The non-web (three-tier) access to the PeopleSoft Reporting database is no longer required, eliminating the need for the desktop icon. You can now access the PeopleSoft Reporting database via the web.

Links to the site can be found at: [http://www.ualberta.ca/AIS/](http://www.ualberta.ca/AIS/). Select the **Financials Reporting** link to launch PeopleSoft Financials Reporting database. (This will launch the PeopleSoft sign on page).

Alternatively, create a Favorite in your internet browser to: [https://www.prodps.ualberta.ca/psp/finrep/?cmd=login](https://www.prodps.ualberta.ca/psp/finrep/?cmd=login)

Help Desks:
- For PeopleSoft Help, contact the IBM HelpDesk at 401-9702 (option 2) or by email at uofahelp@ca.ibm.com
- For assistance with your CCID/password, contact the CNS Helpdesk at 492-9400

PeopleSoft Financials is available Monday through Saturday from 7:30 am – 11:00 pm MST.

### Navigation: Reporting Tools/PS nVision/Define Report Request

A new method of generating and retrieving nVision reports and drills is being introduced starting in March 2006, replacing the current practice of accessing monthly reports through Dangra. This Learning Summary provides instruction on how to use the PeopleSoft Financials Reporting database to generate nVision reports and perform reporting drills.

nVision reports may be located by the nVision Report Request Description. The description field will include an identifier for the department, report template and the chartfield combination.

**Example:**

1001000_FSGLV12_FP_DD
DeptID - Report template - Chartfield combination

The **As of Reporting Date** can reflect any past date as desired. Ensure the **Tree As of Date** reflects the first day in the current fiscal year.

To generate a report in Excel to the screen, leave the defaults as:

- **Type** – Web
- **Format** - Microsoft Excel files

Click **Run Report**

To generate a report, do not change the defaults.

Click **OK**
PeopleSoft Financials Reporting - Web nVision Learning Summary

The nVision Report Request screen appears next. (Optional: Click Process Monitor to determine the Run Status. The report will not appear in the Report Manager until the Run Status is Success.)

Click Report Manager to access the report.

Alternate navigation from the left navigation menu:
- Process Monitor: PeopleTools/Process Scheduler/Process Monitor
- Report Manager: Reporting Tools/Report Manager

Click the blue, underlined link for the related report.

Report Manager will retain copies of reports previously generated. The most recent report is viewed at the top of the list.

Click the blue, underlined link to retrieve the report in Excel.

A dialog box appears. Click Open to open the file in Excel.

For some reports such as the FSGLV14 report, a Macros screen will appear. Click on the Enable Macros button to activate report macros (e.g. filtering options).

To drill, the nVision report needs to be open and the cursor in a cell with a value, not a formula or text.

- With the Window option, the report status is displayed on the screen.
- With the Web option, the drill report is diverted to Report Manager. Drill reports are prefixed with "DR."

Scroll down to see the complete list of available drills. Select the Drilldown from the list of options.