How to run nVision reports in PeopleSoft: Excel, styling, and web (PIA)

This guide shows you how to run nVision reports in PeopleSoft from Excel and from the PeopleSoft Internet Architecture (PIA) web interface. You open a layout and report request, run the report, and apply a custom cell style to the output. You then transfer layout files to the server, run the report on the web, and retrieve the result.

Prerequisites

Before you begin, make sure you have the following:

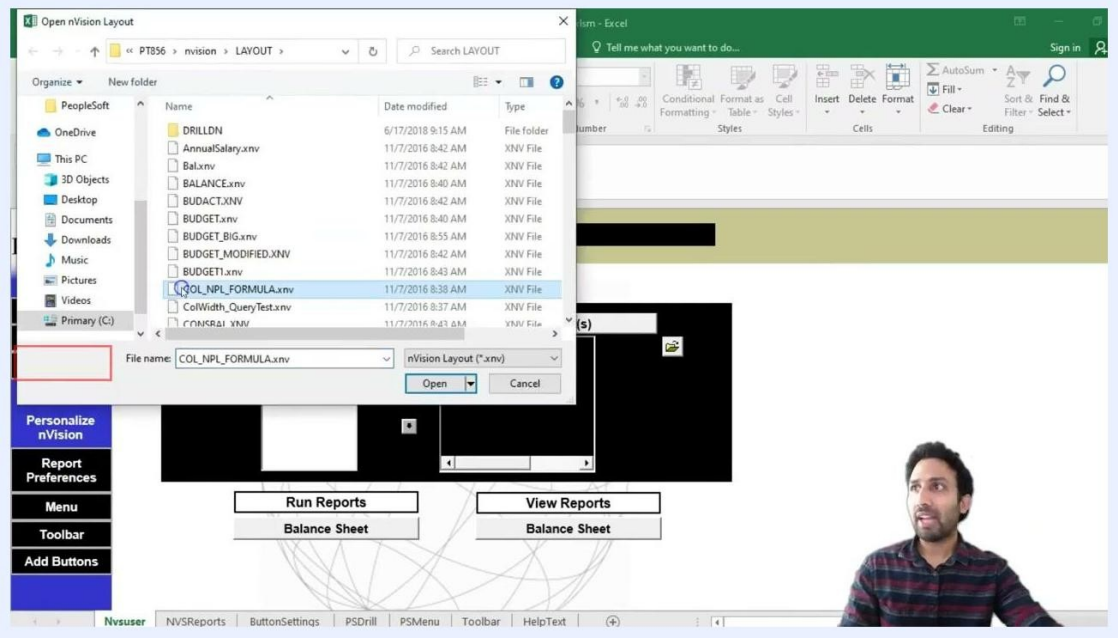
- Microsoft Excel with the PeopleSoft nVision add-in.
- The layout file demo_nPlosion.xnv on your local machine.
- A PeopleSoft user ID and password for signing in to PIA.
- An SFTP client such as WinSCP, and credentials for the PeopleSoft server.
- Access to the PeopleSoft client directory C:\PT856\bin\client\winx86 on your local machine.

Run an nVision report from Excel

Step 1: Open the nVision report layout

1. Launch Microsoft Excel.
2. Go to the PeopleSoft nVision add-in interface.
3. Click **Open Layout** in the nVision Actions menu.
4. In the file dialog, select the layout file demo_nPlosion.xnv.

5. Click **Open** to load the layout.

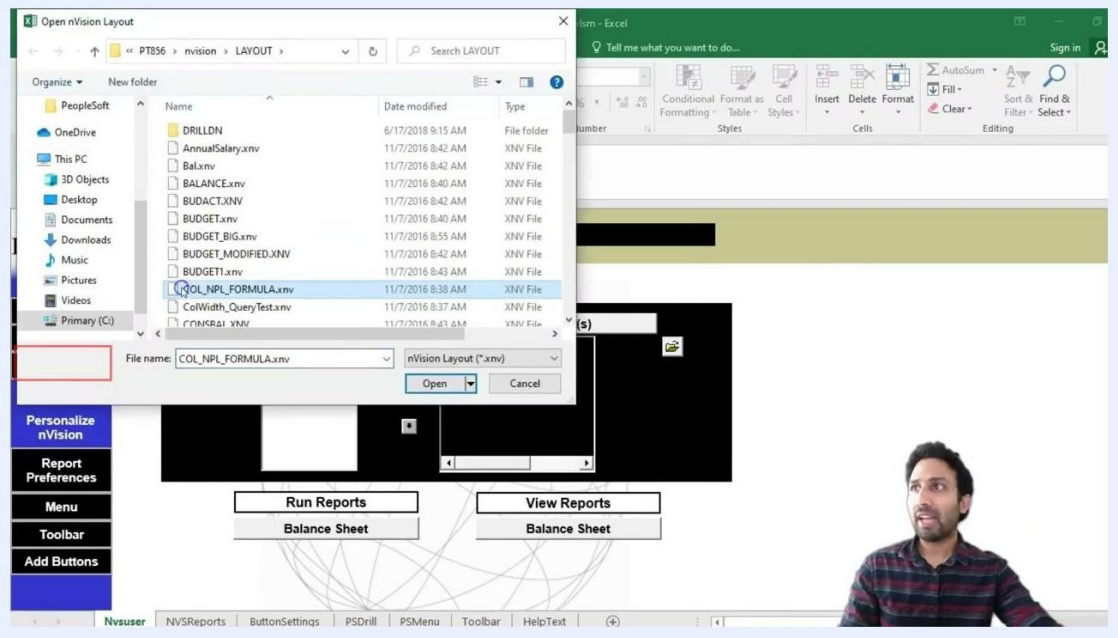


The Excel window with the PeopleSoft nVision home page and the Open Layout dialog listing layout files.

Step 2: Open the report request

1. Go to the **Add-ins** tab in Excel.
2. Select **Report Request** from the nVision menu.
3. In the PeopleSoft nVision Report Request window, click **Open**.
4. In the Open Report Request dialog, enter US001 for **Business Unit** and DEMO_N1 for **Report Name**.
5. Click **Get List** to retrieve the available report requests.

6. Select your report request from the list, and then click **OK** to load it.



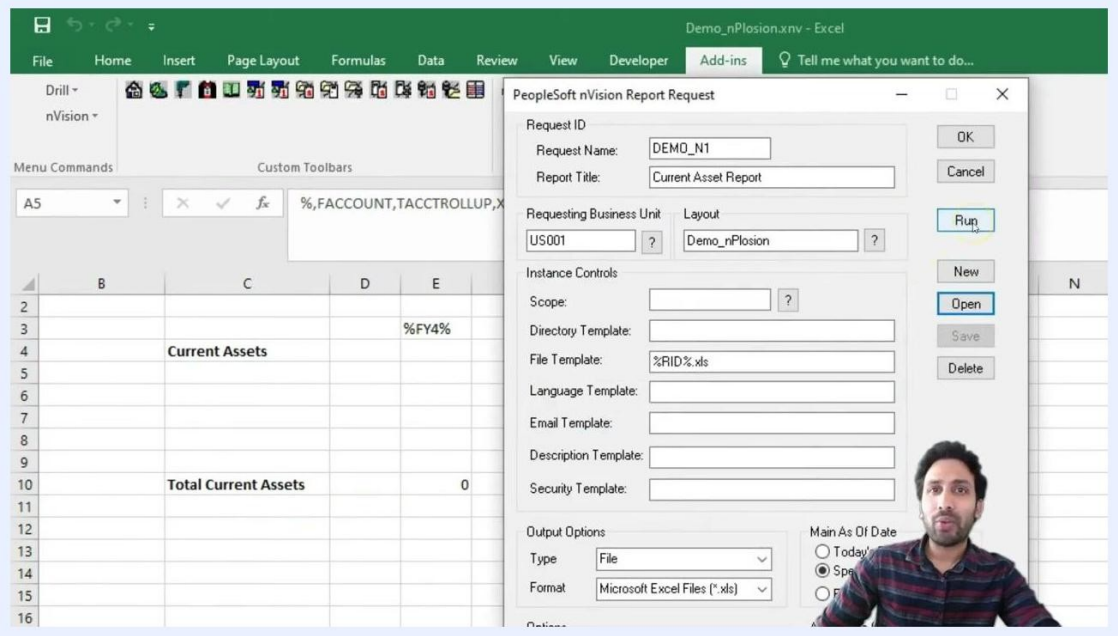
The Open Report Request dialog with Business Unit US001, Report Name DEMO_N1, and the Get List button highlighted.

