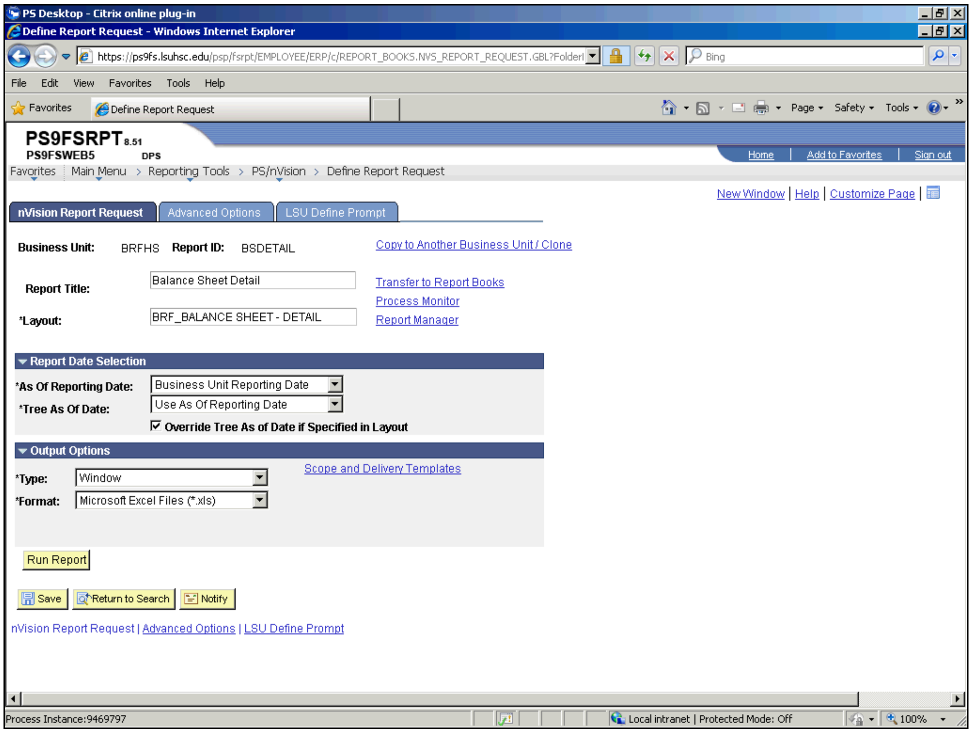


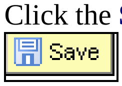
Step	Action
7.	A list of available reports for that Business Unit is displayed. Now, select the report you want for this particular Business Unit. In this example, you will run the Balance Sheet Detail Report. Click the **BSDETAIL** link. BSDETAIL
8.	This page is divided into three main sections: 1. The Report Request Section; 2. The Report Data Section; and 3. The Output Options Section.
9.	**The Report Request Section** The top section includes the Business Unit and Report Request Name, the Descriptive Report Title, and the Layout name that is utilized by the Report Request. To the right are links that allow users to copy the report request (based on user's security), Transfer (navigate) to Report Books, navigate to the Process Monitor, and navigate to the Report Manager. An additional link allows users to Share private report requests with other users (security based).

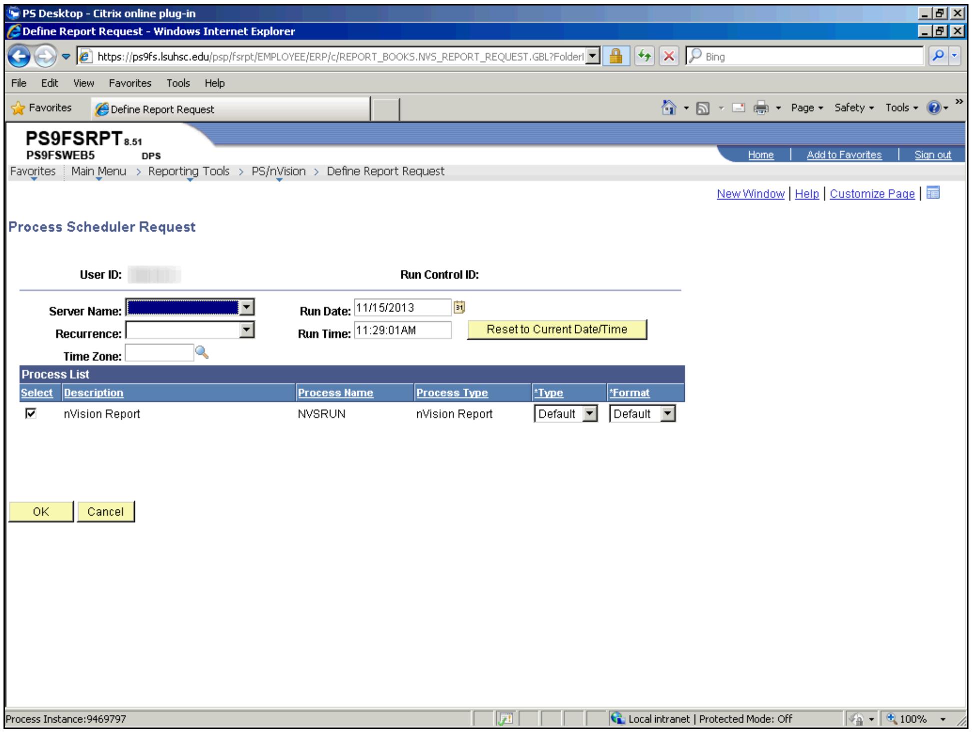
Step	Action
10.	**The Report Date Section** Includes the "As of Reporting Date" and the "Tree As of Date". Typically, the "As of Reporting Date" is either the "Business Unit Reporting Date" or the selection of "Specify" which allows the user to enter a specific date for the report. The "Tree As of Date" will typically be set to "Use As of Reporting Date". A checkbox displays below the "Tree As of Date" line that reads: "Override Tree As of Date if Specified in Layout".



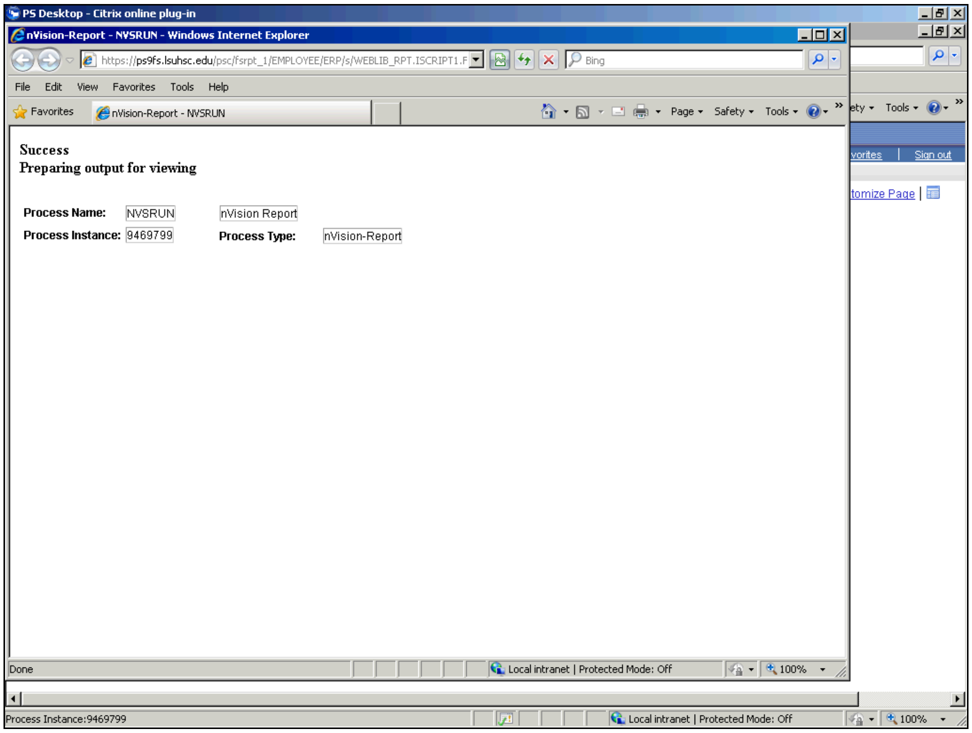
Step	Action
11.	**The Output Options Section** **Output Type:** Allows the user to choose the output type of Web, Window, File, Email, and Printer. For this example, the type of Window will be selected. **The Output format should ALWAYS be Microsoft Excel, .xls.** The other option, HTML, will produce reports however, the formatting is incorrect.



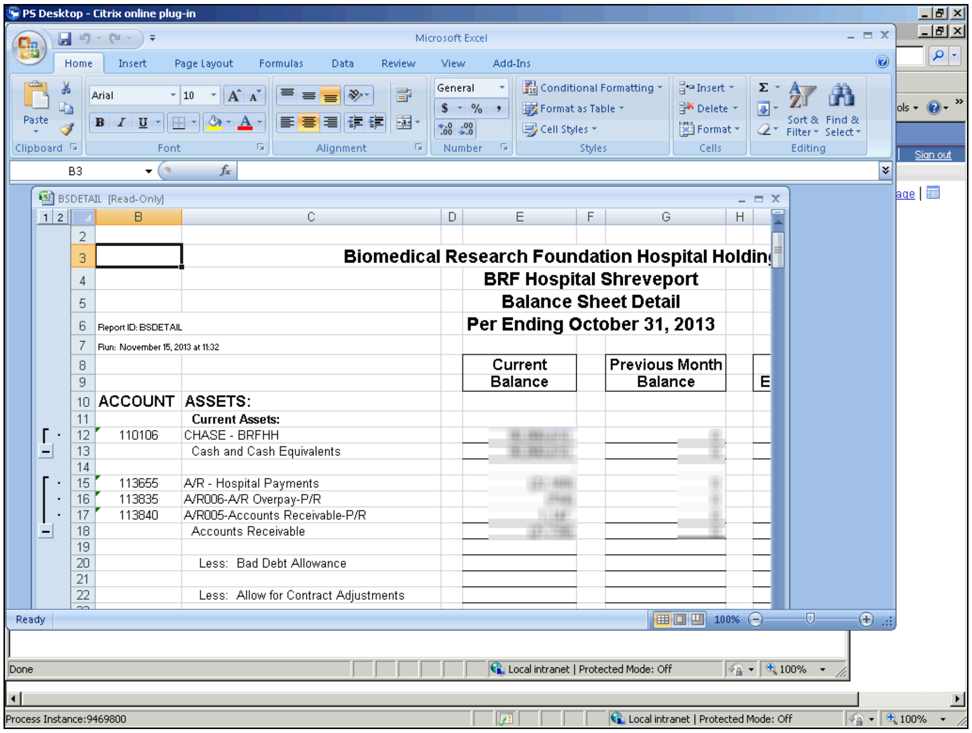
Step	Action
12.	Click the button to the right of the **Type** field. 
13.	Click the **Window** list item. 
14.	No other changes are needed on the page with the Output Options Type set to Window. Click the **Save** button. 
15.	Click the **Run Report** button. 

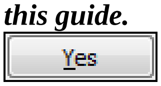


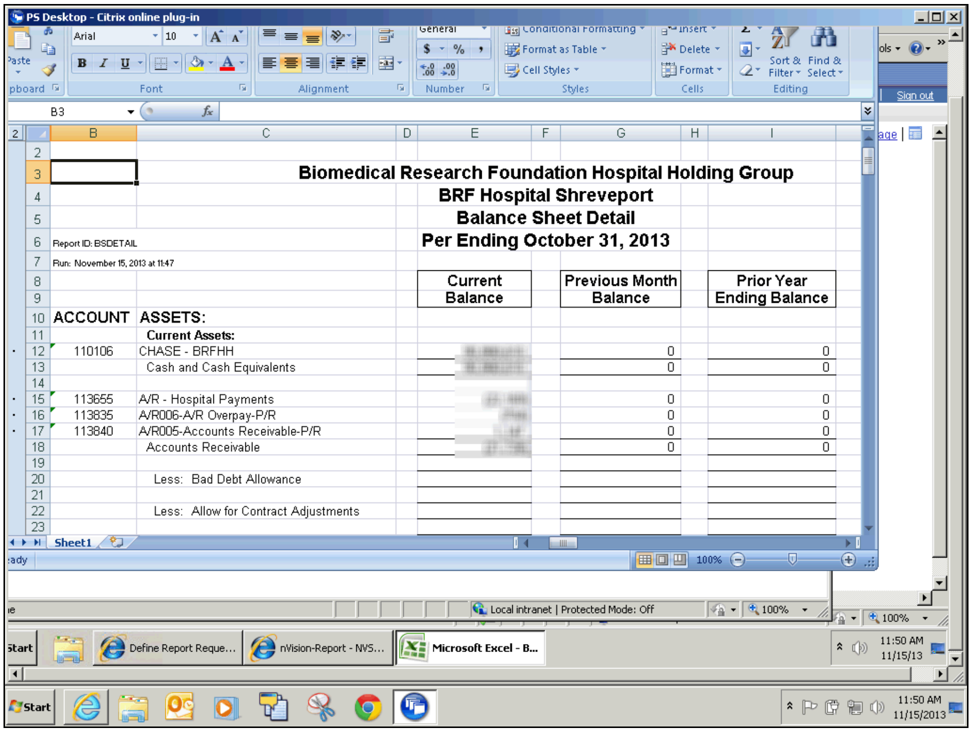
Step	Action
16.	Click the button to the right of the **Server Name** field.
17.	Click the **PSNT** list item. PSNT
18.	Click the **OK** button. OK
19.	As the report begins to run, a pop-up window displays. It will display the status of the report: Queued, Processing, Success, Error, etc.

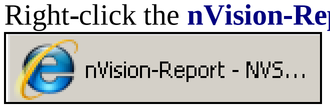


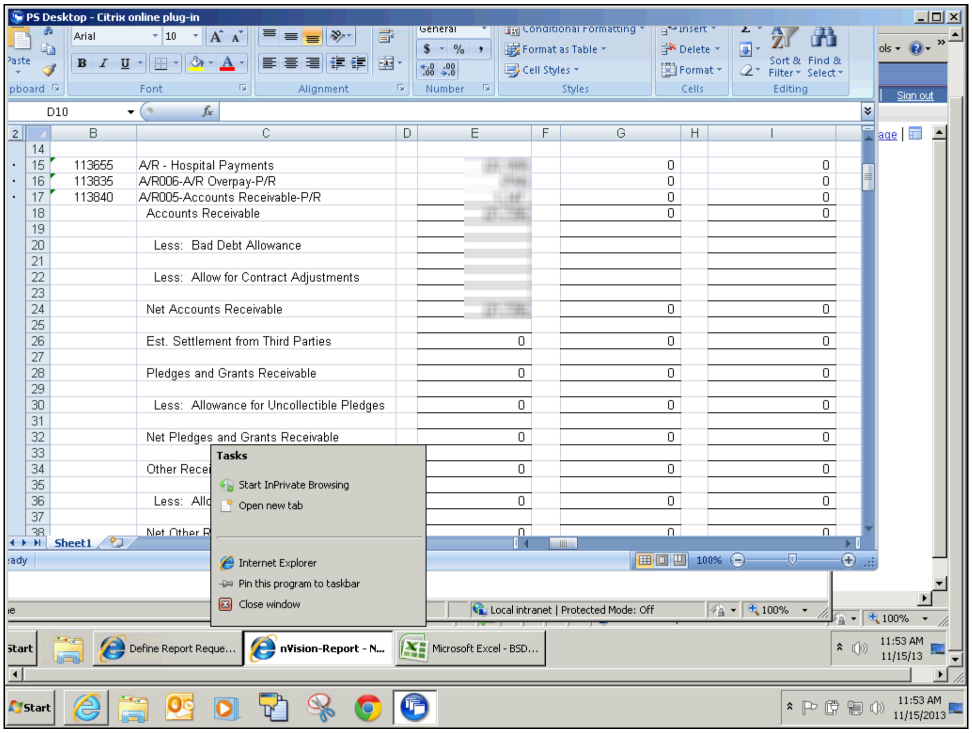
Step	Action
20.	When the report processes to **"Success"**, the pop-up window enlarges and a new Excel window displays. Sometimes, the report that opens will not be maximized.

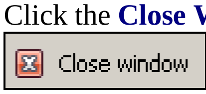


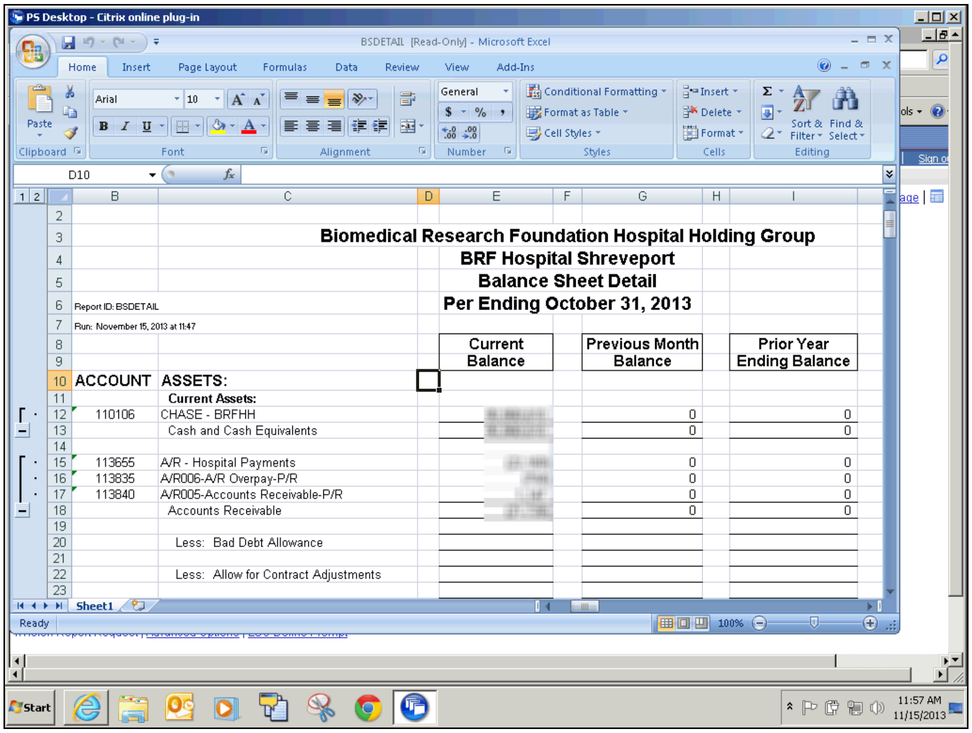
Step	Action
21.	Click the **Maximize** button. 
22.	You may print the report or perform any nVision drills or Excel functions on the spreadsheet as desired.
23.	Many nVision reports include Macros to perform tasks within the spreadsheet. On these reports, a Security Warning will display at the top of the spreadsheet indicating that the Macros are disabled. If the message appears, click the **Enable Content** button to enable Macros. 
24.	A pop-up Security Warning message displays. Click the **Yes** button. ***NOTE: There is a method to enable all of the macros within Excel for your computer. The instructions to perform this task are included in the Appendix to this guide.*** 
25.	After enabling the Macro content and pressing the **Yes** button, you are returned to the spreadsheet. The Security Warning message has disappeared and the Macros included in this file are enabled.

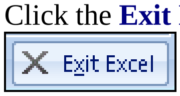
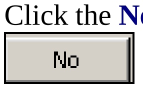


Step	Action
26.	Notice the grey taskbar at the bottom of the screen. To the right of the Start button, there are 2 Internet Explorer icons for PeopleSoft and an Excel icon. The Excel icon is active. To navigate back to the report request in PeopleSoft from Excel, simply click the **Define Report Request** icon.
27.	The second Internet Explorer icon, nVision-Report - NVSRUN...is for the processing window that was opened while running the report. This is no longer needed and should be closed. Right-click the **nVision-Report - NVSRUN** button. 



