

# Functional Course

## **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