Step 3: Run the report

In the PeopleSoft nVision Report Request window, confirm the following values:

- **Request Name:** DEMO_N1
- **Report Title:** Current Asset Report
- **Requesting Business Unit:** US001
- **Layout:** Demo_nPlosion

Click **Run** to generate the report output.



The PeopleSoft nVision Report Request dialog showing Request Name DEMO_N1, Report Title Current Asset Report, and the Run button highlighted.

Create and apply a custom cell style

Next, you improve the appearance of the report by adding a new style and colors to the rows. You create the style in Microsoft Excel and then point nVision to it.

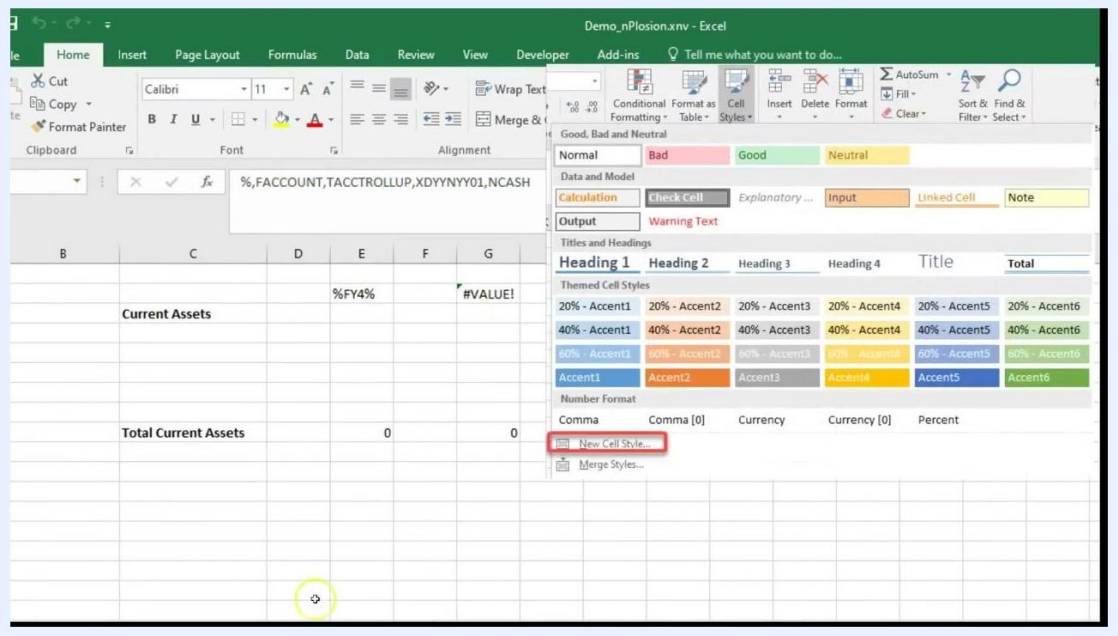
Step 4: Go to the Home tab

1. Make sure your nVision report layout is open in Excel.
2. Click the **Home** tab in the Excel ribbon.

Step 5: Open the Cell Styles menu

1. In the Styles group on the **Home** tab, locate **Cell Styles**.
2. Click the small dropdown arrow on the right side of the **Cell Styles** button to expand the menu.

3. At the bottom of the menu, click **New Cell Style...**.



The Excel Home tab with the Cell Styles dropdown expanded and the New Cell Style option highlighted.

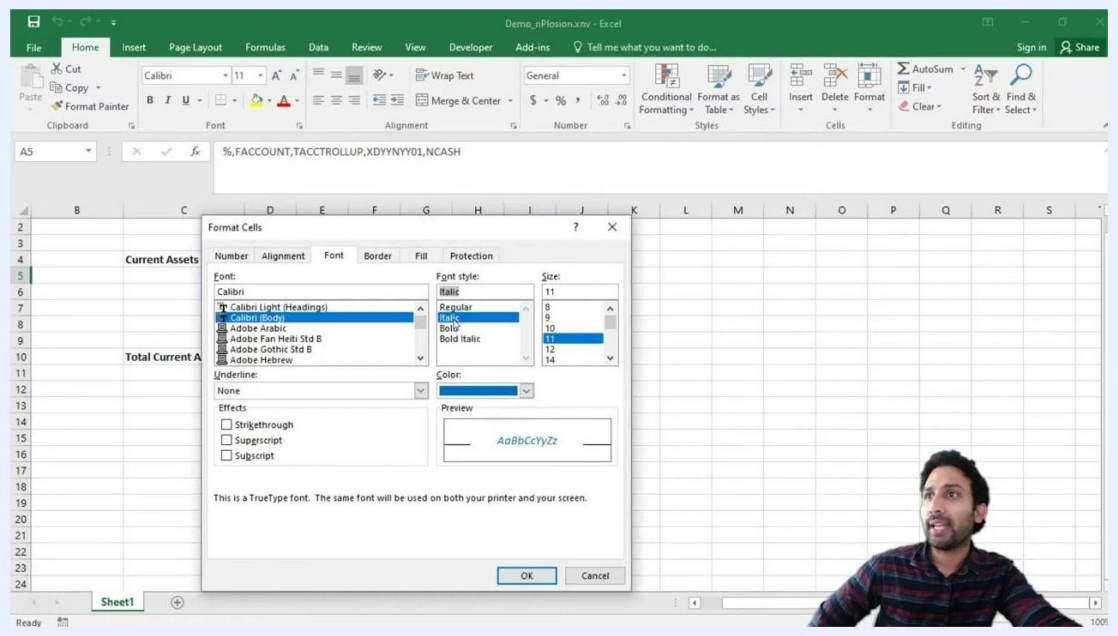
Step 6: Name the new style

In the Style dialog box, enter the style name Demo_Style1.

Step 7: Format the new style

1. In the Style dialog, click **Format...**.
2. In the Format Cells window, go to the **Font** tab.
3. Change the font color to **blue**.
4. Change the font style to **Italic**.

You can also adjust settings such as borders, background color, or alignment. This example changes only the font color and style.