Step	Action
28.	Click the **Close Window** list item. 
29.	The processing window closes, leaving only the Report Request window available in Internet Explorer. Click the **Define Report Request** button to navigate back to the Report Request page. 
30.	Click the **Excel** button in the taskbar to navigate back to the Excel spreadsheet. 



Step	Action
31.	Click the **Office** button at the top left of the Excel window to close the window and exit Excel. 
32.	Click the **Exit Excel** button. 
33.	Click the **No** button. 
34.	This completes ***Process Basic Reports - Window Method***. **End of Procedure.**

BRF (University Health Hospitals) Enable DrillDown Feature (Optional)

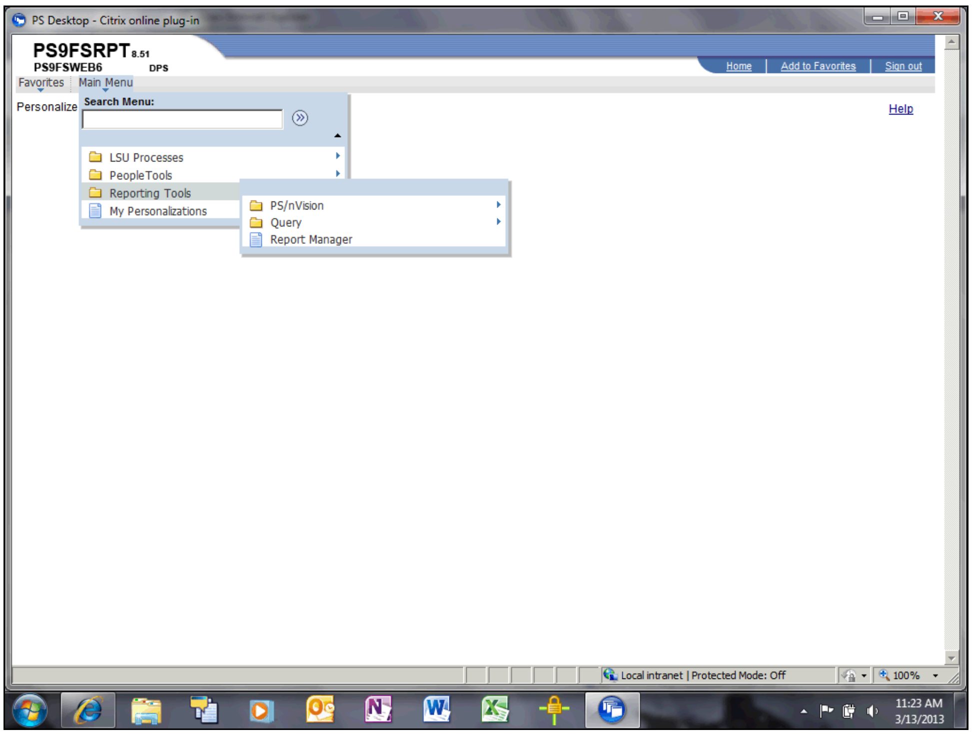
DrillDown is a feature that allows users to get more information on data contained in the report. Before performing the very first drill on any report, the drilldown (Drill to PIA) feature must be enabled. Once enabled, the drill feature will be available any time you run a report with nVision.

NOTE: This feature should be enabled at the PSDesktop level. If the feature is not available, follow these steps to enable drilldown.

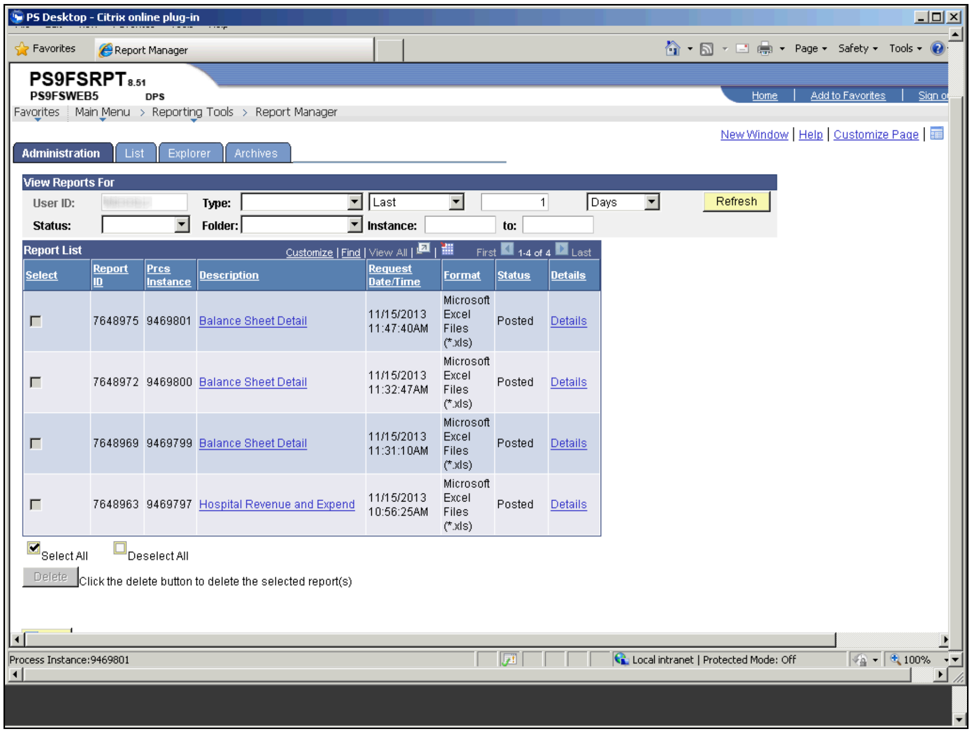
Procedure

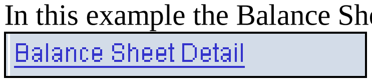
In this topic you will learn how to **Enable DrillDown Feature**.

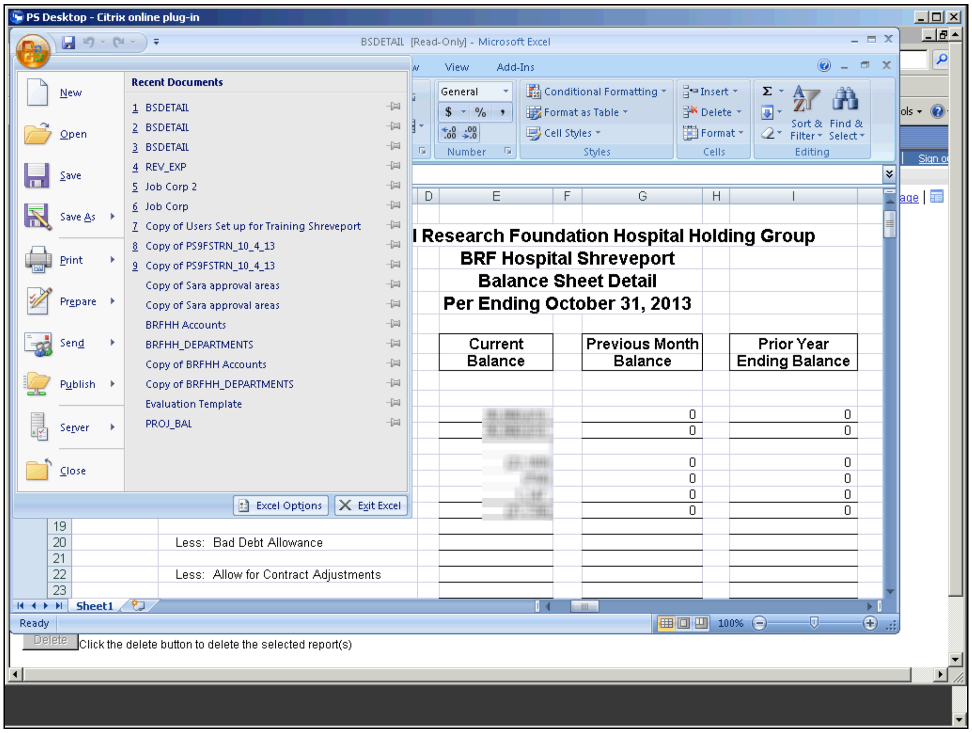
Step	Action
1.	Click the **Main Menu** button. Main Menu
2.	Click the **Reporting Tools** menu. Reporting Tools

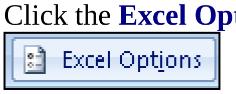
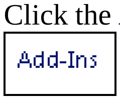


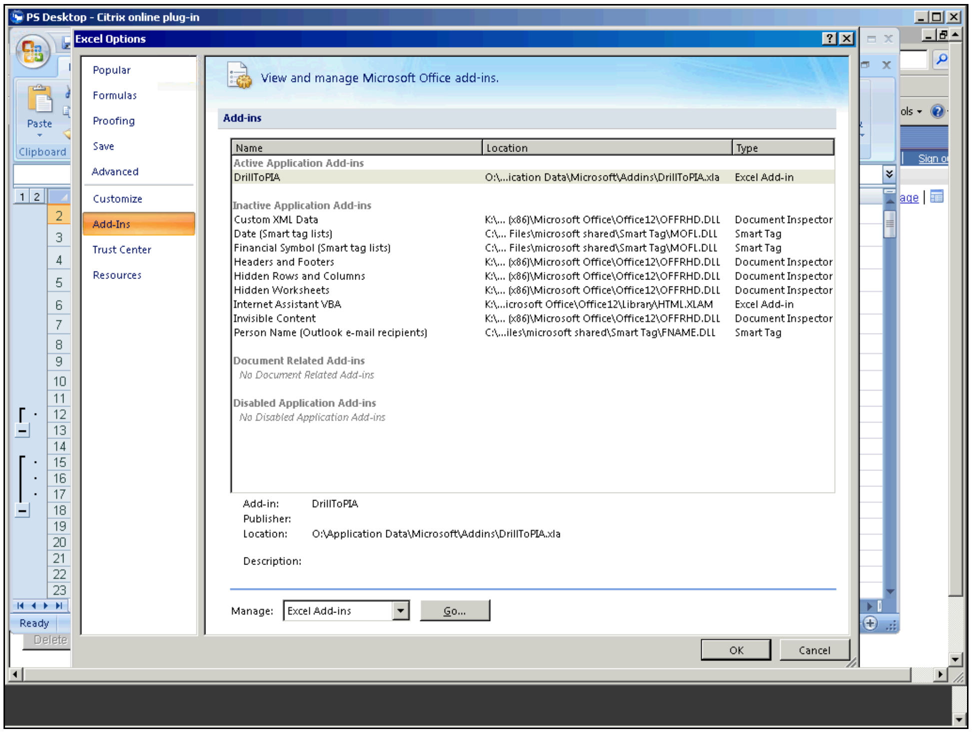
Step	Action
3.	Click the **Report Manager** list item. Report Manager

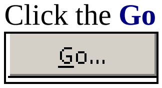


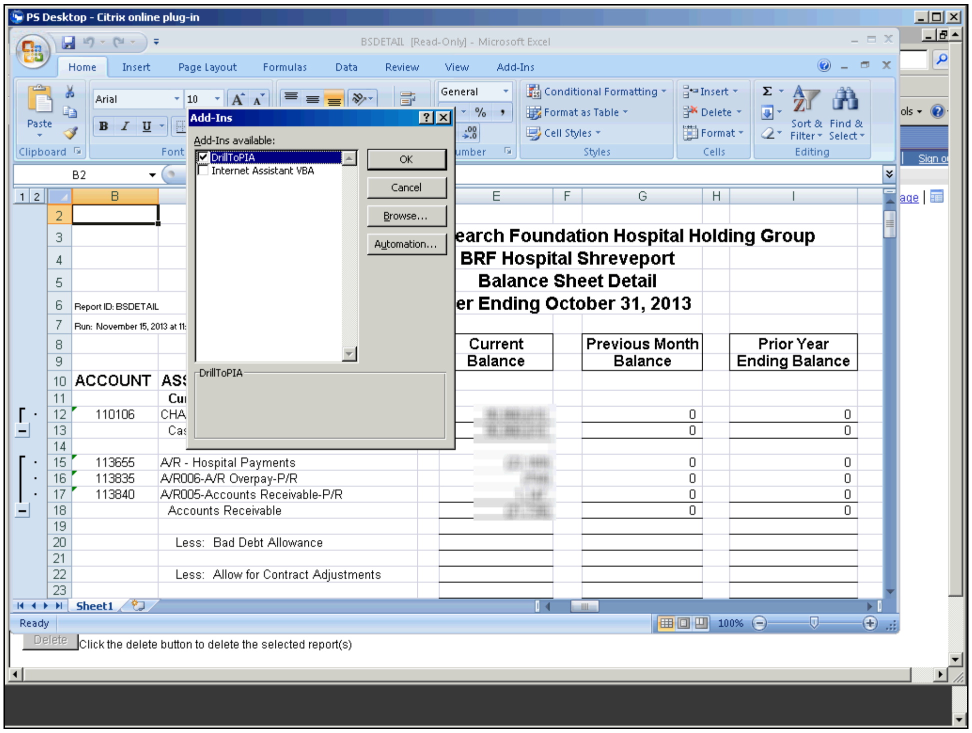
Step	Action
4.	Select a report and click the appropriate **Description** link. In this example the Balance Sheet Detail report is used. 
5.	Click the **Maximize** button. 
6.	If the Add-Ins menu is not available to you, then the DrillDown feature must be enabled. Once enabled, an Add-Ins option will be added next to the View option on your ribbon. Click the **Office** button. 

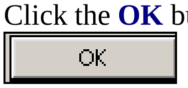


Step	Action
7.	Click the **Excel Options** button. 
8.	Click the **Add-Ins** link. 
9.	Click the **DrillToPIA** list item. 



Step	Action
10.	Click the **Go** button to the left of the Manage field. 
11.	A small pop-up box displays. Click the **DrillToPIA** option. 



Step	Action
12.	Click the **OK** button. 
13.	You are returned to your spreadsheet. DrillDown is enabled and a new menu option, **Add-Ins**, now displays on your ribbon.
14.	This completes ***Enable Drilldown Feature***. **End of Procedure.**

BRF (University Health Hospitals) Perform DrillDown

DrillDown allows users to gather additional information on the data contained in a report produced by nVision. In essence, users get a "peek under the hood" to see what information comprises the results displayed in the report.

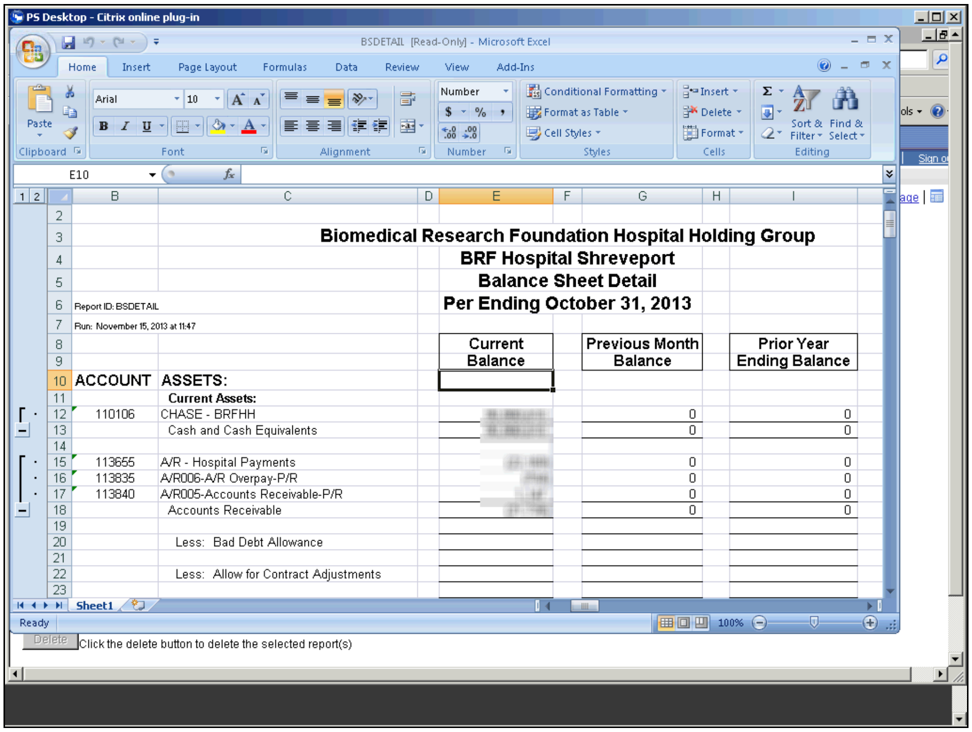
DrillDown

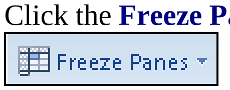
- Must be performed on cells that are at the intersection of a column and a row;
- May only be performed on cells that contain a number, not a formula;
- May perform additional drilldown on drilldown results; and
- Budget data is not presently drillable.

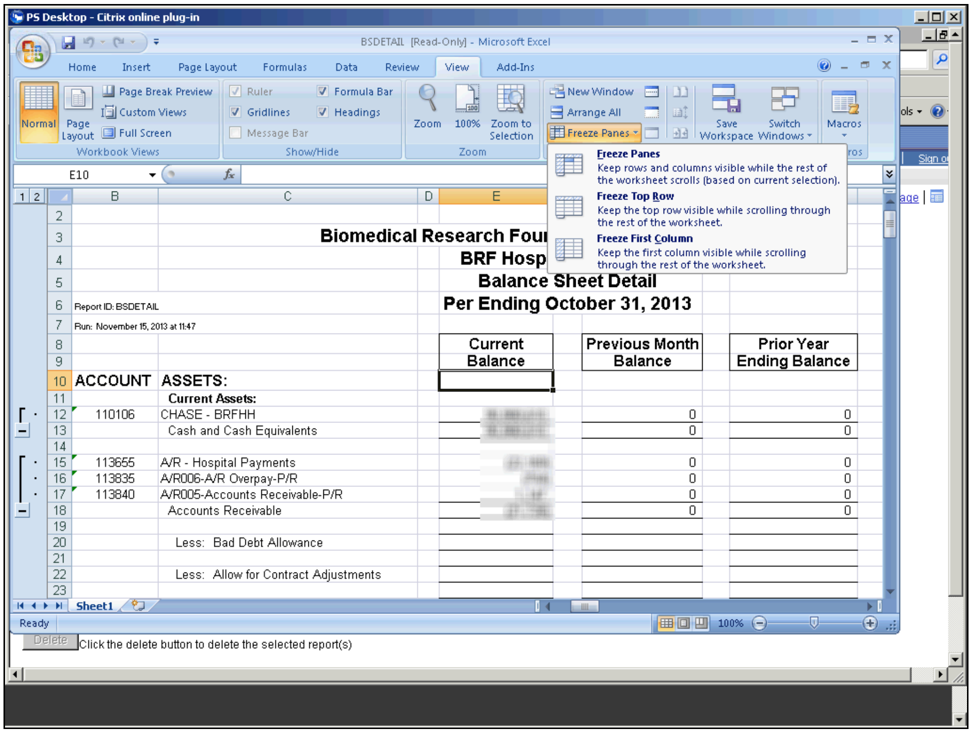
While reviewing the results of a report, you determine that you would like to get additional information; perhaps look at the individual period totals for an account or the Accounts Payable Detail for an account. DrillDown is the feature utilized to get this additional information.

