



# 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