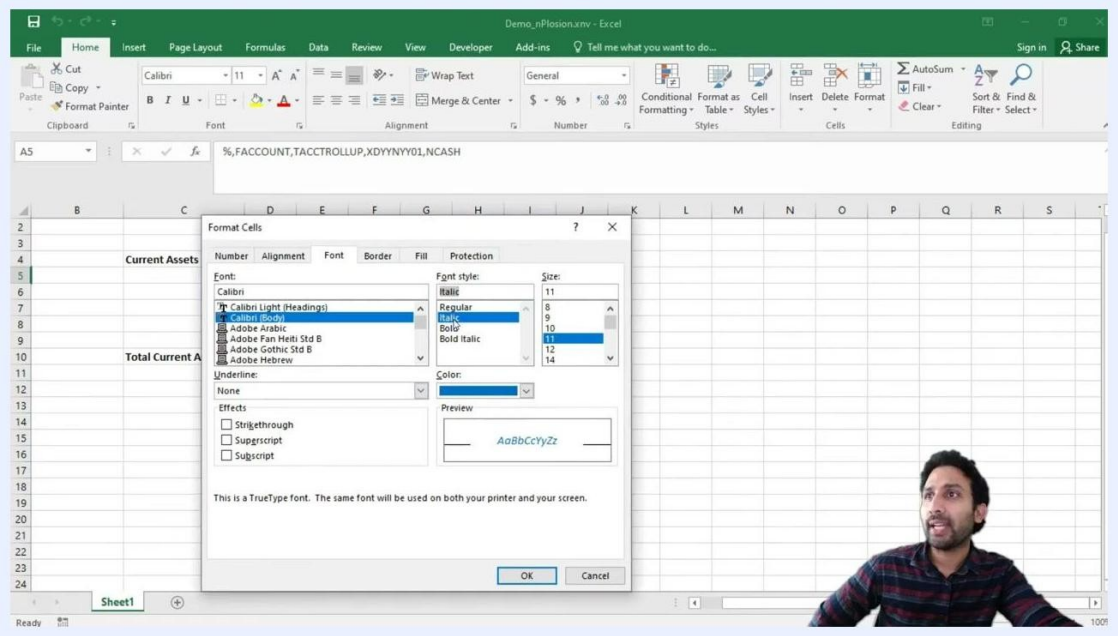


The Format Cells dialog on the Font tab with Calibri (Body), Italic, Size 11, and a blue font color.

Step 8: Confirm and save the style

1. Click **OK** in the Format Cells window to apply your formatting choices.
2. Click **OK** in the Style dialog to save the new style.

3. Remember the style name Demo_Style1, because you use it in the next steps.



An Excel worksheet with a reminder to remember the style name.

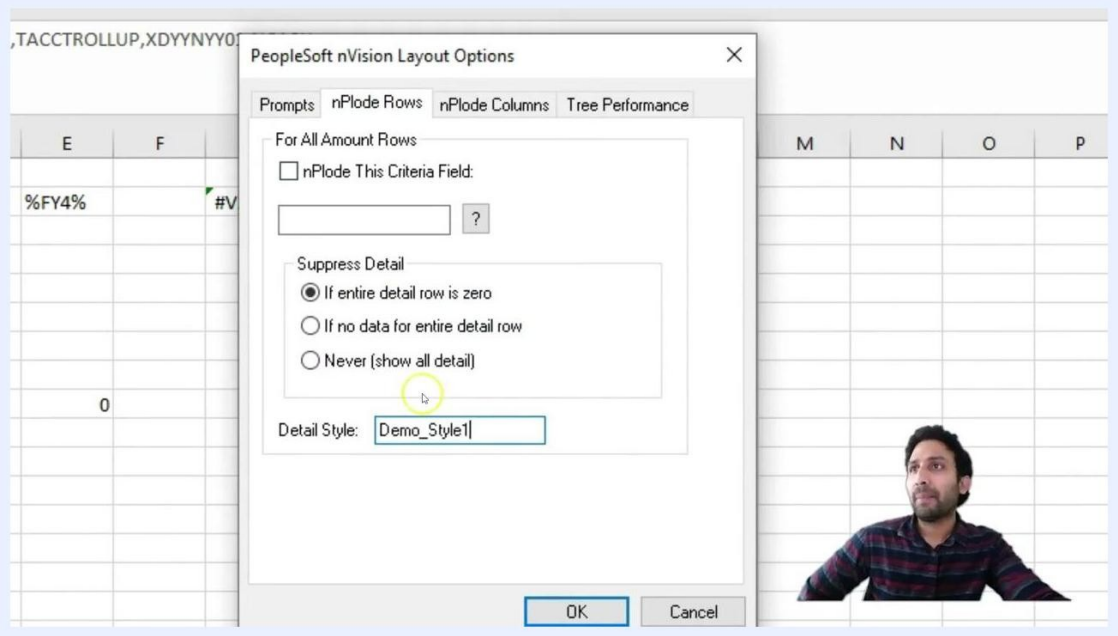
Step 9: Save the layout

Save your Excel layout so the new style is available to nVision.

Step 10: Apply the style to uploaded rows

1. Go to the **Add-ins** tab in Excel.
2. Select **nVision Layout Options** from the nVision menu.
3. In the PeopleSoft nVision Layout Options dialog, open the **nPlode Rows** tab.
4. In the **Detail Style** field, enter Demo_Style1.

5. Click **OK** to apply the style to your uploaded rows.



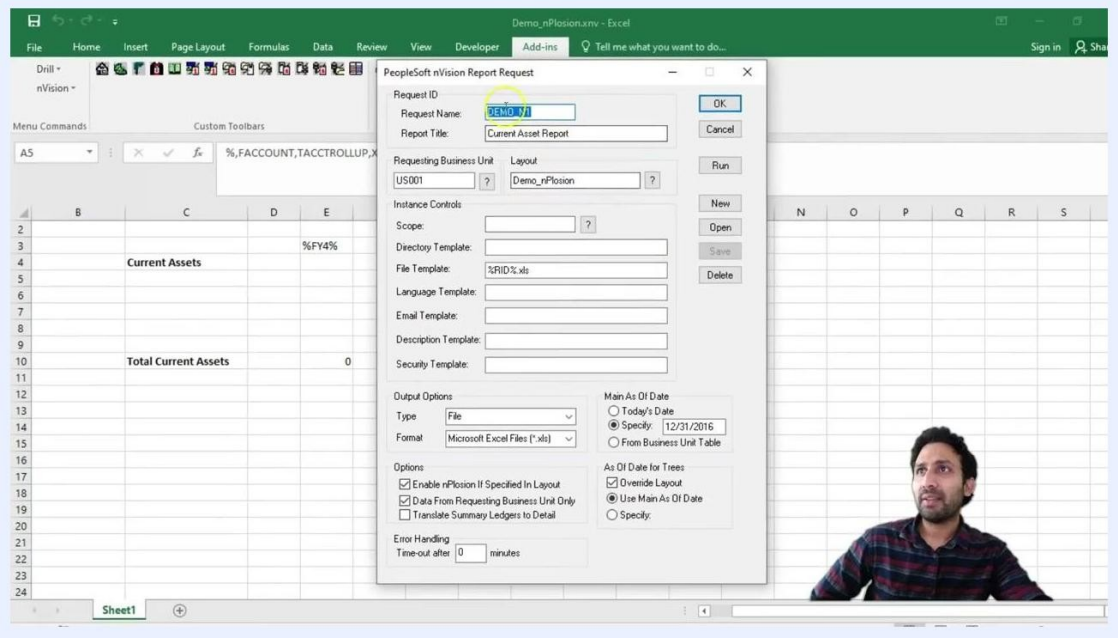
The PeopleSoft nVision Layout Options dialog on the nPlode Rows tab with the Detail Style field set to Demo_Style1.

Step 11: Specify a style for uploaded columns (optional)

If your nVision layout has uploaded columns, you can style them the same way.

1. In the PeopleSoft nVision Layout Options dialog, open the **nPlode Columns** section.
2. Enter the style name in the **Detail Style** field for columns as needed.