Procedure

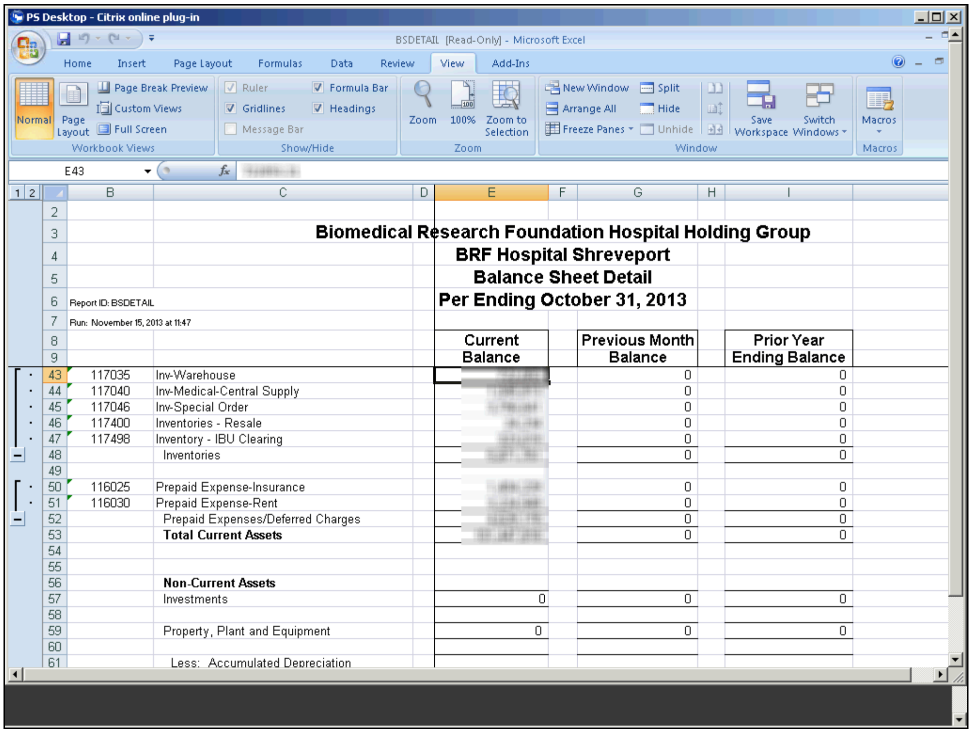
In this topic you will learn how to **Perform DrillDown**.

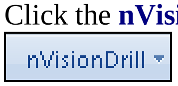


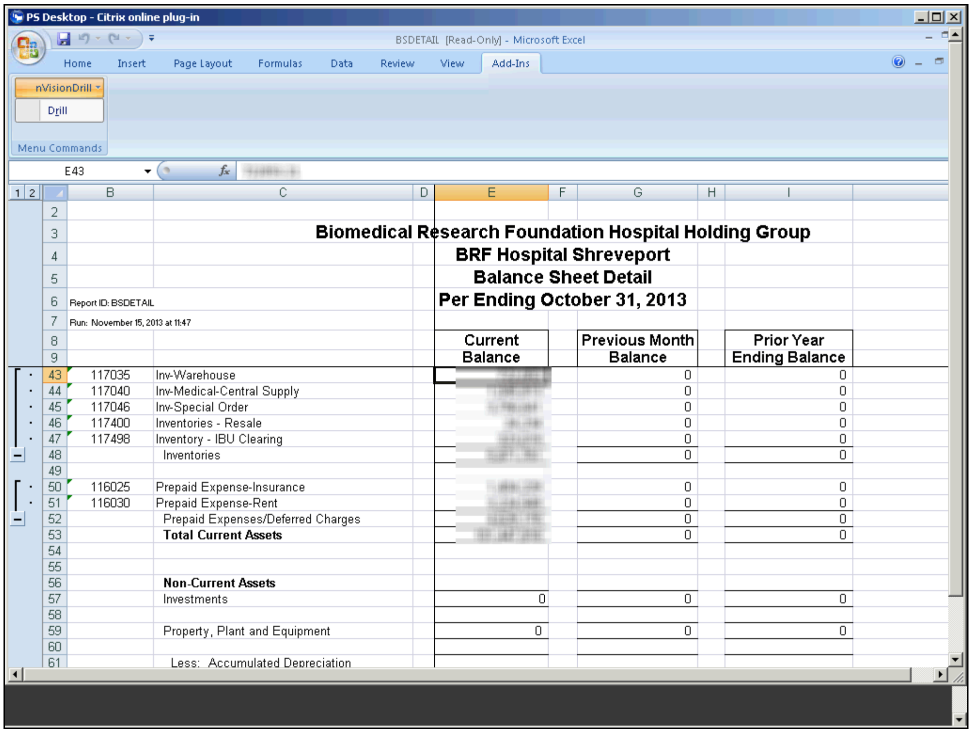
Step	Action
1.	While navigating through the spreadsheet, it is recommended that users **"Freeze Panes"** so that the row and column headers remain visible. Click the cell located directly below the **Current Balance** column header.
2.	Click the **View** tab at the top of the Excel screen. 
3.	Click the **Freeze Panes** option. 

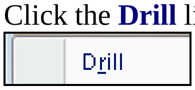


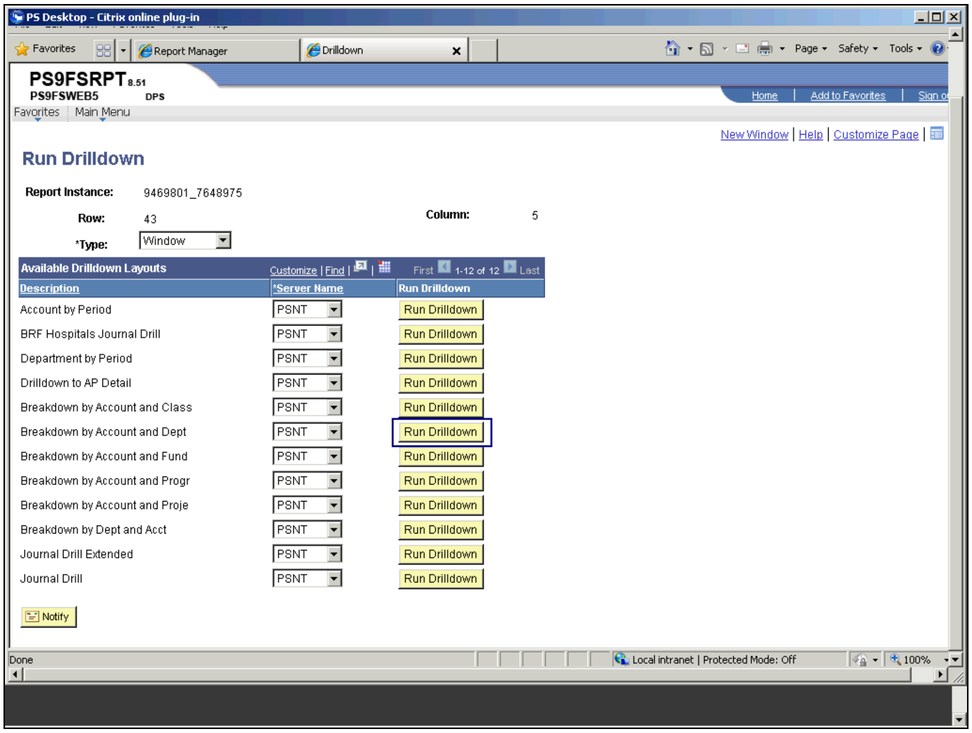
Step	Action
4.	Click the **Freeze Panes** list item. 
5.	In this example, you will drill on the Inv-Warehouse row and the Current Balance column; in the Account Assets Section of the report. Click the **Down** button of the scrollbar. 
6.	Click the **Inv-Warehouse** row cell in the **Current Balance** column. 



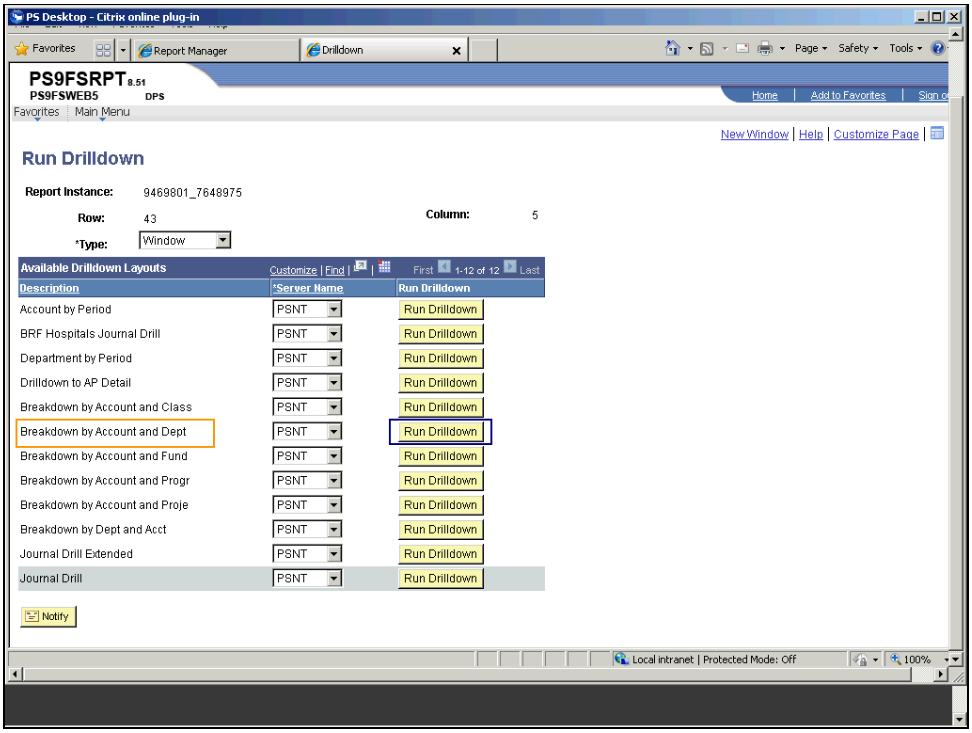
Step	Action
7.	Click the **Add-Ins** tab at the top of the screen. 
8.	Click the **nVisionDrill** option on the left of the Excel screen. 

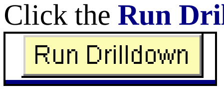


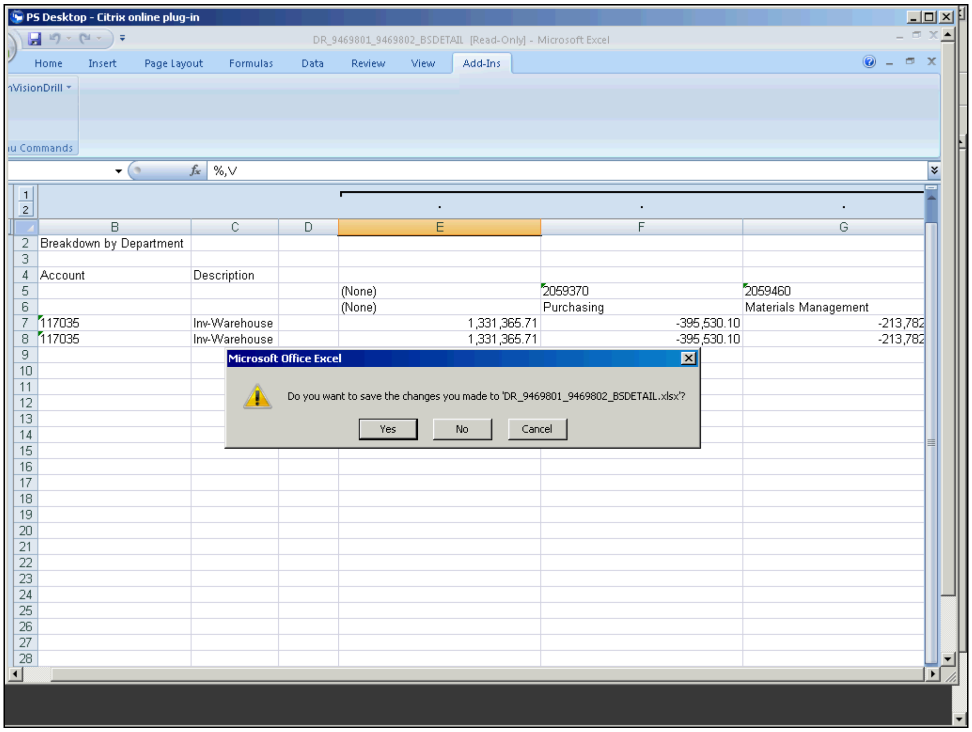
Step	Action
9.	Click the **Drill** list item. 

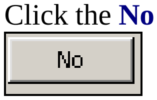


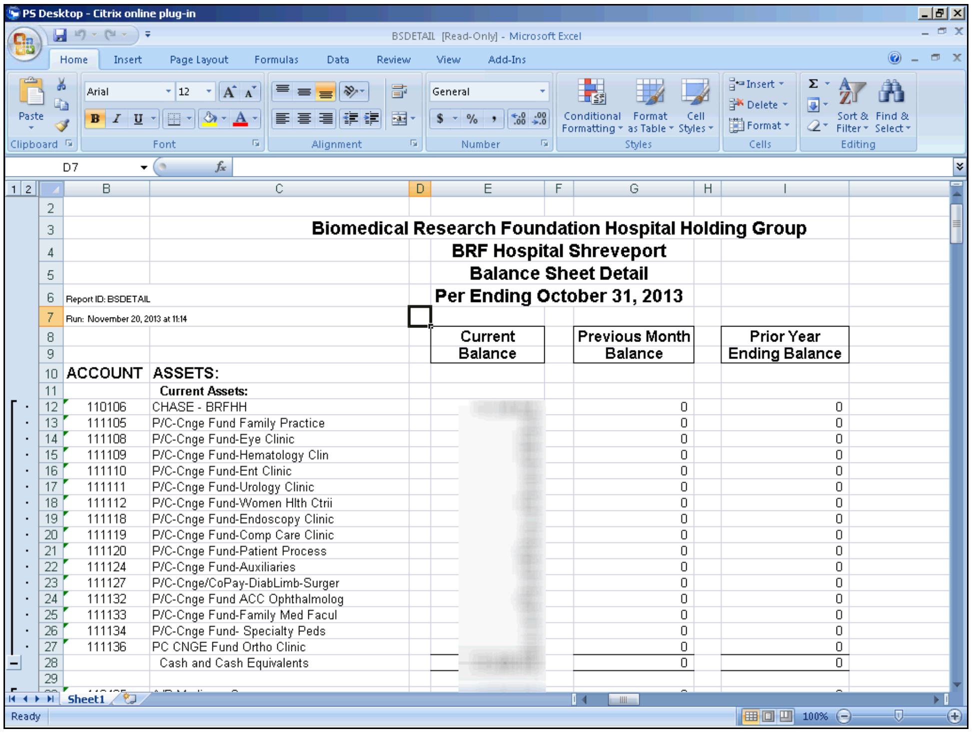
Step	Action
10.	A new PeopleSoft (Internet Explorer) tab opens. This tab contains the various drills that are available for use. Press the yellow Run DrillDown button to the right of the desired drill. In this example, the Breakdown by Account and Department drill is selected. ***NOTE: The <u>Type:</u> selection box at the top of the page displays Window so that the drill runs to the output option of Window. For drills, this is the default. The other option is Web, which would run the drill report and post it to the report repository.***

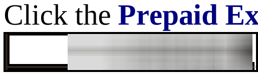
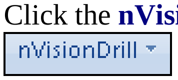
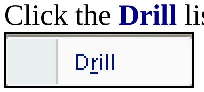


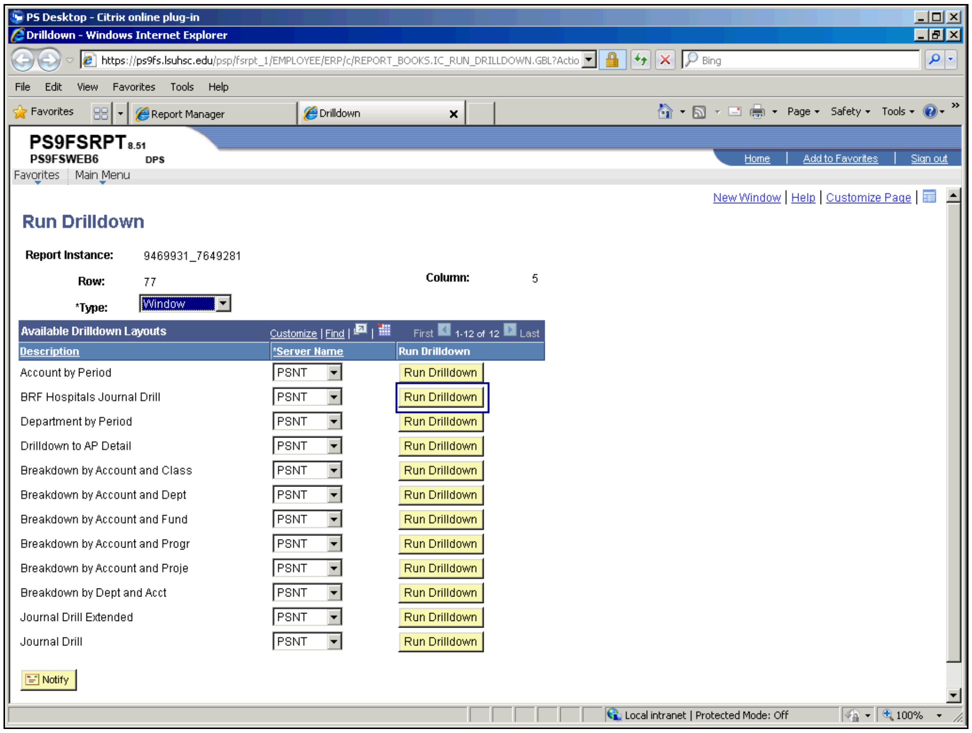
Step	Action
11.	Click the **Run DrillDown** button for the Breakdown by Account and Dept option. 
12.	When a report is run with the output type of Window, the nVision drill menu is replaced by the status window. Once completed, the status of **"Success"** displays in the window. At the same time, a new Excel spreadsheet window is created that will display the drill results.
13.	The Drill opens in a new window. Press the DR_xxxxx_xxxx window at the bottom of the page if it does not maximize automatically. Or, if the window opens but the files are not full screen, you may press the maximize icon to enlarge the file on the screen.
14.	Click the **Maximize** button. ***NOTE: Once the drill window is maximized, you may print the spreadsheet, perform any Excel functions, or even perform an additional drill.*** 
15.	Once you are finished with this drill file, you may close it by pressing the **lower** most **X** at the top right of the page. Click the **Close Window** button. 

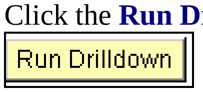


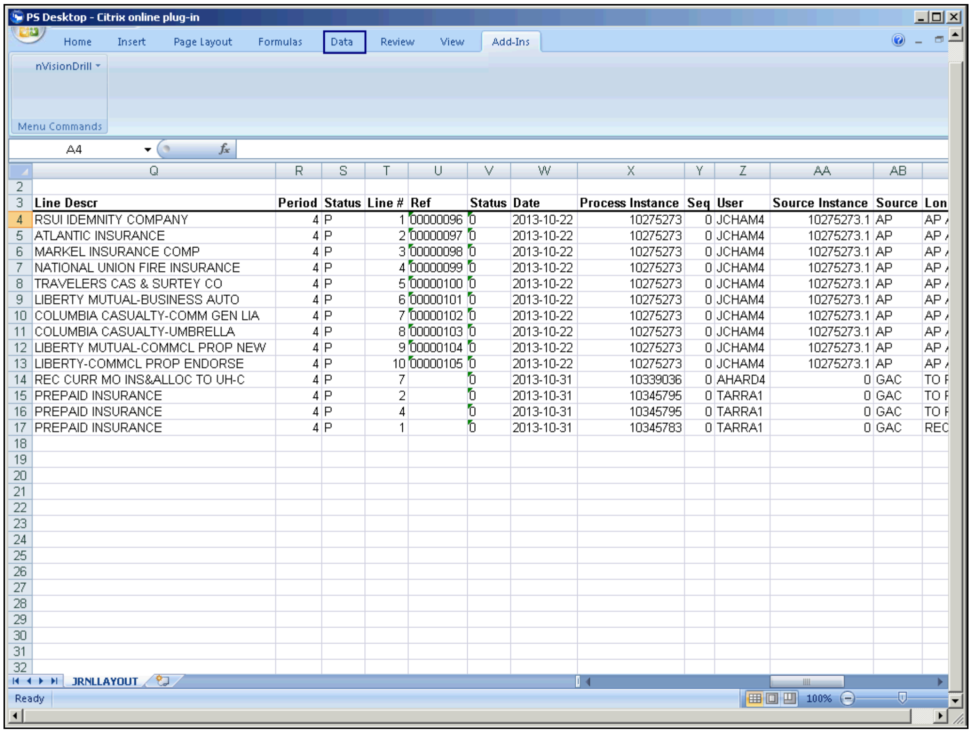
Step	Action
16.	Click the **No** button. 
17.	You are returned to the original nVision report file where you may perform additional drills if desired.



