

PeopleSoft 9.2 nVision Financial Reporting

(includes Advanced Topics for Experienced Users)

Financials Supply Chain Management (FSCM)

Developed for developers, analysts and system admins, PeopleSoft v9.2 nVision training quickly introduces students to the PeopleSoft application reporting leveraging nVision tool. Through scenarios, real-world experiences from implementers, and hands-on activities, students learn how to develop new and modify existing PeopleSoft nVision reports.

- Note: *Activity/Exercises are italics*. **Advanced topics are bolded and included on page 2 of this agenda.**

Prerequisites:

- PeopleSoft General Ledger – ChartFields, Ledger, Trees, GL Building Blocks

nVision Basics

- PeopleSoft Concepts (*activity 1*)
- nVision Components
- Develop Matrix Layout
- Report Request – Basic (*activity 2 & 2a*)
- NVUSER

Variables and Labels

- Variables – Basic (*activity 3*)
- **Variables – Advanced (*activity 4*)**
- Labels (*activity 5*)

nPlosion

- nPlosion of Detail Balances (*activity 6 & 6a*)
- Best Practices for nPlosion

Miscellaneous nVision Options

- Options Review
- Summary Ledgers
- Using Query with Matrix Reports
- Specifying Query in a Layout
- Running the Report Request
- Pivot Tables with nVision

Scopes

- Understanding Scope
- Defining Scope
- Scope Related Variables
- Scopes with Multiple Fields (*activity 7*)

Report Request – Advanced

- **Report Request – Advanced**

Drilldown

- Drilldown Options
- Using Web Drilldown

Web-based nVision

- Report Request – Web

Report Books

- nVision Report Books

Tabular Layouts

- Understanding Tabular Layouts (*activity 8*)
- Defining Tabular Layouts

Final Exercises Checkpoint

- Basic nVision Report Checklist & Activity
- Advanced nVision Report Checklist & Activity

Macros and Instance Hook

- Report restructuring
- Results put in multiple files or worksheets in the same workbook
- Highlight values needing attention
- Send emails based on the data
- Auto filters, charts, pivot tables, and subtotals.
- Hide data or insert new data
- NvsInstanceHook

Style Sheets

- Delivered Style Sheets
- Applying Style Sheets to Report Layout
- nPlosion Styles
- Using the Style Sheet Wizard
- Modifying Styles with Excel Menu Bar

Performance Tuning

- Ledger analysis and indexing LEDGER, LEDGER_BUDG
- PSTREESELECT
- Show Report SQL and Selector Numbers
- Performance Options and DBMS

Advanced Discussion Topics

- Multiple (Double) Chart-field nPlosion
- Multiple matrix-sheets on single layout

nVision Best Practices

Establishing a Reporting Center of Excellence