3. Click **OK** to confirm your settings.



The PeopleSoft nVision Layout Options dialog on the nPlode Columns tab with the Detail Style field available for column styling.

Step 12: Save the layout again

Save your Excel layout so all style settings are kept for future report runs.

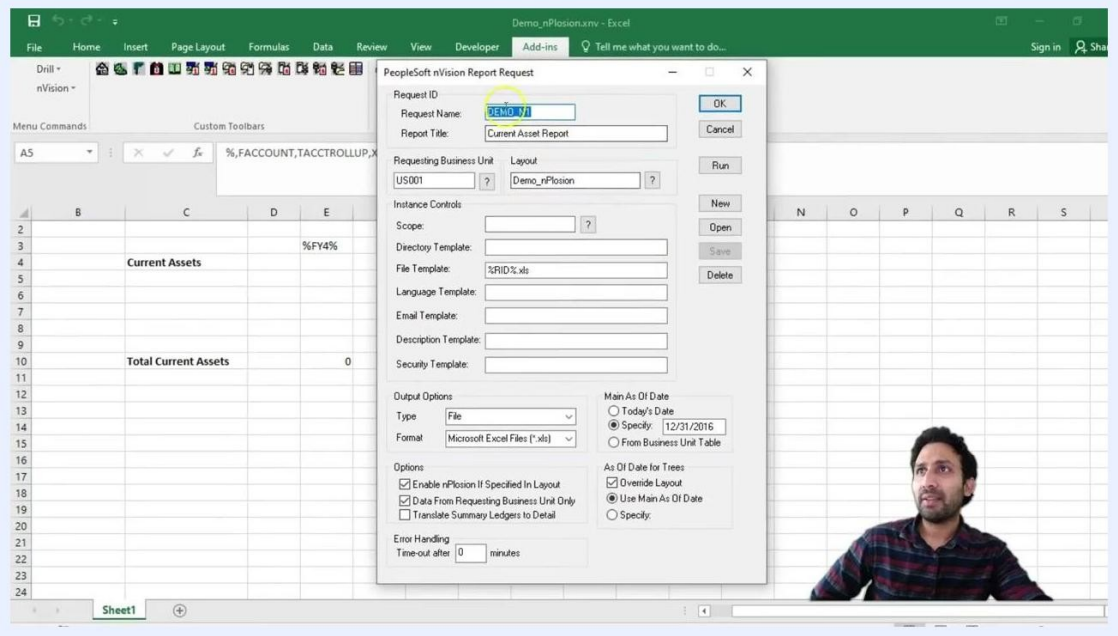
Step 13: Run the nVision report in Excel

1. Open the **PeopleSoft nVision Report Request** dialog.
2. Confirm the following fields:

    - **Request Name:** DEMO_N1
    - **Report Title:** Current Asset Report
    - **Requesting Business Unit:** US001
    - **Layout:** Demo_nPlosion
    - **File Template:** %RID%.xls
    - **Format:** Microsoft Excel Files (*.xls)
    - **Main As Of Date:** 12/31/2016

3. Make sure all other options are set as your report requires.

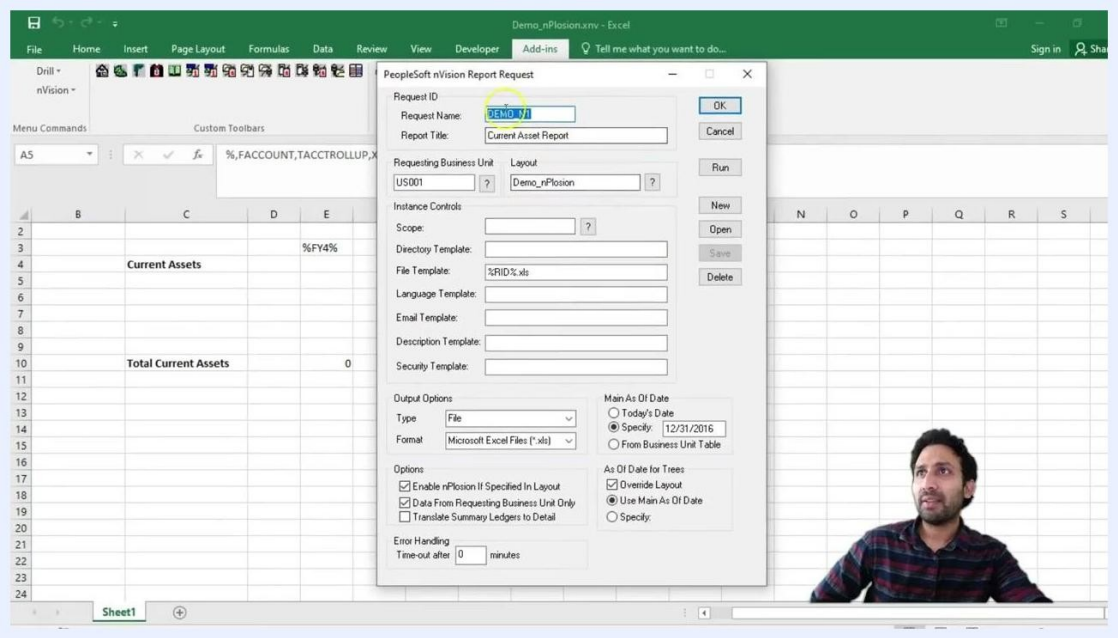
4. Click **Run** to execute the report.



The PeopleSoft nVision Report Request dialog with all fields populated and the Run button highlighted.

Step 14: Verify the style in the output report

Review the generated Excel report to confirm that Demo_Style1 is applied to the appropriate rows and columns. The detail rows show blue, italicized text, as defined in your custom style.

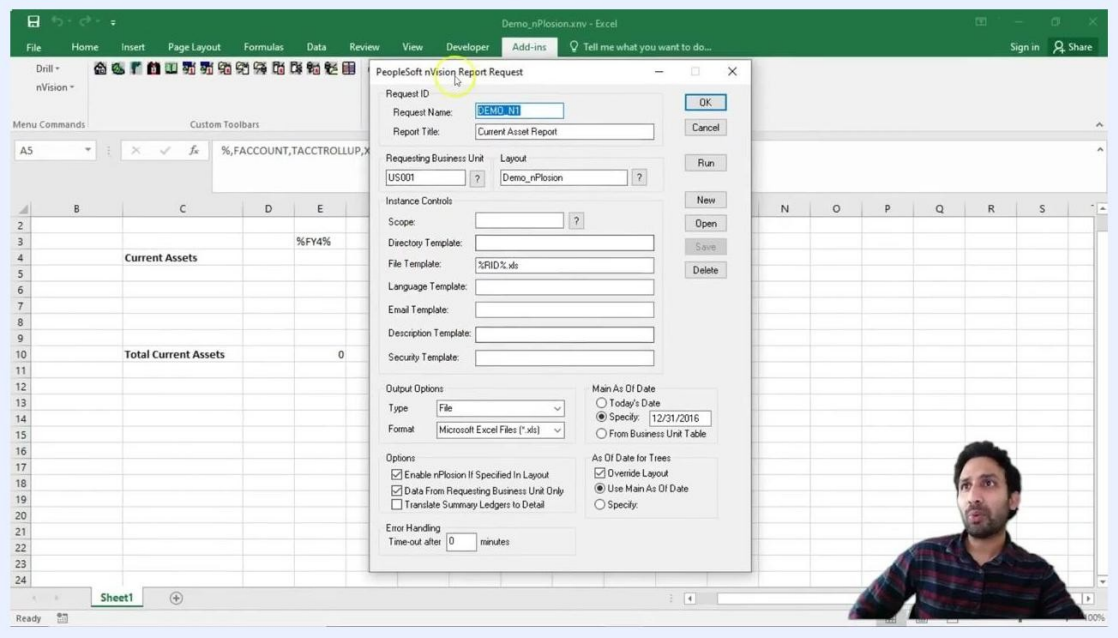


The Excel output report showing blue italicized text in the styled rows and columns.