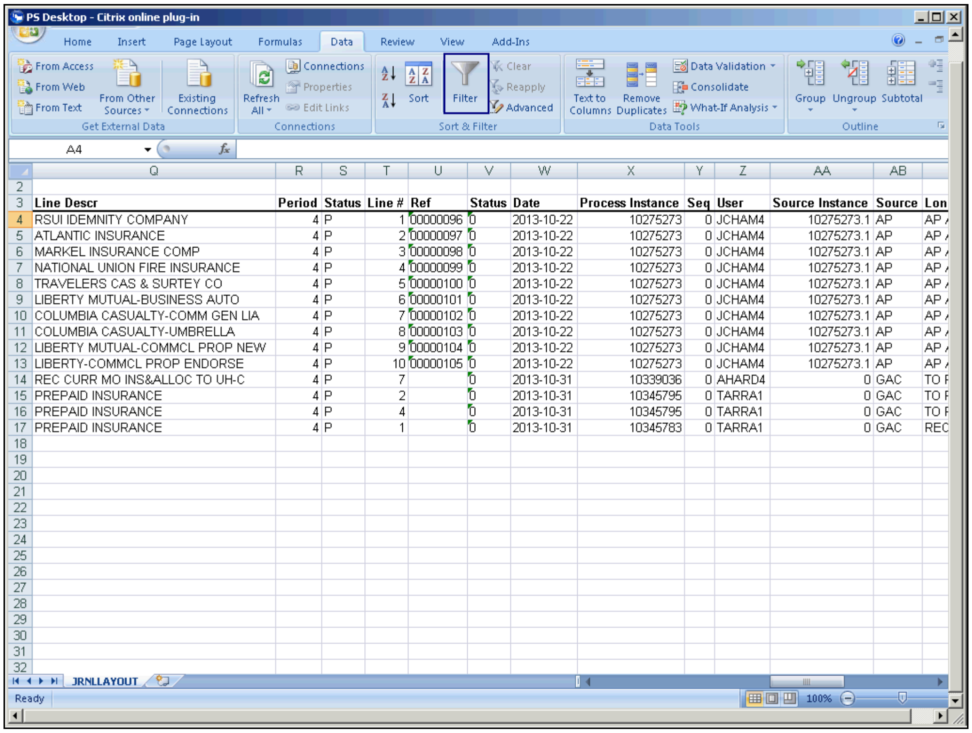
Step	Action
18.	In this example, you will drill on the Prepaid Expense-Insurance row cell in the Current Balance column. The drill option you will use is BRF Hospitals Journal Drill. Click the **Down** button of the scrollbar. 
19.	Click the **Prepaid Expense-Insurance** cell. 
20.	The Add-Ins menu is already displayed, so there is no need to select it. Click the **nVisionDrill** menu. 
21.	Click the **Drill** list item. 



Step	Action
22.	Click the **Run DrillDown** button for the BRF Hospitals Journal Drill option. 
23.	When a report is run in the output type of Window, the nVision drill menu is replaced by the status window. Once completed, the status of ***"Success"*** displays in the window. At the same time, a new Excel window is created that will display the drill results.
24.	The Drill opens in a new window. Press the DR_xxxxx_xxxx window at the bottom of the page if it does not display automatically. If the window opens but is not maximized, press the maximize button to enlarge the report. Click the **Maximize** button. 

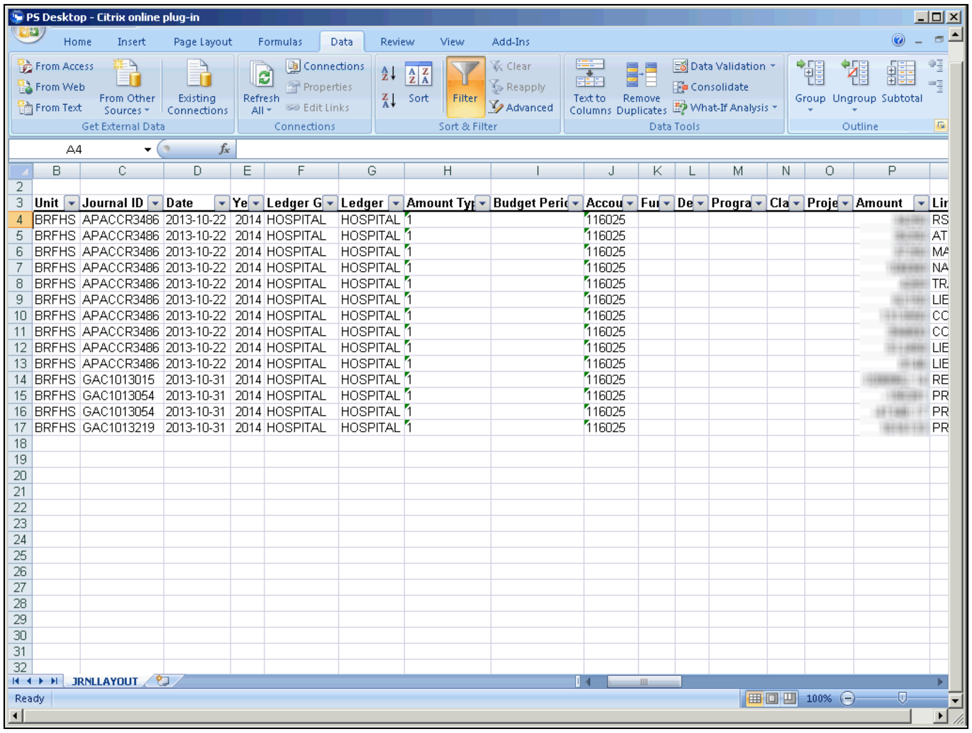


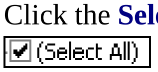
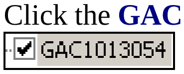
Step	Action
25.	In many instances, users will want to filter the drill results to limit the data by a specific department, fund, period, or other criterion. Autofilter is used to perform this task. Click the **Data** menu. 

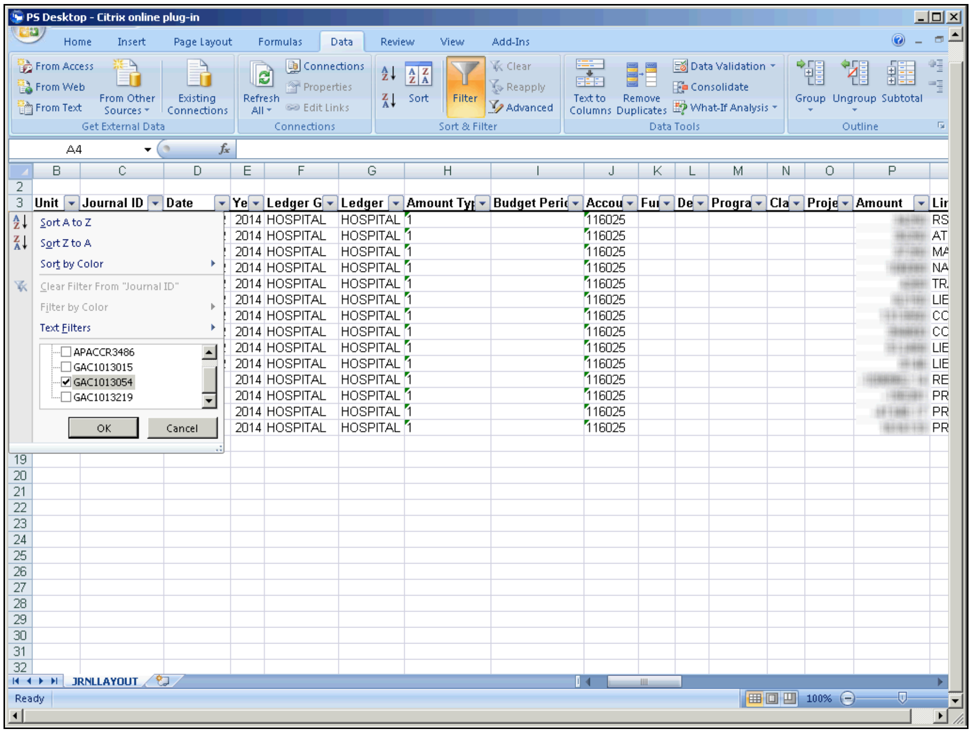


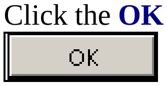
Line Descr	Period	Status	Line #	Ref	Status	Date	Process Instance	Seq	User	Source Instance	Source	Lon
RSUI IDEMNITY COMPANY	4	P	1	00000096	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
ATLANTIC INSURANCE	4	P	2	00000097	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
MARKEL INSURANCE COMP	4	P	3	00000098	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
NATIONAL UNION FIRE INSURANCE	4	P	4	00000099	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
TRAVELERS CAS & SURTEY CO	4	P	5	00000100	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
LIBERTY MUTUAL-BUSINESS AUTO	4	P	6	00000101	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
COLUMBIA CASUALTY-COMM GEN LIA	4	P	7	00000102	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
COLUMBIA CASUALTY-UMBRELLA	4	P	8	00000103	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
LIBERTY MUTUAL-COMMCL PROP NEW	4	P	9	00000104	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
LIBERTY-COMMCL PROP ENDORSE	4	P	10	00000105	0	2013-10-22	10275273	0	JCHAM4	10275273.1	AP	AP
REC CURR MO INS&ALLOC TO UH-C	4	P	7		0	2013-10-31	10339036	0	AHARD4	0	GAC	TO F
PREPAID INSURANCE	4	P	2		0	2013-10-31	10345795	0	TARRA1	0	GAC	TO F
PREPAID INSURANCE	4	P	4		0	2013-10-31	10345795	0	TARRA1	0	GAC	TO F
PREPAID INSURANCE	4	P	1		0	2013-10-31	10345783	0	TARRA1	0	GAC	REC

Step	Action
26.	Click the **Filter** menu. 



Step	Action
27.	Each column heading is now populated with a drop-down arrow. Click the button to the right of the **Journal ID** field. 
28.	Click the **Select All** option. 
29.	Click the **GAC1013054** option. 

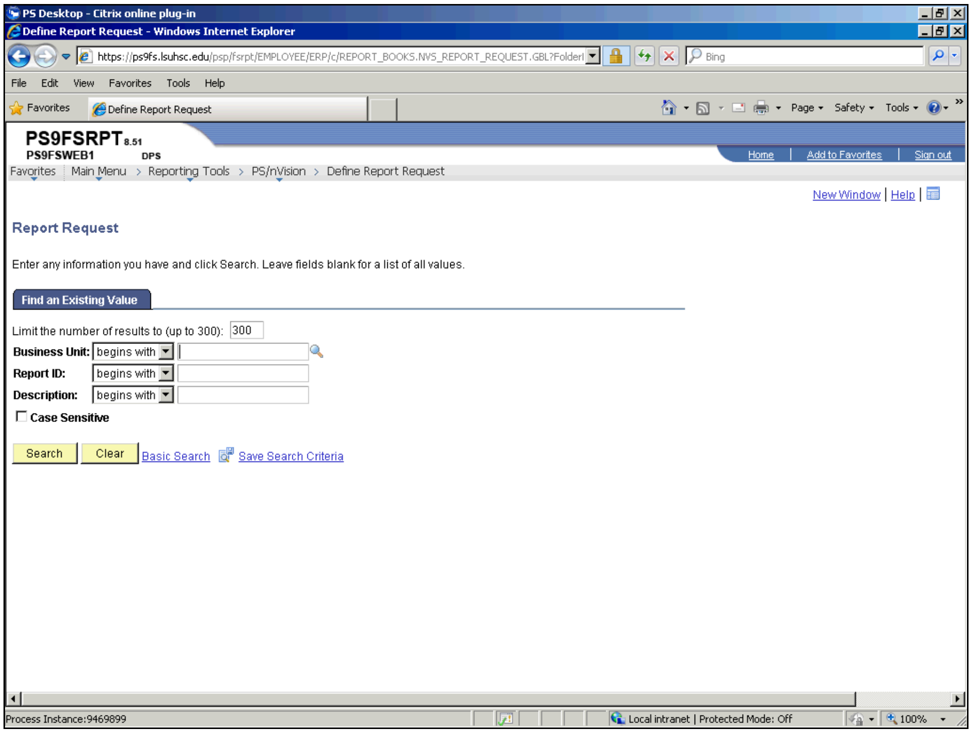


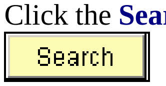
Step	Action
30.	Click the **OK** button. 
31.	The spreadsheet now displays only the results for that Journal ID. To return to the full listing, press the filter arrow next to Journal ID and choose the checkbox next to Select All.
32.	This completes ***Perform DrillDown***. **End of Procedure.**

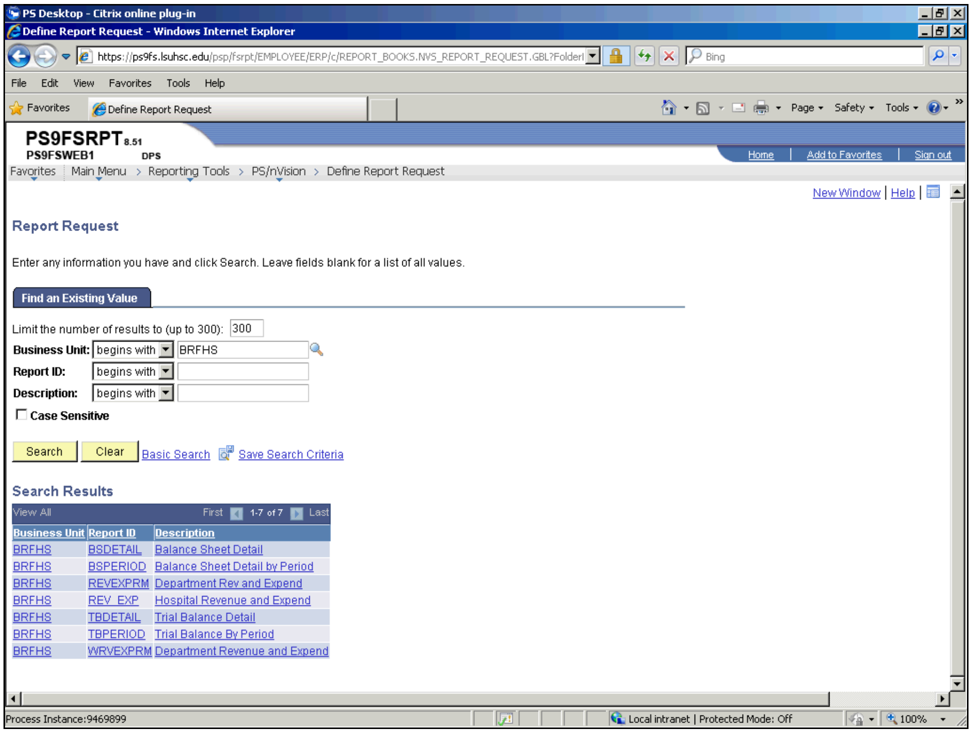
BRF (University Health Hospitals) Process Reports - Output type PRINTER

Procedure

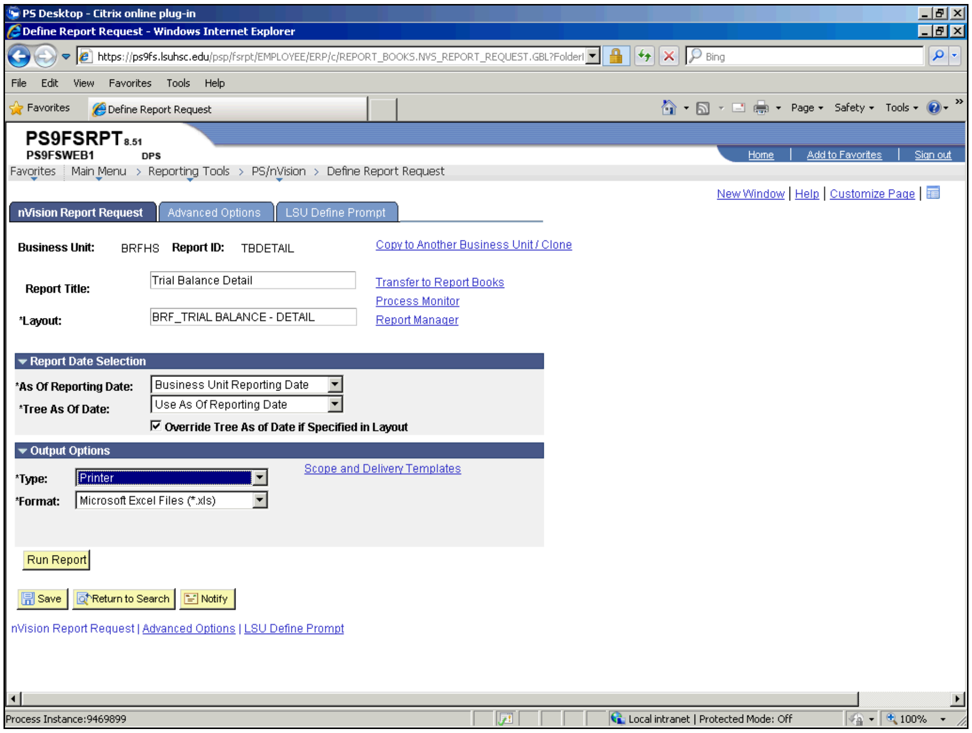
In this topic you will learn how to **Process Reports - Output type PRINTER**.

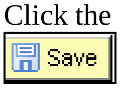
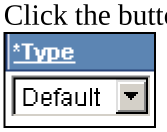


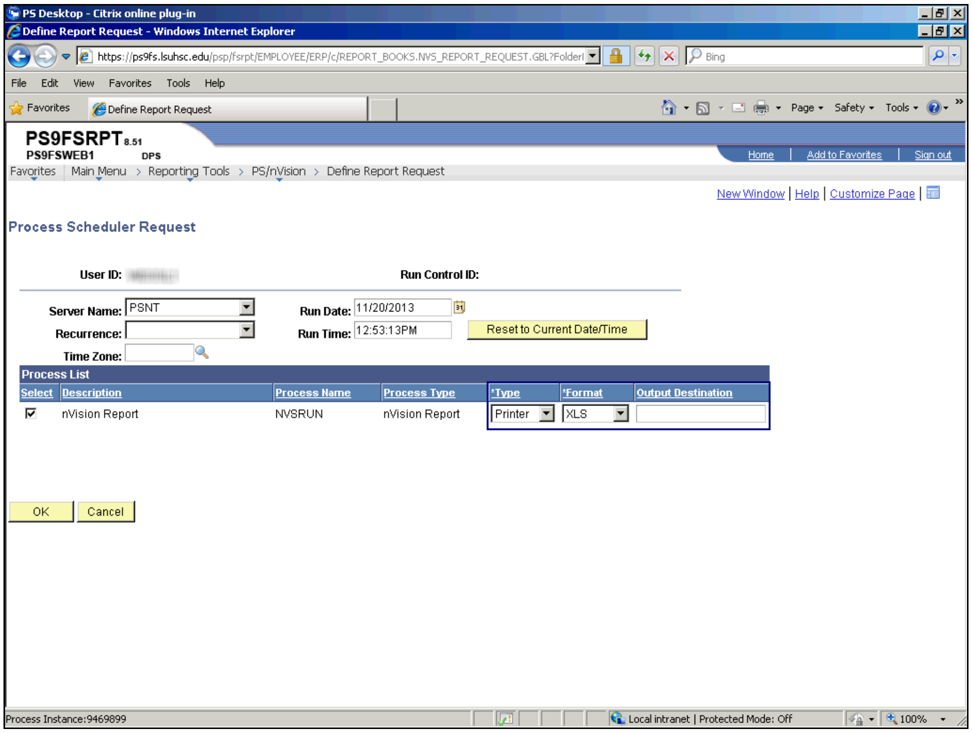
Step	Action
1.	Navigate to the Report Request search page as follows: **Main Menu > Reporting Tools > PS/nVision > Define Report Request**
2.	Enter the desired information into the **Business Unit** field. Enter "**BRFHS or BRFHM**".
3.	Click the **Search** button. 

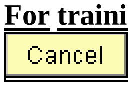


Step	Action
4.	Click the **TBDETAIL** link. 
5.	Click the button to the right of the **Type** field. 
6.	Click the **Printer** list item. 



Step	Action
7.	Click the **Save** button. 
8.	Click the **Run Report** button. 
9.	Click the button to the right of the **Server Name** field. 
10.	Click the **PSNT** list item. 
11.	On the Process Scheduler Request page, you must select the Type as Printer. Click the button to the right of the **Type** field. 
12.	Click the **Printer** list item. 
13.	Once the Type is changed to "Printer", the Format option changes to "XLS" and a Output Destination field displays.



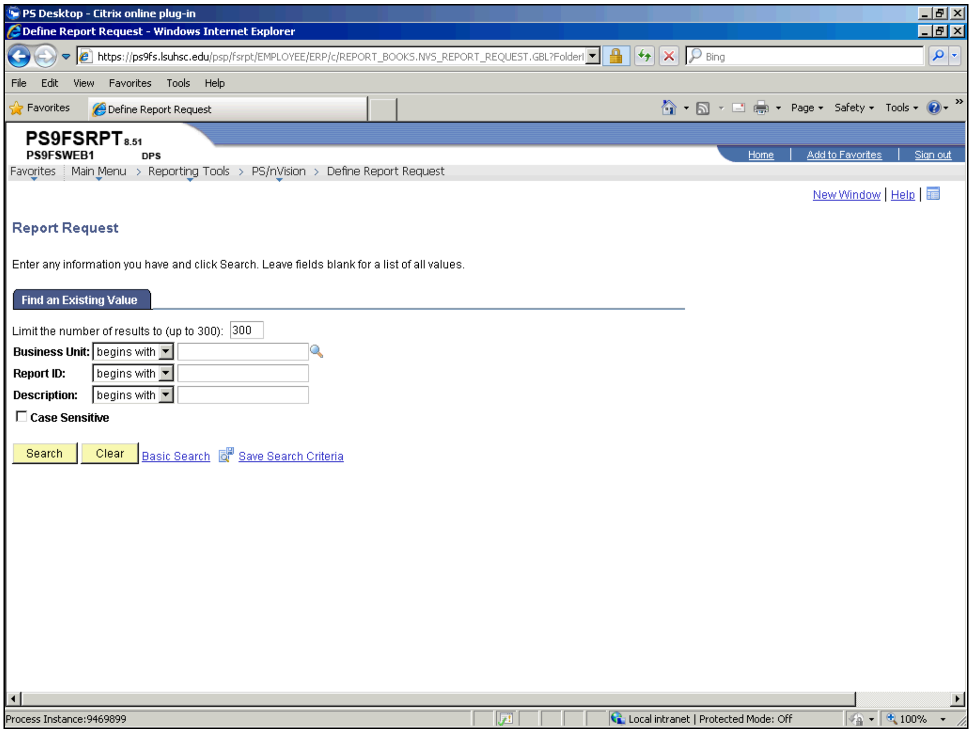
Step	Action
14.	***In the Output Destination box, enter the network printer to which the report will be sent. If you are unsure of the network printer to which you should send the report, contact your local PC supporter.*** **For training purposes only**, enter the desired information into the **Output Destination** field. Enter "**\\lafprnsrv\LANIER**".
15.	You would then click the OK button to return to the Report Request page. The report will process and then be sent to the selected printer. **For training purposes only**, click the **Cancel** button. 
16.	This completes ***Process Reports - Output type PRINTER***. **End of Procedure.**

BRF (University Health Hospitals) Process Reports - Output type E-MAIL

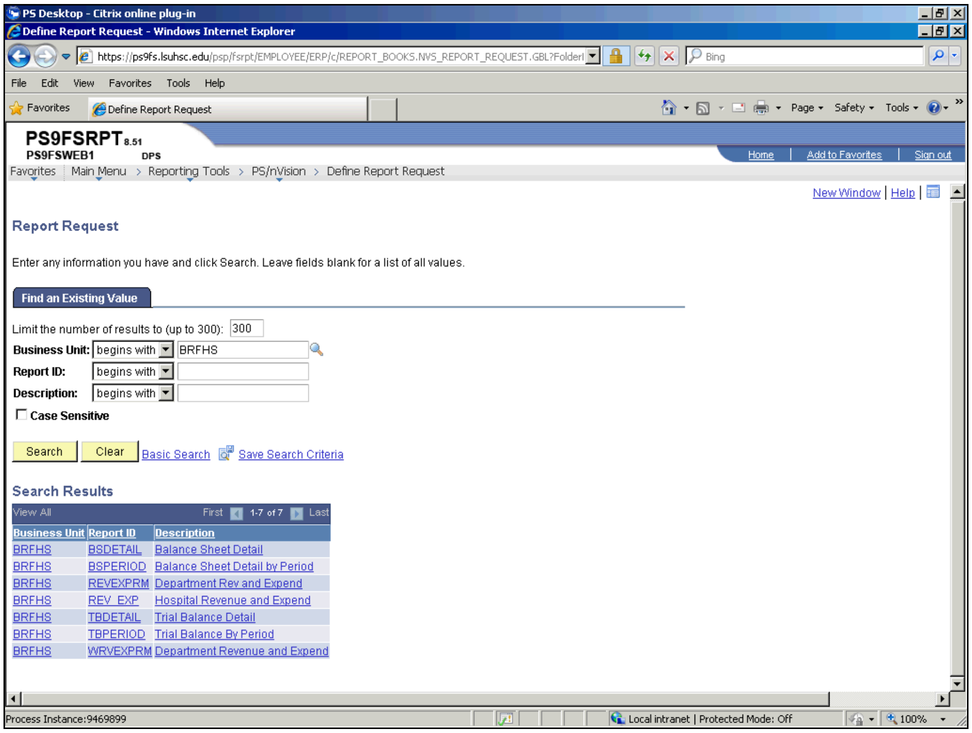
nVision Reports may also be emailed directly to other PeopleSoft users. The report request is used to define the user to whom the report will be sent. When using this feature, you will not have the opportunity to review the report prior to sending it via email.

Procedure

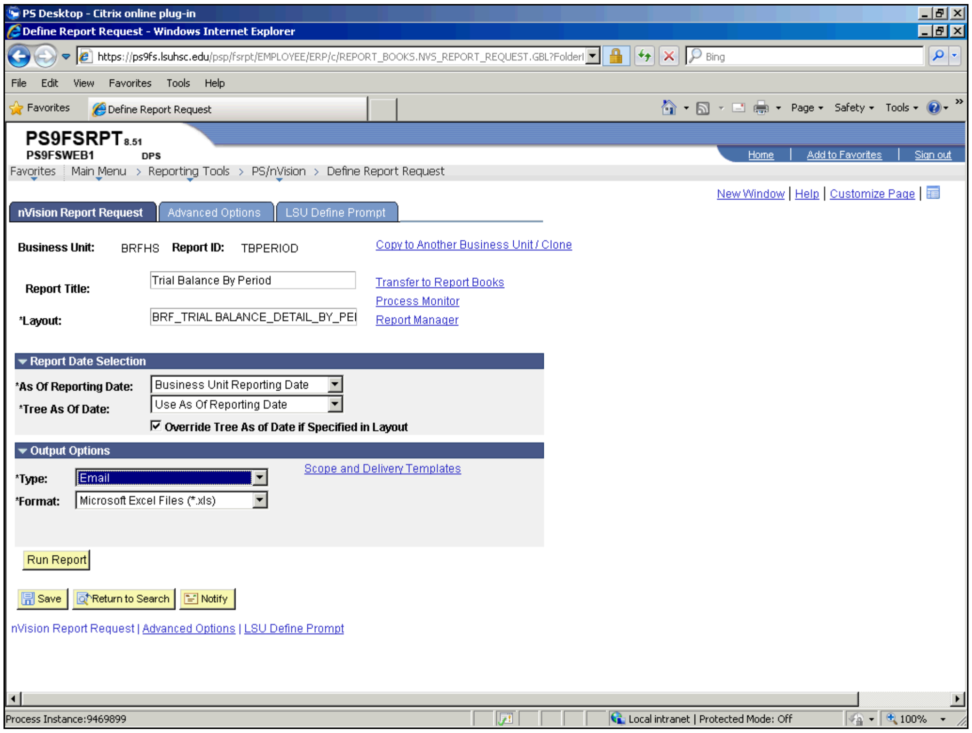
In this topic you will learn how to **Process Reports - Output type E-MAIL**.



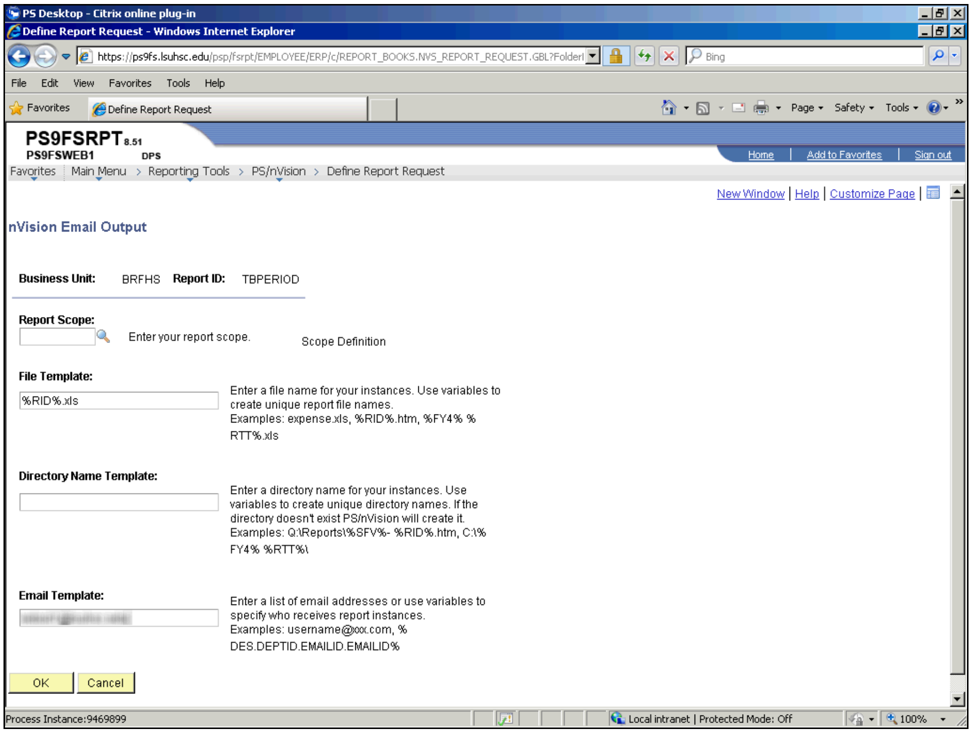
Step	Action
1.	Navigate to the Report Request search page as follow: **Main Menu > Reporting Tools > PS/nVision > Define Report Request**
2.	Enter the desired information into the **Business Unit** field. Enter "**BRFHS or BRFHM**".
3.	Click the **Search** button. Search



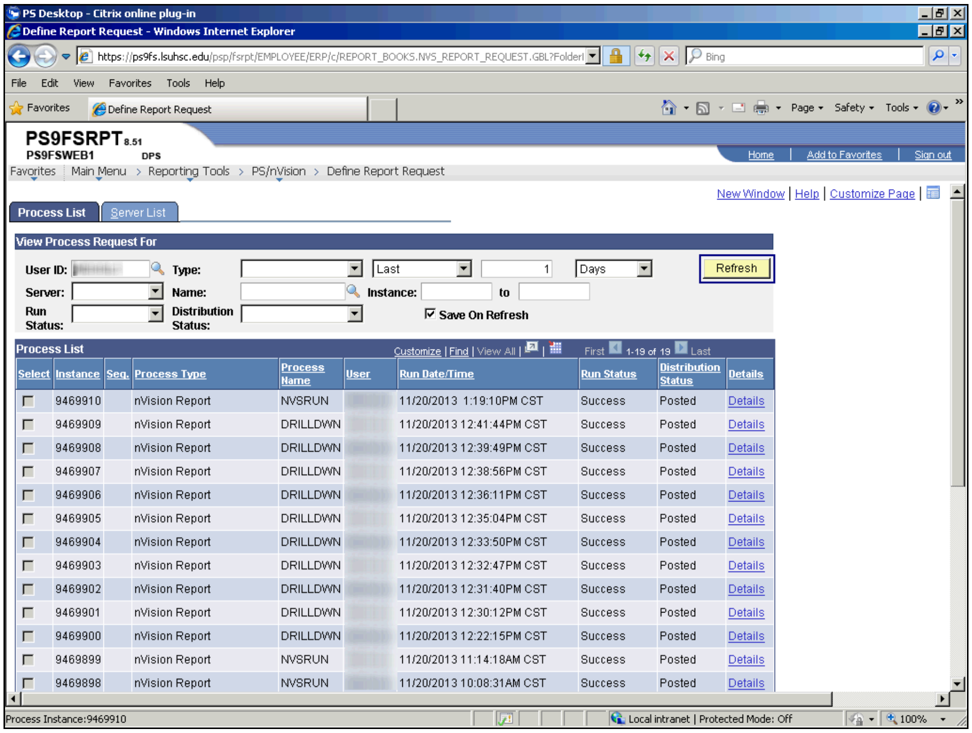
Step	Action
4.	Click the **TBPERIOD** link. TBPERIOD
5.	Click the button to the right of the **Type** field. 
6.	Click the **Email** list item. Email

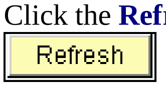


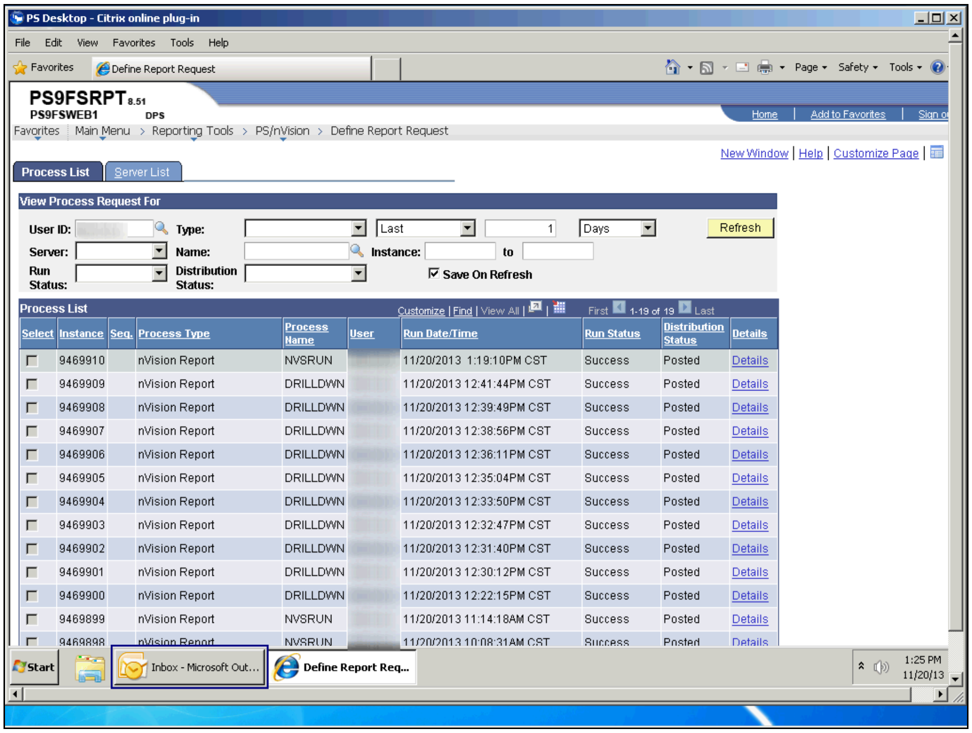
Step	Action
7.	Click the **Scope and Delivery Templates** link. Scope and Delivery Templates
8.	On the nVision Email Output page, enter the recipient's email address in the Email Template field. Multiple user email addresses can be entered, but **<u>must</u>** be separated by a comma (e.g. xxxxxx@lsuhsc.edu, xxxxxx@lsuhsc.edu). Enter the desired information into the **Email Template** field. Enter "**Recipient's Email Address**".