Run nVision reports in PeopleSoft from the web interface (PIA)

Step 15: Understand report request persistence and sign in to PIA

When you save a report request in Excel, it is inserted into the PeopleSoft database. This lets you open and run the same request from the web interface (PIA). If the **Save** button is disabled, the request is already saved in the database.



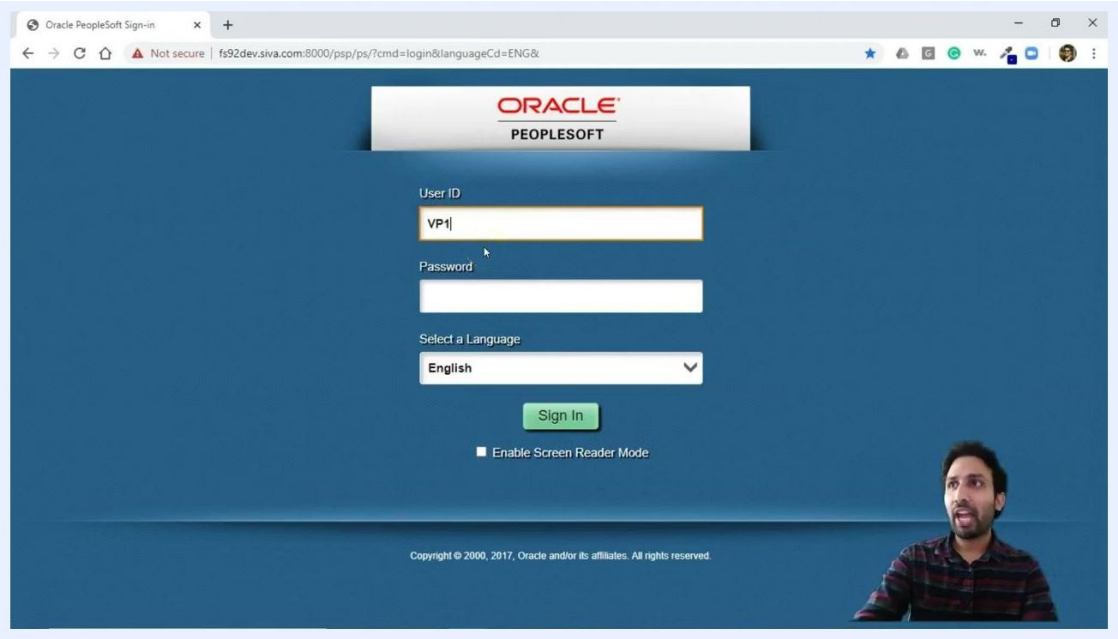
The PeopleSoft nVision Report Request dialog with the Save button disabled, showing that the request is already saved.

To sign in to PIA:

1. Open your web browser and go to the PeopleSoft PIA login page. The example URL is fs92dev.siva.com:8000/psp/ps/?cmd=login&languageCd=ENG&.
2. On the **Oracle PeopleSoft Sign-in** screen, enter your PeopleSoft user ID in **User ID** (the example uses VP1).
3. Enter your PeopleSoft password in **Password**.
4. In **Select a Language**, choose your language from the dropdown (the example uses English).

5. Optionally, select **Enable Screen Reader Mode** if you need accessibility features.
6. Click **Sign In**.

The browser address bar in this example shows "Not secure" because the connection uses HTTP, not HTTPS.



The PeopleSoft PIA sign-in screen with User ID VP1 entered, the Password field blank, and English selected.

Step 16: Open the Report Request page

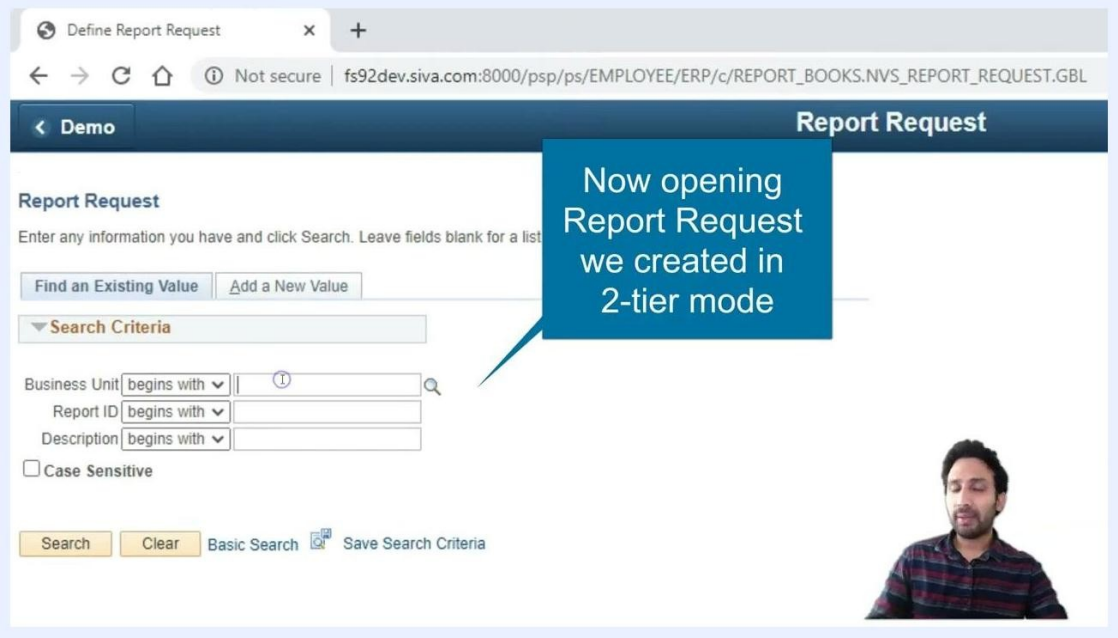
Open the **Report Request** page in your web browser. The page has two tabs: **Find an Existing Value** and **Add a New Value**.

Under **Search Criteria**, you can filter by Business Unit, Report ID, and Description. Each filter has a dropdown for the search type, such as "begins with". You can also make the search case sensitive.

Use the **Search** and **Clear** buttons to run or reset your search. The page also includes these links:

- **Basic Search**
- **Save Search Criteria**
- **Find an Existing Value**

- **Add a New Value**



The Report Request screen with search fields for Business Unit, Report ID, and Description, and the Search, Clear, and Save Search Criteria actions.