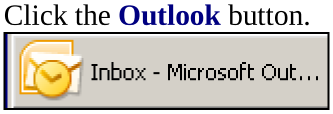


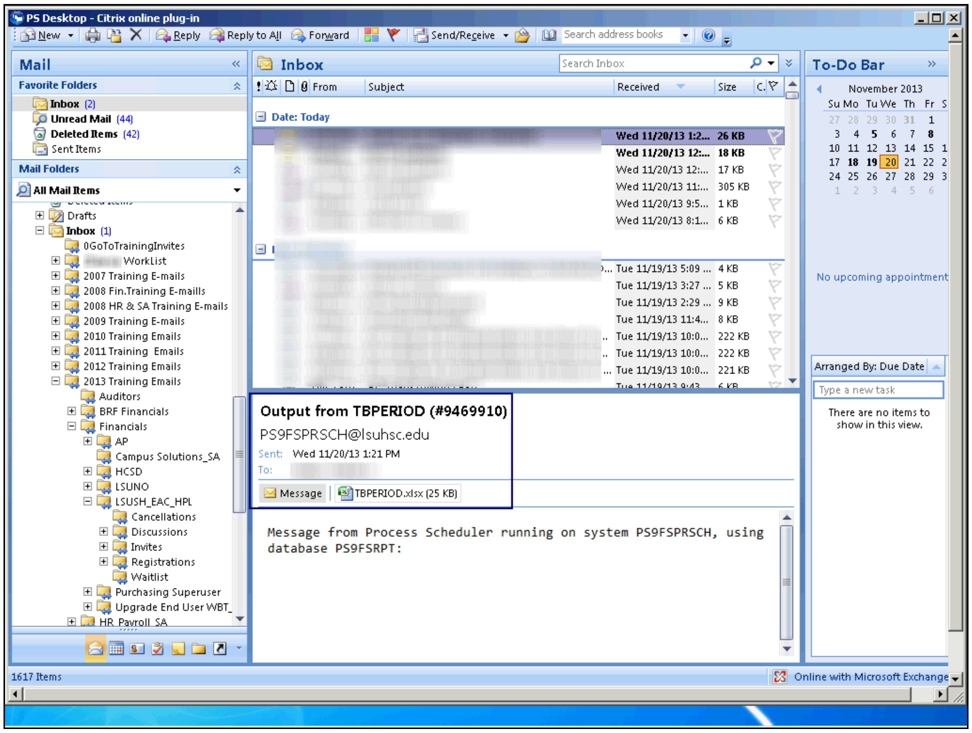
Step	Action
9.	Click the **OK** button. OK
10.	Click the **Save** button. Save
11.	Click the **Run Report** button. Run Report
12.	Click the button to the right of the **Server Name** field.
13.	Click the **PSNT** list item. PSNT
14.	Click the **OK** button. OK
15.	Click the **Process Monitor** link. Process Monitor



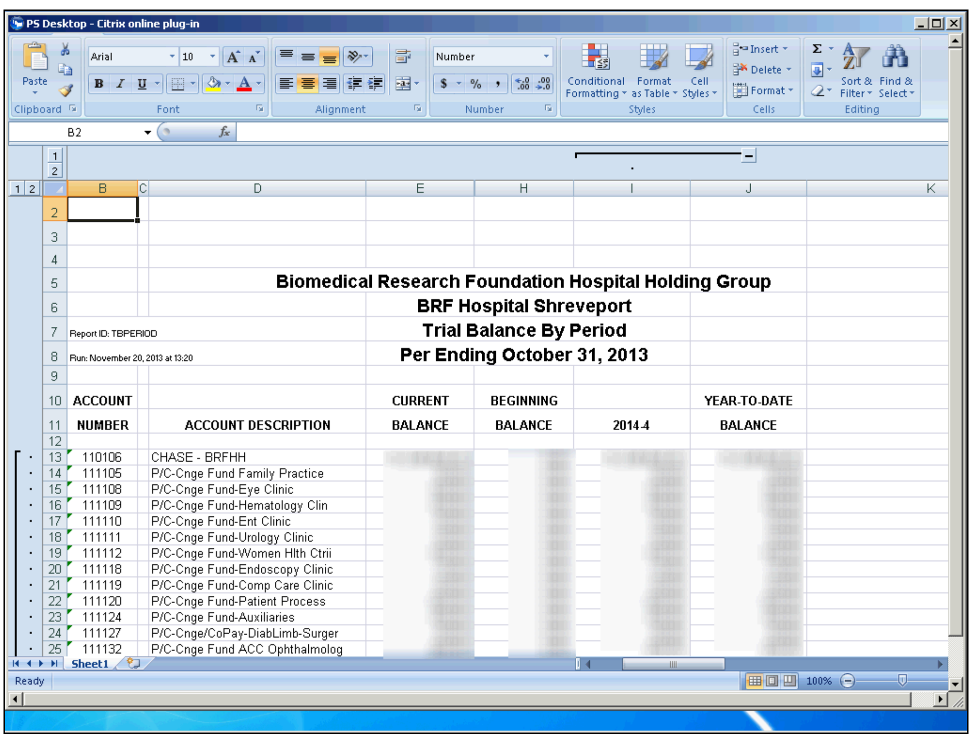
Step	Action
16.	Click the Refresh button every 15 - 20 seconds until the Distribution Status is "Posted". Click the **Refresh** button. 



Step	Action
17.	Once the Distribution Status = Posted, the system will generate and send an email to the listed email account with the report attached. ***NOTE: The email will be sent from PS9FSPRSCH@lsuhsc.edu.*** Click the **Outlook** button. 



Step	Action
18.	Double-click the **TBPERIOD.xls** attachment to view the report.



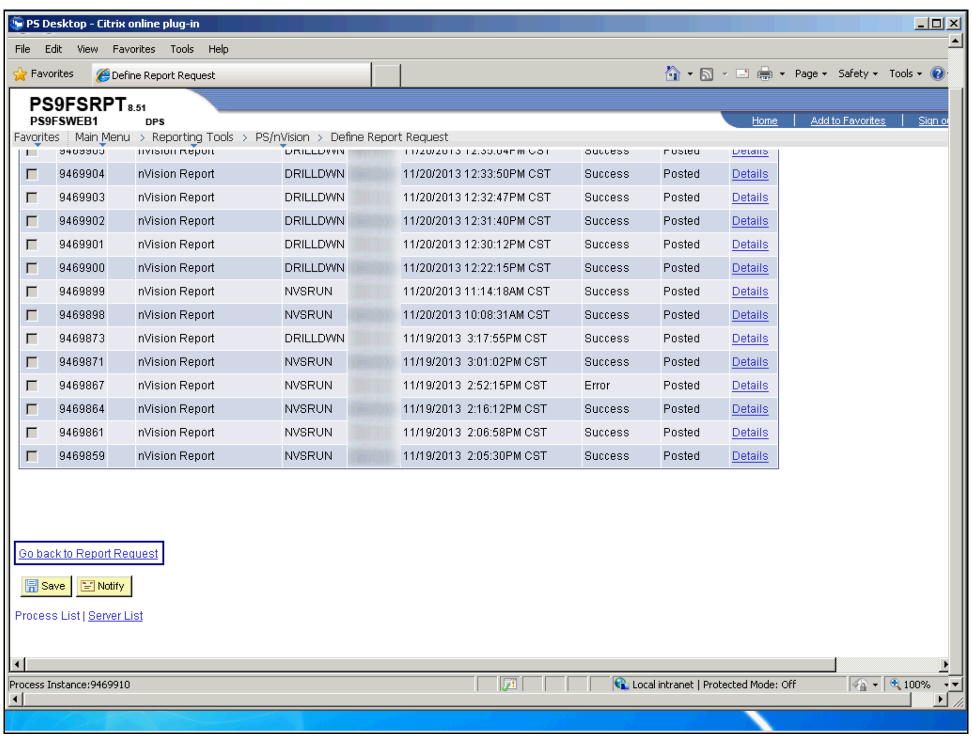
Step	Action
19.	A new window is opened and the report displays. Once the report is open, you may perform any drill or Excel function as desired. ***NOTE: You may receive a security message if the report is not from a trusted source.*** Click the **Close** button.
20.	This completes ***Process Reports - Output type E-MAIL***. **End of Procedure.**

BRF (University Health Hospitals) Process Reports - Output type E-MAIL (User may enter text in the body of email)

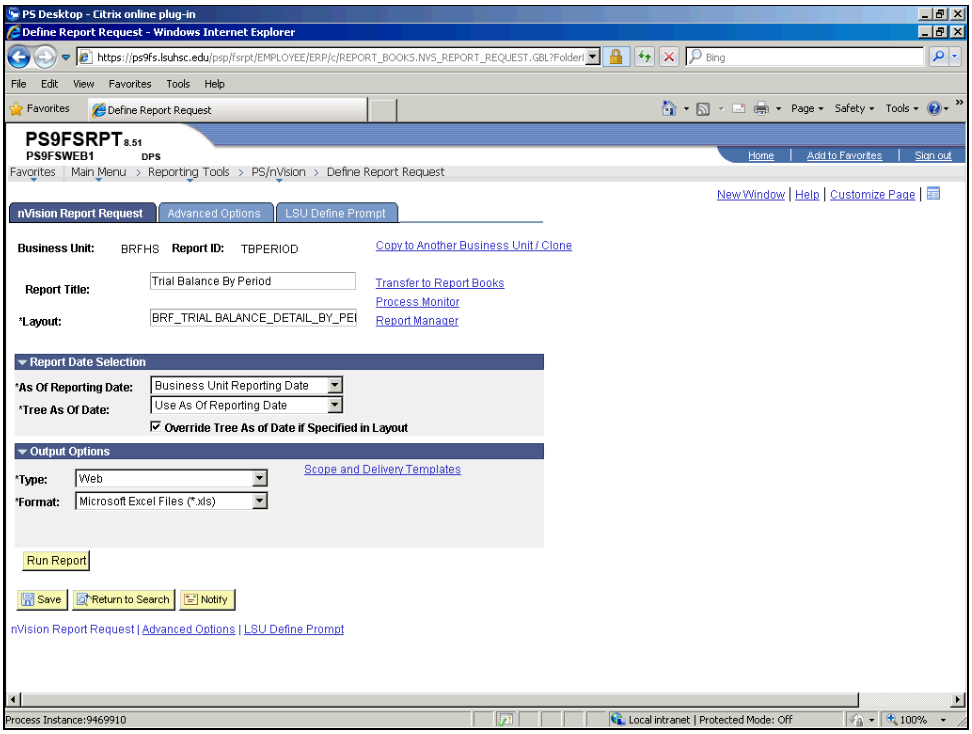
Procedure

In this topic you will learn how to **Process Reports - Output type E-MAIL (User may enter text in the body of email)**.

NOTE: This topic teaches the user an alternate method for distributing reports via email. This method allows the sender to enter text into the body of the email.

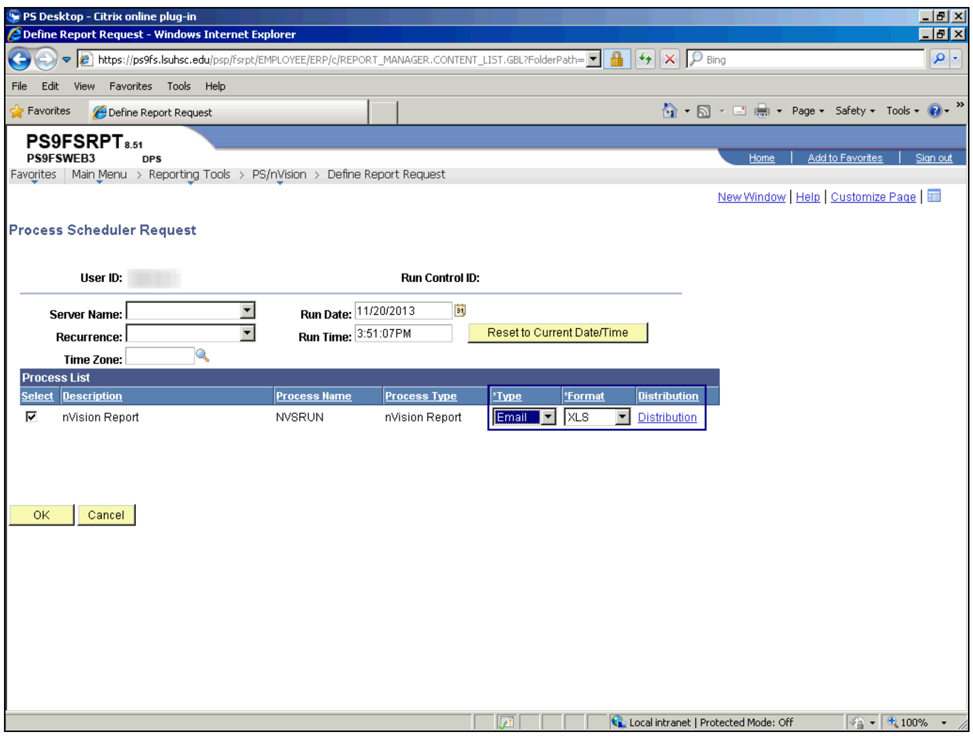


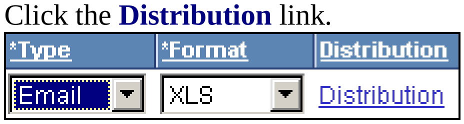
Step	Action
1.	For this exercise, the same Report Request as used in the last lesson will be utilized. Click the **Go back to Report Request** link.
2.	Click the button to the right of the **Type** field.
3.	Click the **Web** list item.
4.	Click the **Save** button.



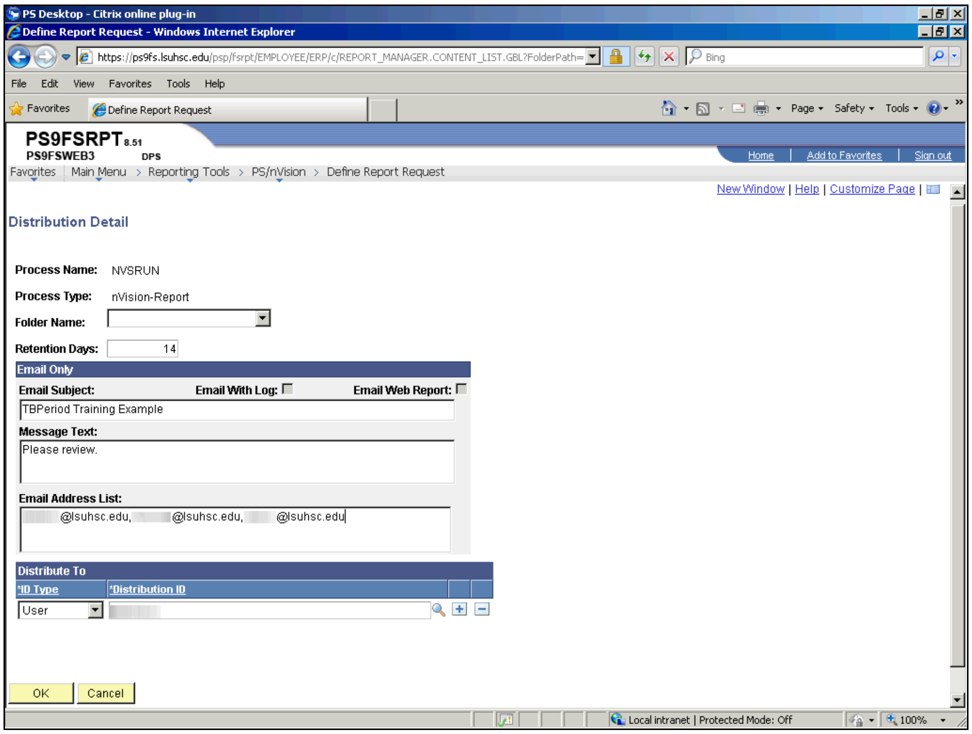
Step	Action
5.	Click the **Run Report** button.
6.	Click the button to the right of the **Server Name** field.
7.	Click the **PSNT** list item.

Step	Action
8.	On the Process Scheduler Request page, the Type must be changed from "Default" to "Email". Click the button to the right of the **Type** field. 
9.	Click the **Email** list item. 

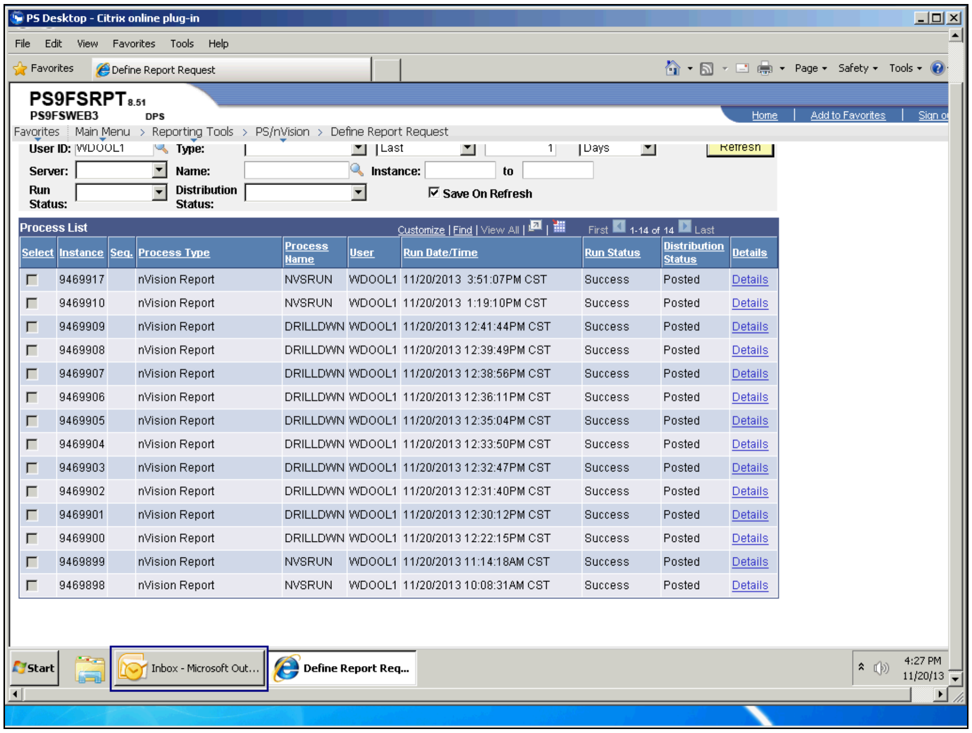


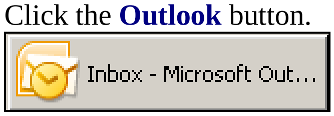
Step	Action
10.	The Format will automatically change to XLS, and a new link called Distribution displays when the Type Email is selected. Click the **Distribution** link. 
11.	Enter the desired information into the **Email Subject** field. Enter "**TBPeriod Training Example**".
12.	Enter the desired information into the **Message Text** field. Enter "**Please review.**".

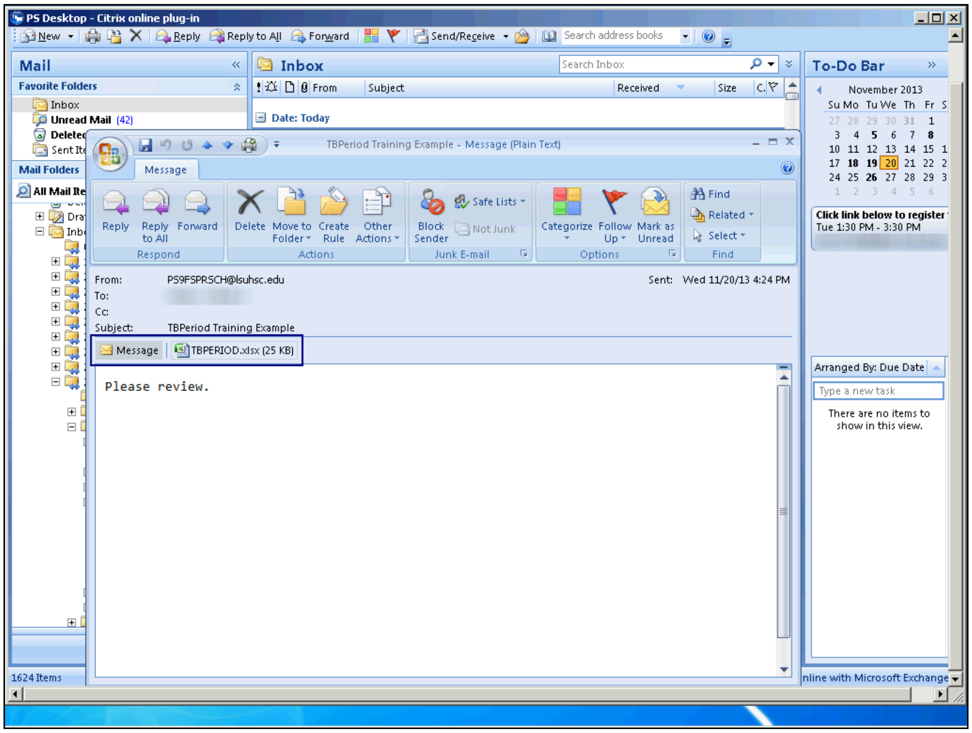
Step	Action
13.	Enter the desired information into the field. Enter "**xxxxx@lsuhsc.edu, xxxxxx@lsuhsc.edu**".