Step 17: Review the report request and set the output type

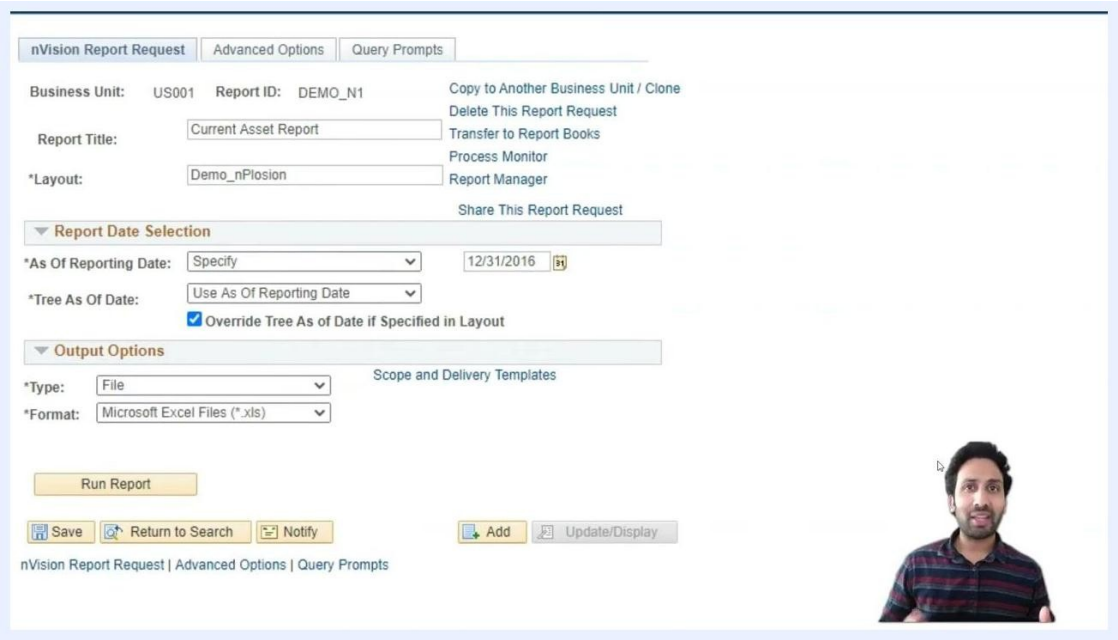
With the **nVision Report Request** tab active, review these key fields:

- **Business Unit:** US001
- **Report ID:** DEMO_N1
- **Report Title:** Current Asset Report
- **Layout:** Demo_nPlosion

Under **Report Date Selection**, the values are:

- **As Of Reporting Date:** Specify, 12/31/2016
- **Tree As Of Date:** Use As Of Reporting Date
- **Override Tree As Of Date if Specified in Layout:** selected

Under **Output Options**, the **Type** is File and the **Format** is Microsoft Excel Files (*.xls). The page includes these action buttons: Run Report, Save, Return to Search, Notify, Add, and Update/Display. It also includes these links: Scope and Delivery Templates, nVision Report Request, Advanced Options, and Query Prompts*.



The nVision Report Request screen showing the report parameters, date selection, and output options.

Set the output type according to how you run the request:

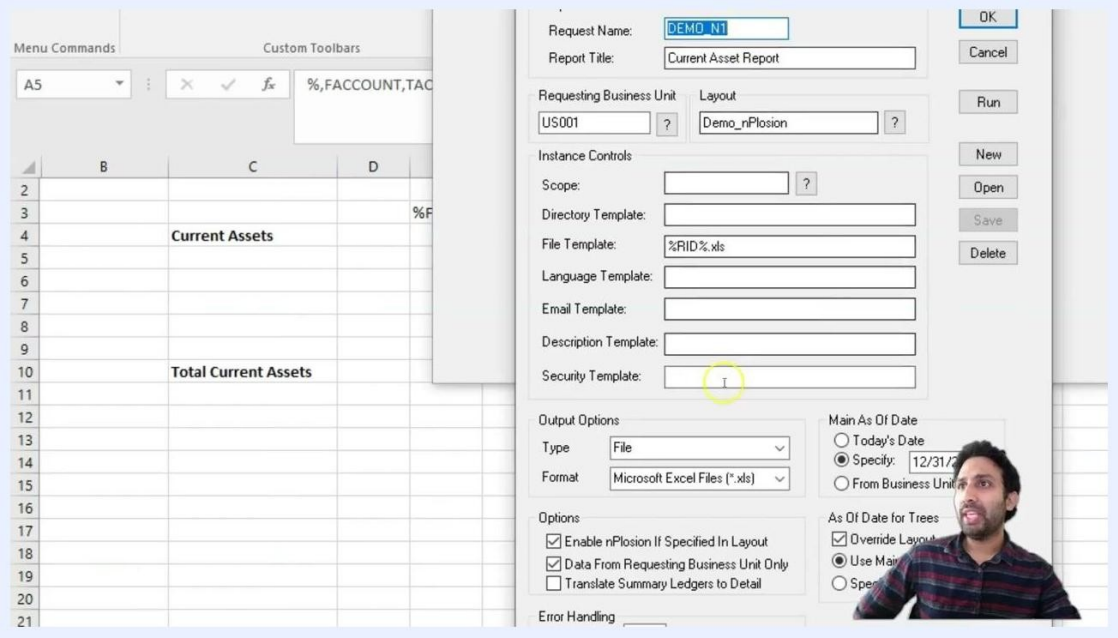
- **Two-tier mode:** When you run the report request from the two-tier client, set the output type to **File**.
- **Web interface:** When you run the same request from the web interface, always set the output type to **Web**.

If you don't set the correct output type, you may get errors or inaccessible output.

Step 18: Choose the output type and run the report

1. Click the **Type** dropdown under **Output Options**. The available options are Email, File, Printer, Web, and Window. The current selection is File.
2. In the web interface, change the **Type** from **File** to **Web**.
3. Make sure all other parameters are set as your report requires.

4. Open the report request in the interface you want (web or two-tier), and confirm the output type: File for two-tier, Web for the web interface.
5. Click **OK** to submit the report request for processing.

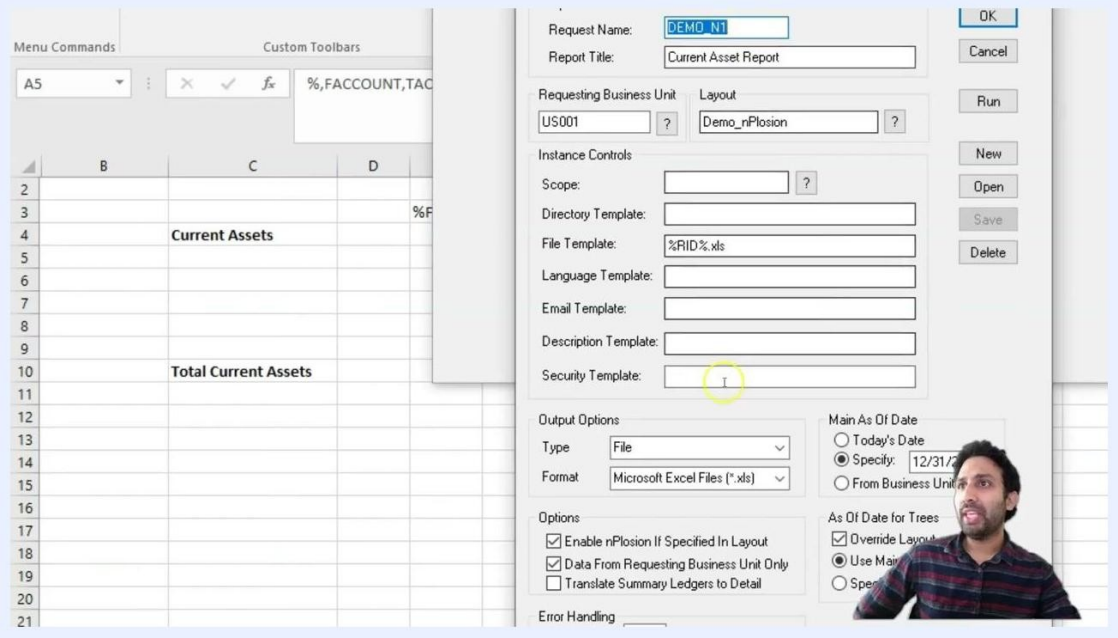


The nVision Report Request screen with the Output Options Type dropdown expanded to show Email, File, Printer, Web, and Window.

Step 19: Monitor the process

1. After you submit the report, go to the **Process Monitor** page.
2. In the Process List, find your process by Instance, Process Type (nVision Report), Process Name (NVSRUN), User (VP1), and Run Date/Time.
3. Check the **Run Status** column for the result, such as Error, Cancelled, or Success.

4. If the status is Error, click **Details** for more information.

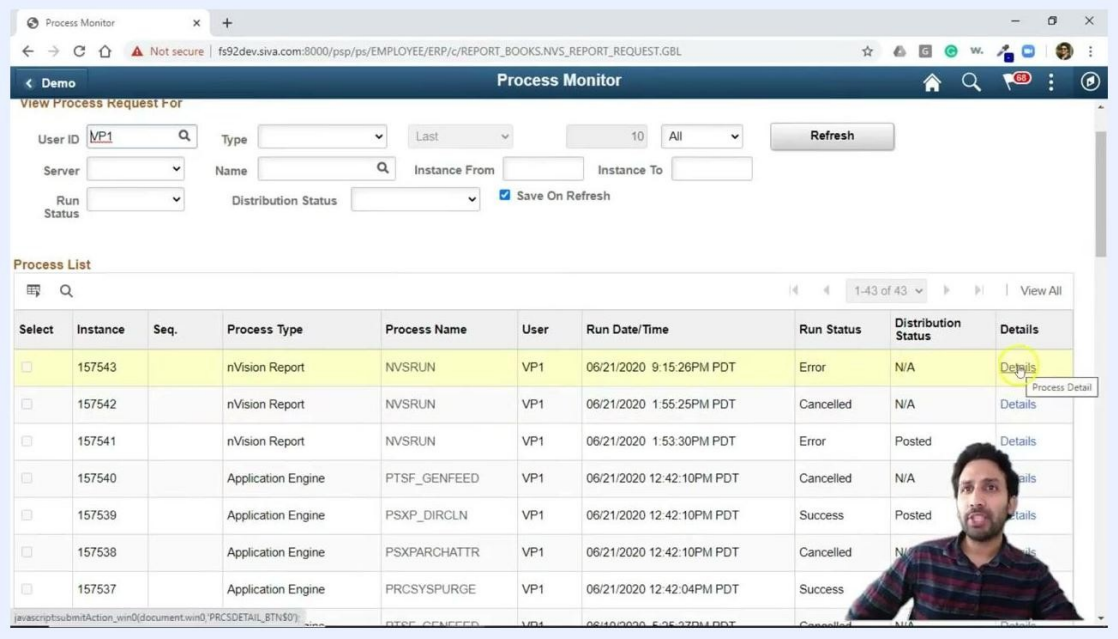


The Process Monitor list with the nVision Report run status showing Error and the Details link highlighted.

Step 20: Review the message log

1. In the Process Detail window, confirm these values:
    - **Instance:** 157543
    - **Name:** NVSRUN
    - **Run Status:** Error
    - **Type:** nVision Report
    - **Description:** nVision Report
    - **Server:** PRCS5244
2. Under **Actions**, click **Message Log** to view the error details.
3. In the Message Log, review the messages: "File not found: DEMO_NPLOSION.xnv" and "Successfully posted generated files to the report repository".

Use these messages to diagnose missing files or configuration issues. In this example, the layout file isn't on the server yet. The next sections show you how to transfer it.



The Message Log showing the error "File not found: DEMO_NPLOSION.xnv" and the message that generated files were posted to the report repository.

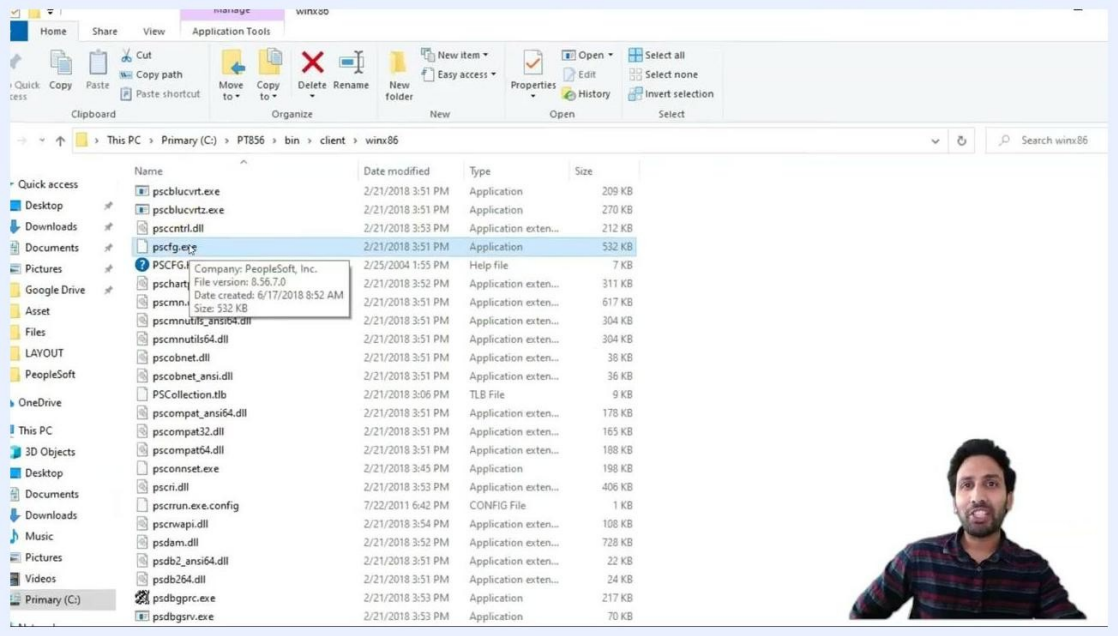
Transfer layout files to the PeopleSoft server

Step 21: Review the local nVision directory paths

By default, nVision stores layouts locally. To run reports on the web, you must transfer these layouts to the PeopleSoft server. The same directory paths must be mirrored or referenced on the server.