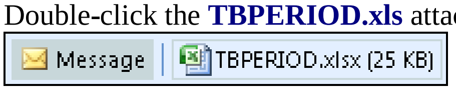


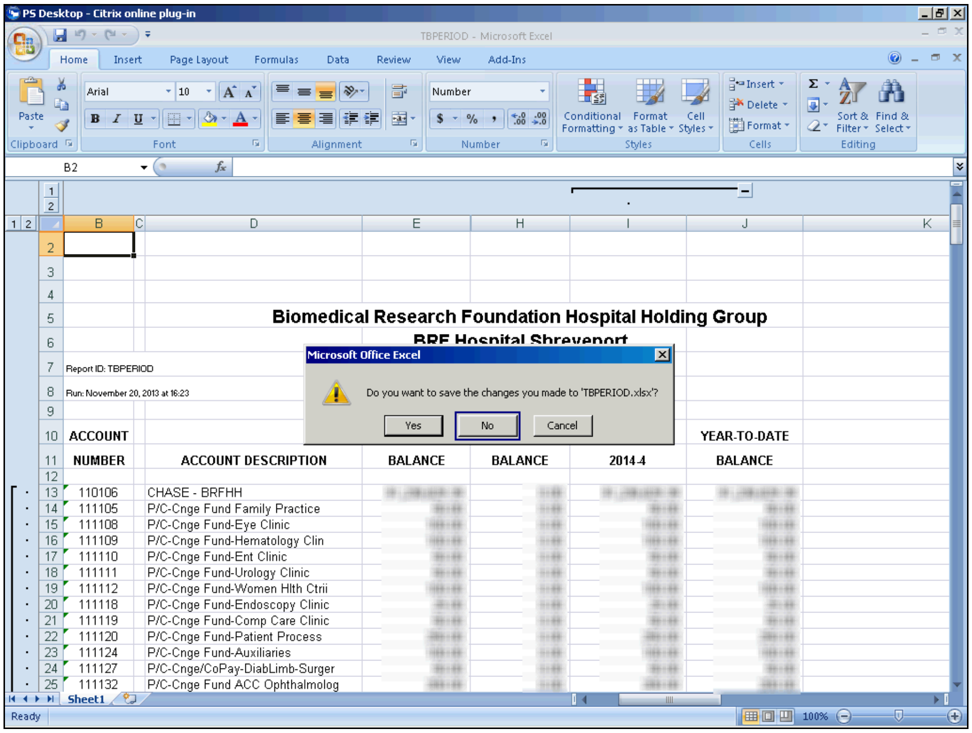
Step	Action
14.	***NOTE: The email feature is a great tool. However, it does not allow the sender to "preview" the report output before sending it to the recipient.*** Click the **OK** button. OK
15.	Click the **OK** button. OK
16.	Click the **Process Monitor** link. Process Monitor
17.	Click the Refresh button every 15 - 20 seconds until the Distribution Status is "Posted". Click the **Refresh** button. Refresh



Step	Action
18.	The report is processed and the system delivers an email to the specified users. Click the **Outlook** button. 



Step	Action
19.	Double-click the **TBPERIOD.xls** attachment. 
20.	Click the **Maximize** button. 
21.	Click the **Close** button. 



Step	Action
22.	Click the **No** button. 
23.	This completes ***Process Reports - Output type E-MAIL (User may enter text in the body of email)***. **End of Procedure.**

BRF (University Health Hospitals) Processing nVision Report (Includes Prompts)

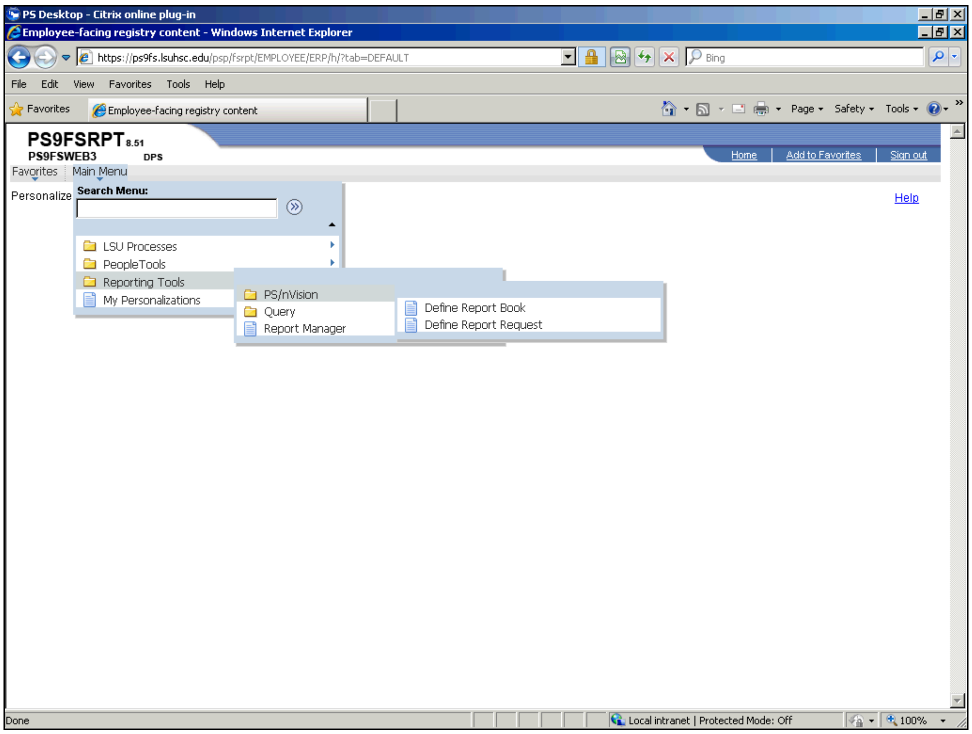
BRF (University Health Hospitals) Process Prompt Reports

Procedure

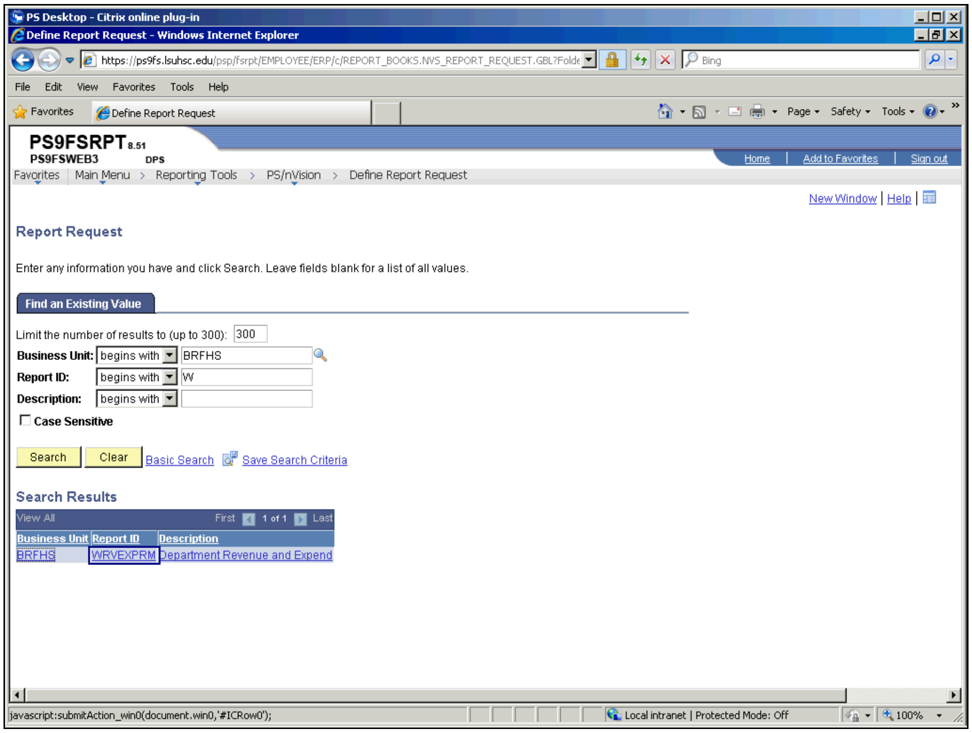
In this topic you will learn how to **Process Prompt Reports**.

Step	Action
1.	Click the **Main Menu** button. 

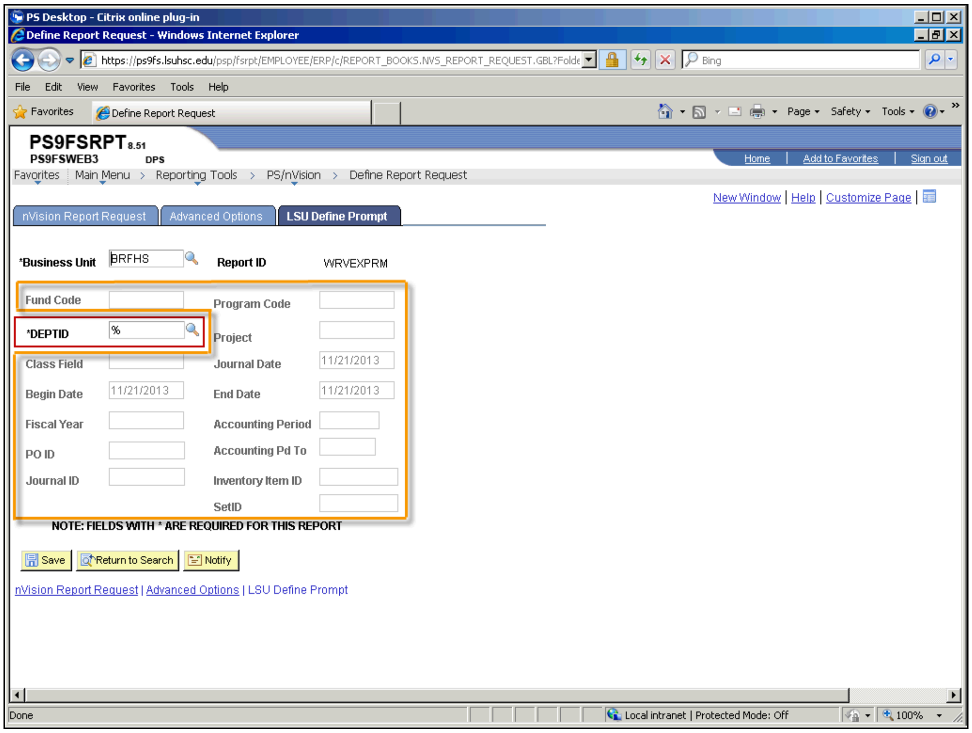
Step	Action
2.	Click the **Reporting Tools** menu. Reporting Tools
3.	Click the **PS/nVision** menu. PS/nVision



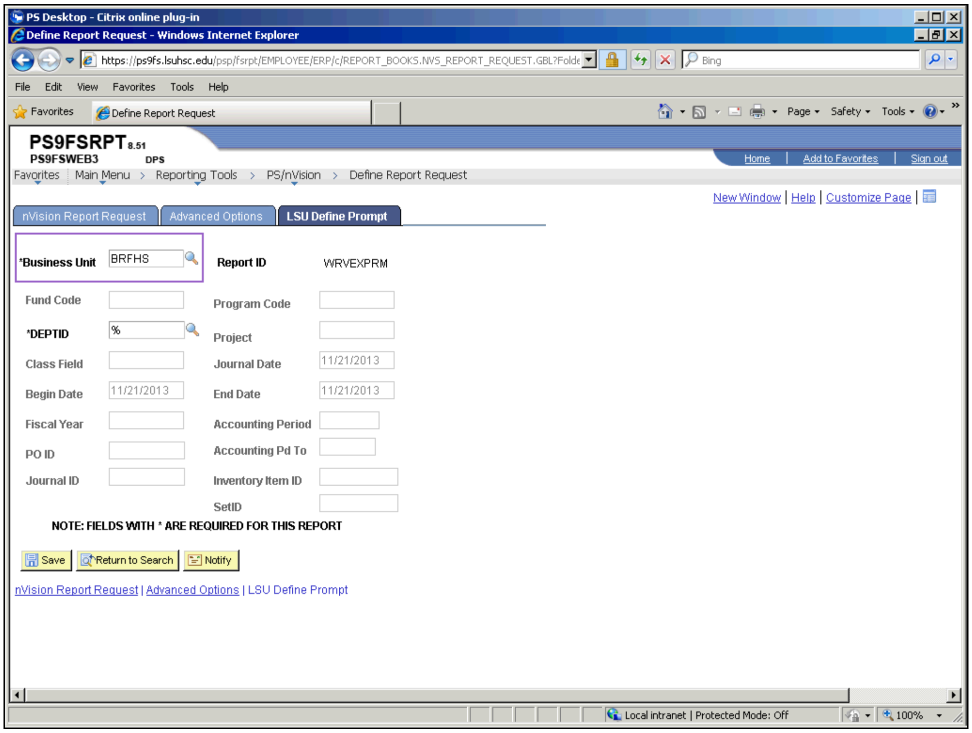
Step	Action
4.	Click the **Define Report Request** menu. Define Report Request
5.	Enter the desired information into the **Business Unit** field. Enter "**BRFHS or BRFHM**".
6.	***The Report Requests for reports that include prompts all begin with the letter "W".*** To choose a report request from the available list, enter a "W" in the Report ID field. Enter the desired information into the **Report ID** field. Enter "**W**".
7.	Click the **Search** button. Search



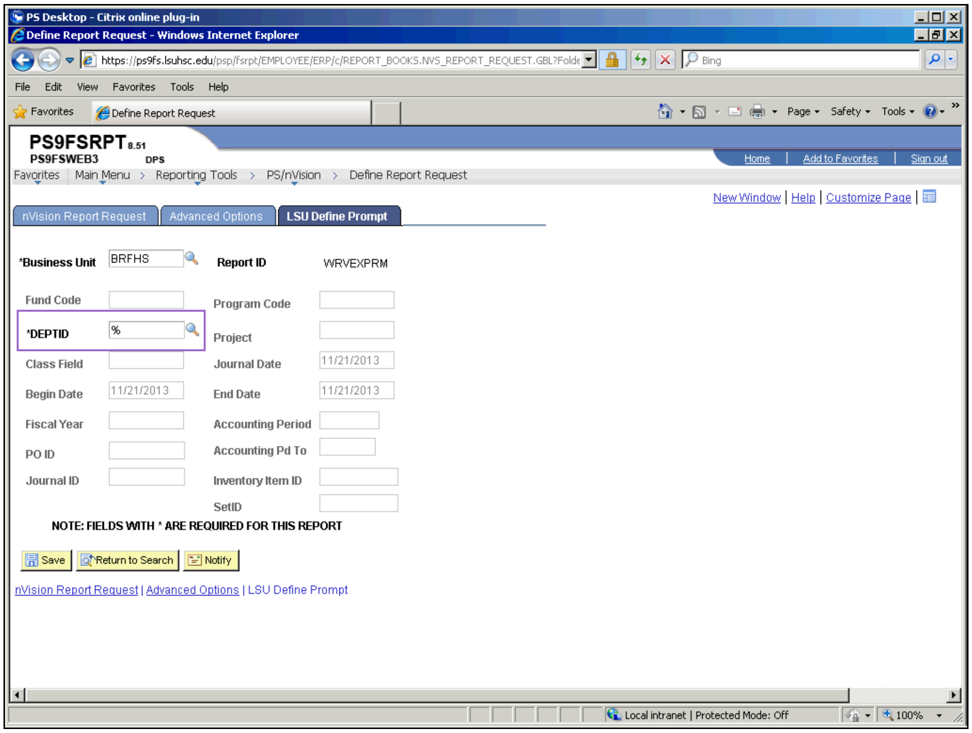
Step	Action
8.	A list of available Report Requests for the specified Business Unit displays. Scroll through the list and select the report request called WRVEXPRM. Click the **WRVEXPRM** link. WRVEXPRM
9.	Click the **LSU Define Prompt** tab. LSU Define Prompt

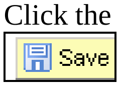


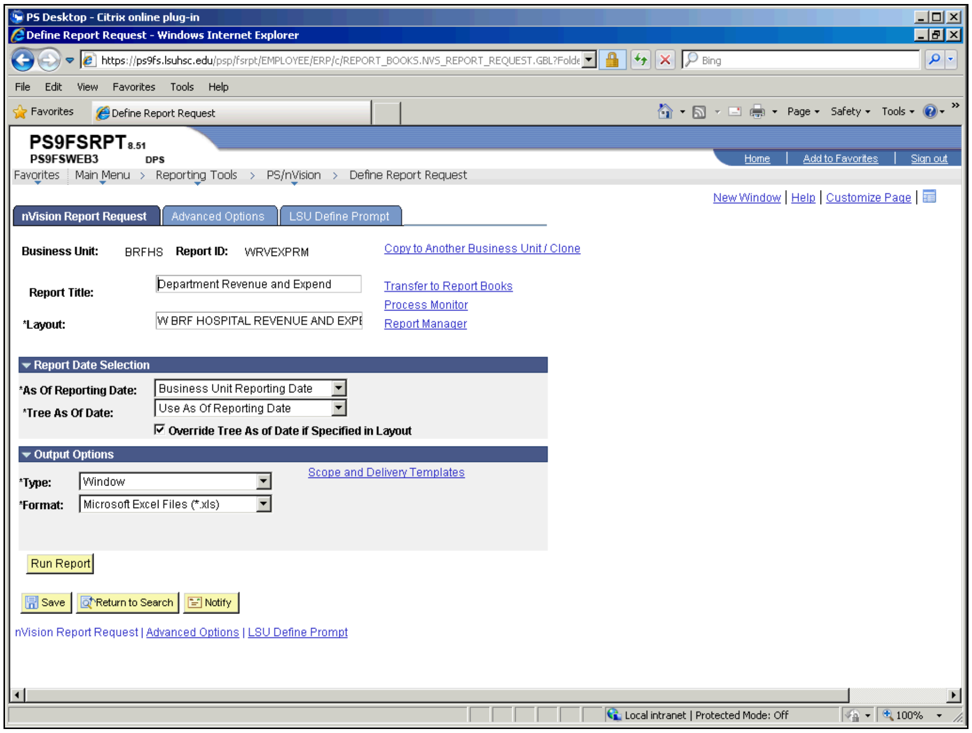
Step	Action
10.	This page is used to enter the prompt values desired to run the report. Each of the fields that appear in **bold print** are required for this particular report. The fields that appear in grey are not utilized in this case.



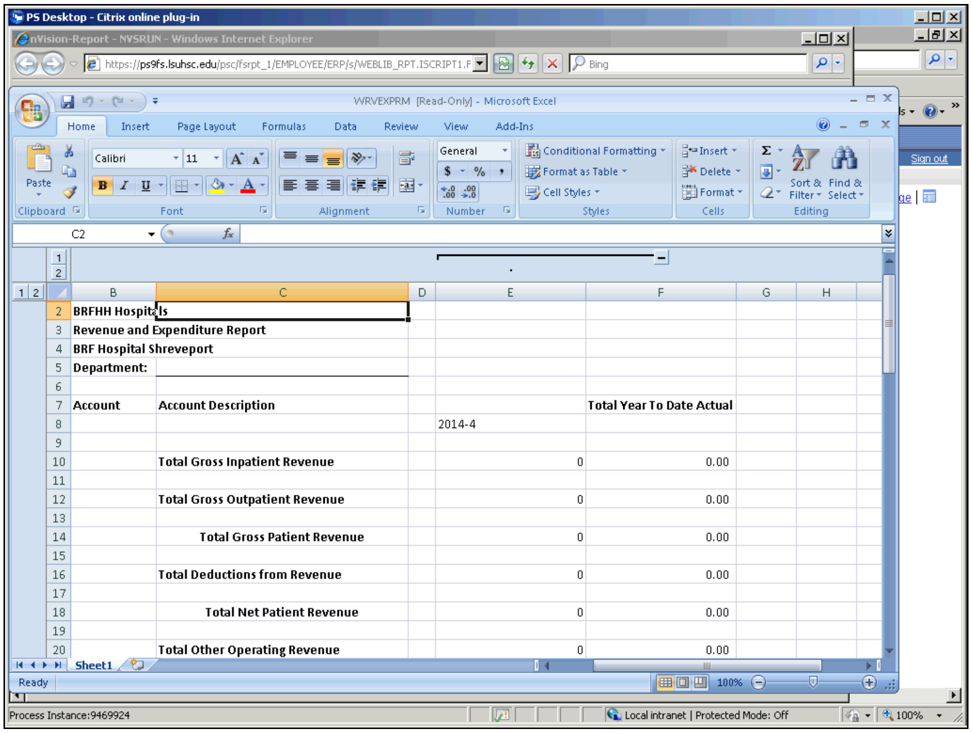
Step	Action
11.	The Business Unit is required for every report as it defaults in from the Report Request. The Business Unit may be overwritten on the LSU Define Prompts tab to request different data for a different Business Unit.



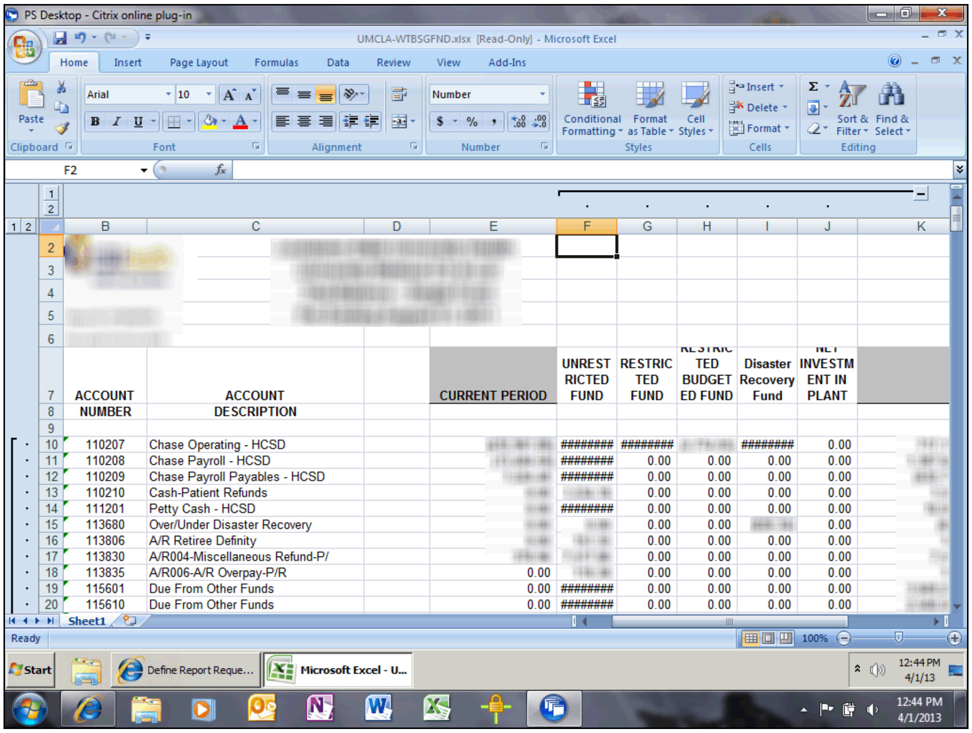
Step	Action
12.	When required in a Report Request, the chartfield values may accept wildcards or partial wildcards. The date fields, when required, must be entered in full.
13.	In this example, only the Business Unit, Report ID and DEPTID are in bold text, thus these are the only fields requiring data. No changes are needed to the Business Unit. Enter the desired information into the **DEPTID** field. Enter "**2036380**".
14.	Click the **Save** button. 
15.	Click the **nVision Report Request** tab. 



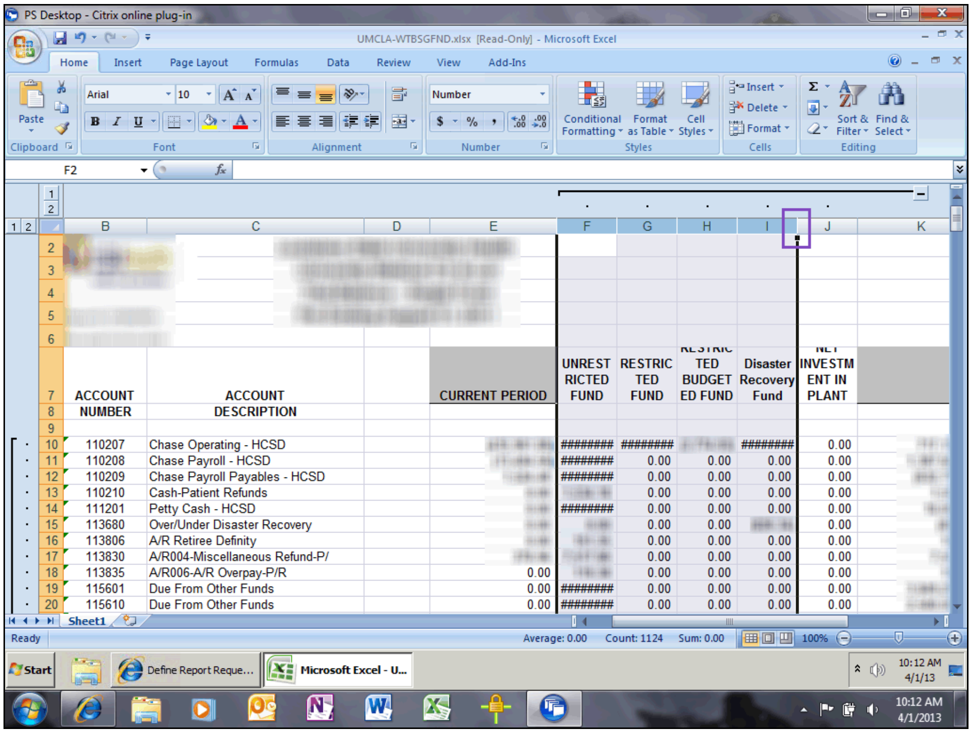
Step	Action
16.	***NOTE: The Output Type is set to Window.*** Click the **Run Report** button. Run Report
17.	Click the button to the right of the **Server Name** field.
18.	Click the **PSNT** list item. PSNT
19.	Click the **OK** button. ***NOTE: After clicking the OK button and returning to the Report Request page, the nVision Processing Window will display.*** OK

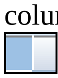
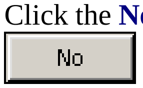


Step	Action
20.	Once the report has processed to the Success status, the Excel file opens. Click the **Maximize** button. 



Step	Action
21.	If the columns do not display all of the numbers correctly, you may adjust the column width. **Highlight** all columns affected by clicking on the column letter in this example, columns **F**, **G**, **H**, and **I**. 



Step	Action
22.	Hover the mouse at the outer end of column I. Drag the column border out until the columns are wider and the #### are replaced by the dollar amounts. 
23.	You may print, save or perform any desired drilldowns. Click the **Close** button. 
24.	Click the **No** button. 
25.	Click the **Close** button. 
26.	This completes ***Process Prompt Reports***. **End of Procedure.**

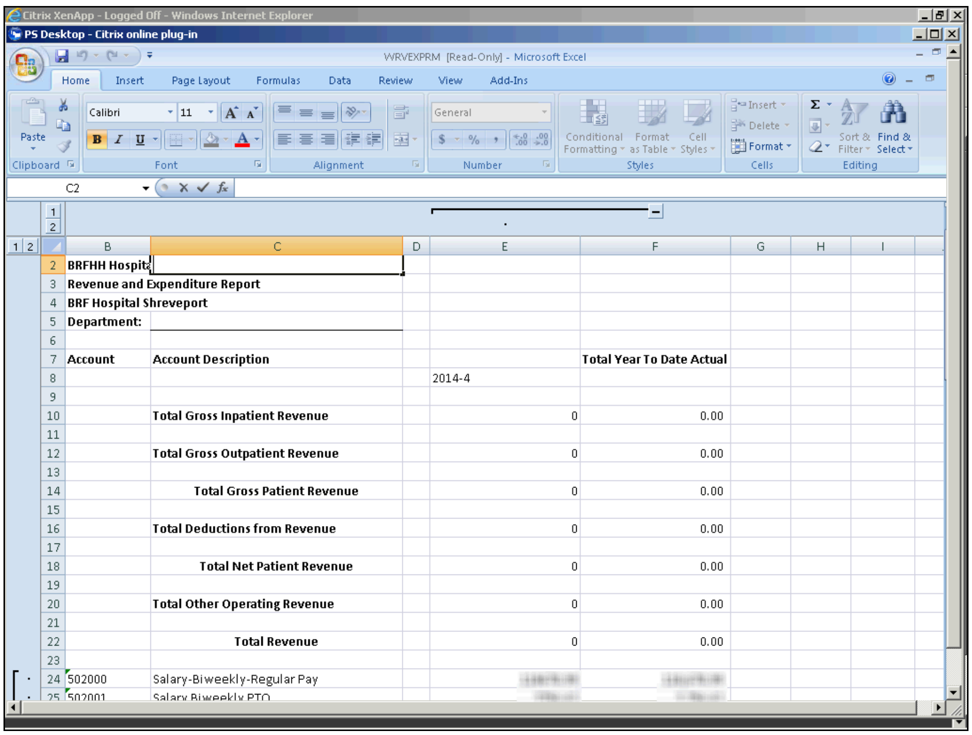
BRF (University Health Hospitals) Appendix

BRF (University Health Hospitals) Procedure for Enabling Macros

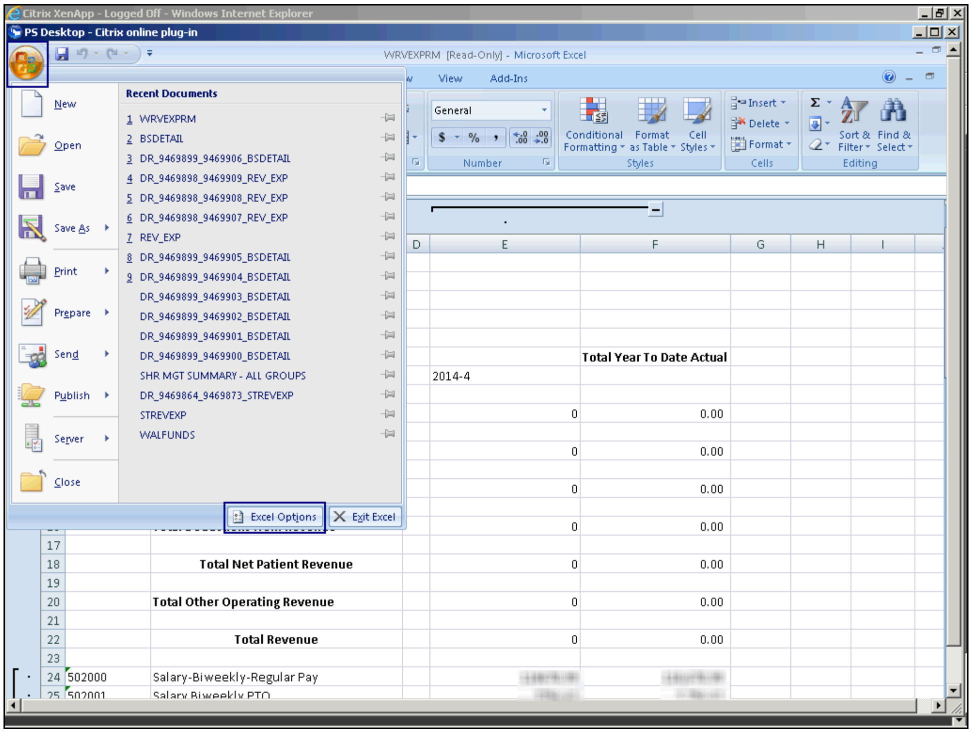
Procedure

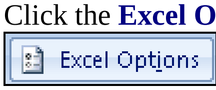
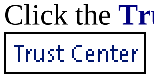
In this topic you will learn the **Procedure for Enabling Macros**.

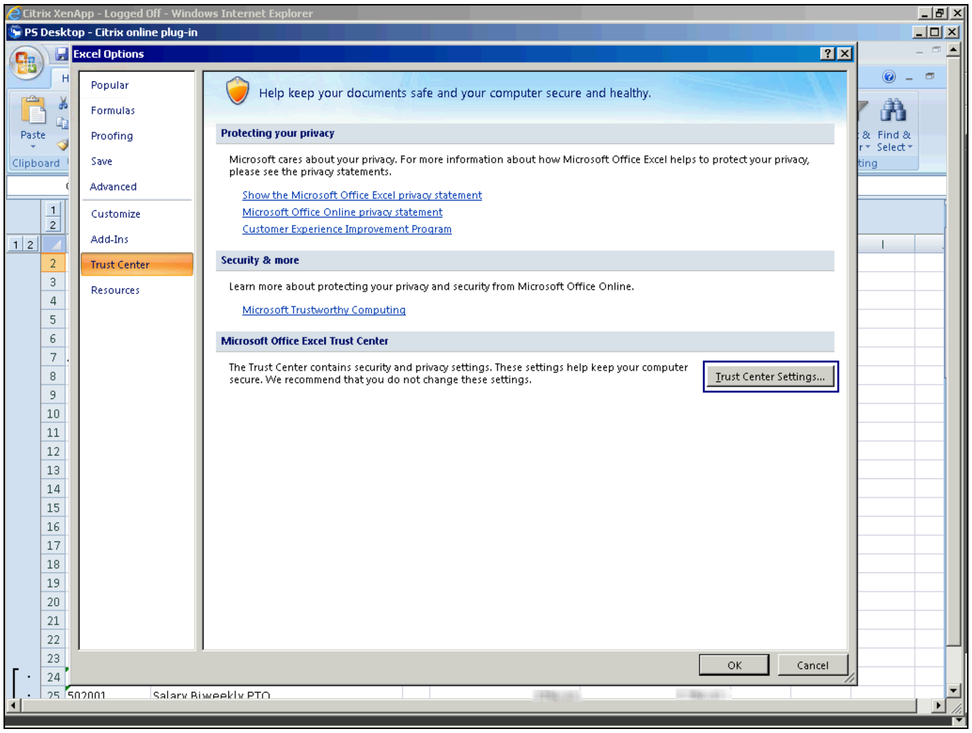
Step	Action
1.	Users may choose to enable all macros for Excel/nVision thus allowing all of the custom macros in the nVision reports to run as desired. The user must enable all macros through the Trust Center in Excel Options. Once selected, this setting is retained from PSDesktop session to session. If a user chooses not to enable all macros, the user would need to enable macros for each file containing macros. Both methods are detailed in the following steps.



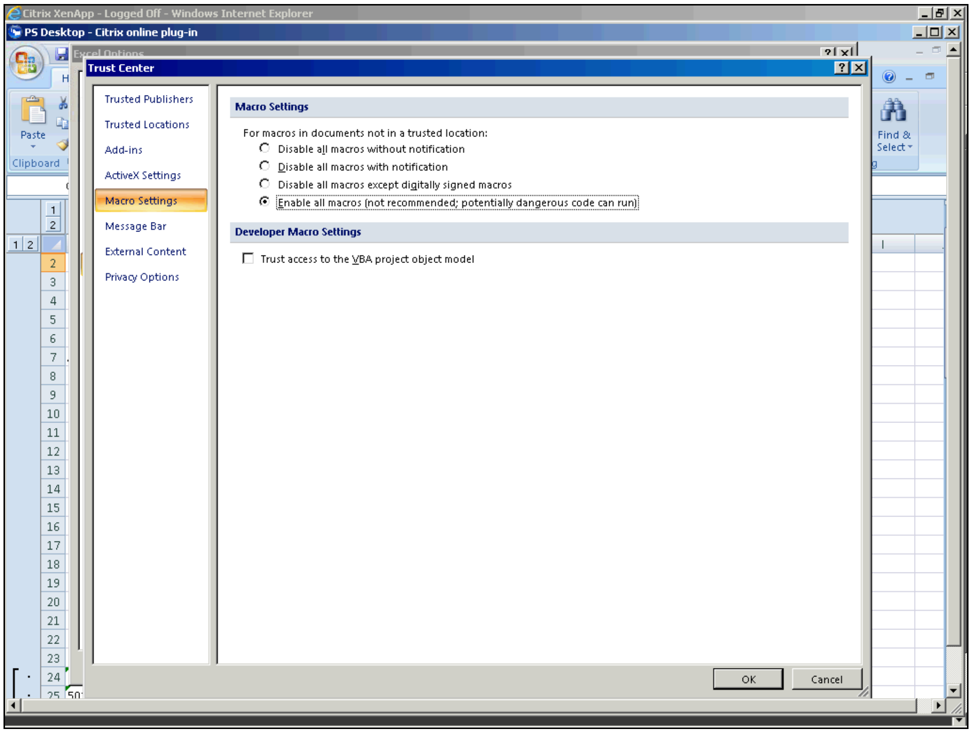
Step	Action
2.	**Enabling All Macros** Click the **Office** button. 

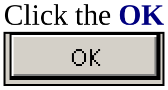


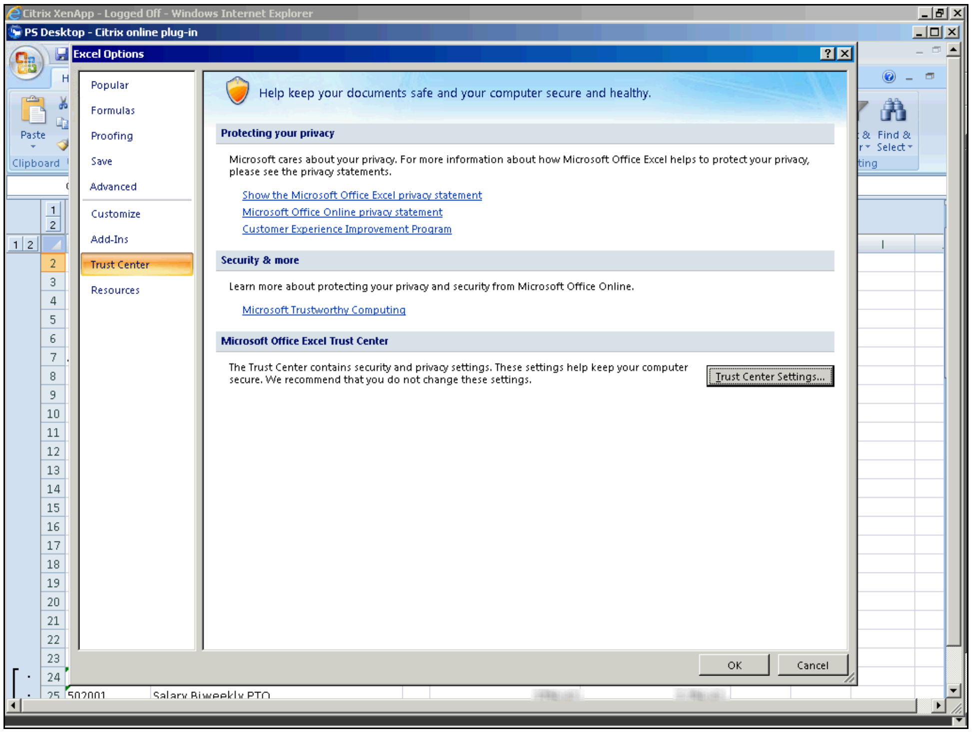
Step	Action
3.	Click the **Excel Options** button. 
4.	Click the **Trust Center** menu. 

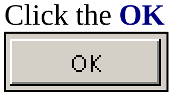


Step	Action
5.	Click the **Trust Center Settings** button. Trust Center Settings...
6.	Click the **Macros Settings** menu. Macro Settings
7.	Click the **Enable all macros (not recommended; potentially dangerous code can run)** option. 



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8.</td><td>Click the OK button.

</td></tr>
</table>



Step	Action
9.	Click the **OK** button on the Trust Center page. 
10.	The settings will now be retained from session to session.
11.	This completes ***Procedure for Enabling Macros***. **End of Procedure.**