1. On your local machine, go to C:\PT856\bin\client\winx86.

2. Locate the executable pscfg.exe. The folder also contains various PeopleSoft DLLs and executables.

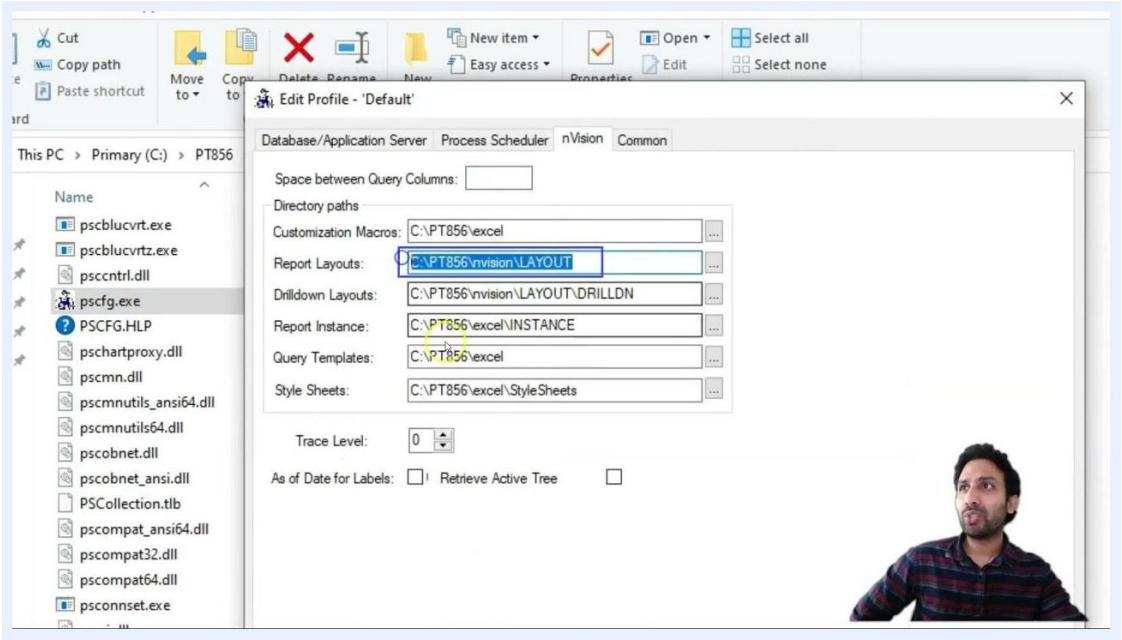


Windows Explorer open to C:\PT856\bin\client\winx86 with pscfg.exe highlighted.

3. Double-click pscfg.exe to open the **Edit Profile - 'Default'** window.
4. Go to the **nVision** tab.
5. Review and note the following directory paths:

    - Customization Macros: C:\PT856\excel
    - Report Layouts: C:\PT856\nvision\LAYOUT
    - Drilldown Layouts: C:\PT856\nvision\LAYOUT\DRILLDN
    - Report Instance: C:\PT856\excel\INSTANCE
    - Query Templates: C:\PT856\excel
    - Style Sheets: C:\PT856\excel\StyleSheets

These paths show where nVision expects to find layouts and related files locally.

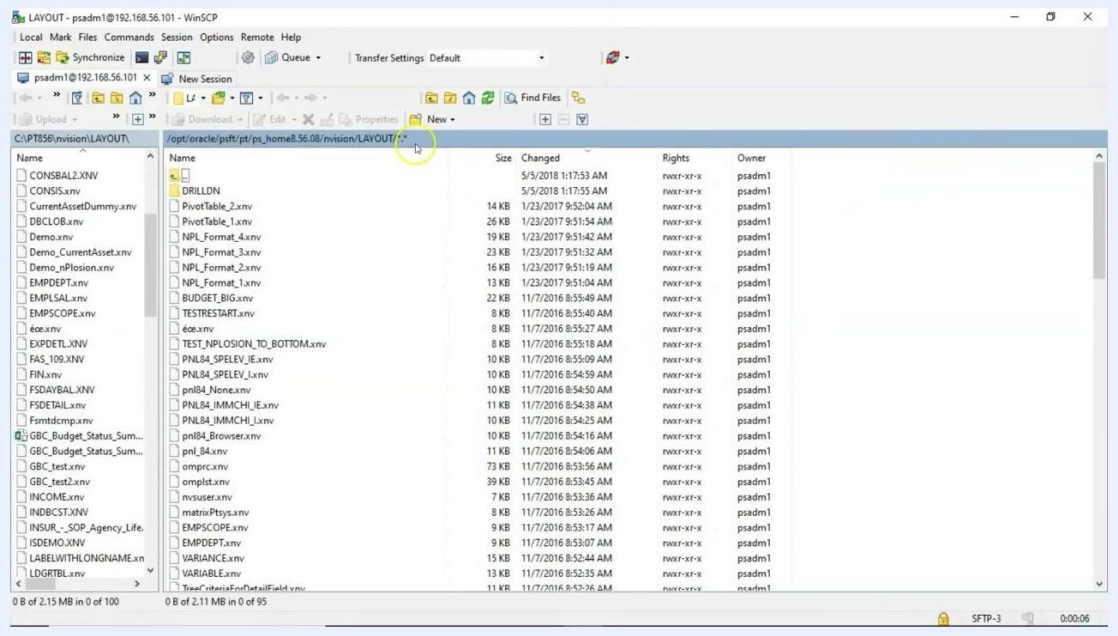


The Edit Profile window on the nVision tab showing directory paths for macros, layouts, drilldowns, instances, templates, and style sheets.

Step 22: Connect to the server with an SFTP client

1. Open an SFTP client such as WinSCP.
2. Select the correct saved session, or enter the details manually:
    - **File protocol:** SFTP
    - **Host name:** 192.168.56.101
    - **Port number:** 22
    - **User name:** psadm1
3. Enter the appropriate password.

4. Click **Login** to connect.

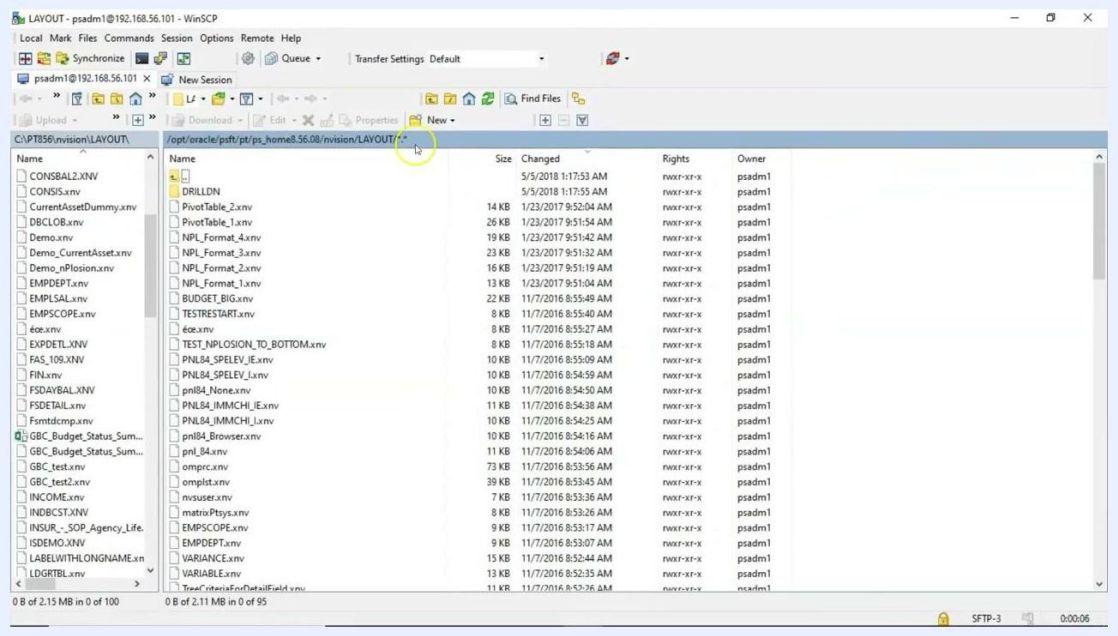


The WinSCP login window with the SFTP protocol, host 192.168.56.101, user psadm1, and a password entered.

Step 23: Browse to the nVision layout directory on the server

Once you are authenticated, browse to /opt/oracle/psft/pt/ps_home8.56.08/nvision/LAYOUT/. All nVision layouts must reside here for web-based report execution.

The directory listing shows multiple .xnv layout files with their sizes, modification dates, permissions, and owner (psadm1).



WinSCP showing the server directory /opt/oracle/psft/pt/ps_home8.56.08/nvision/LAYOUT/ with layout files, sizes, dates, permissions, and owner.

Then check both panes in the SFTP client:

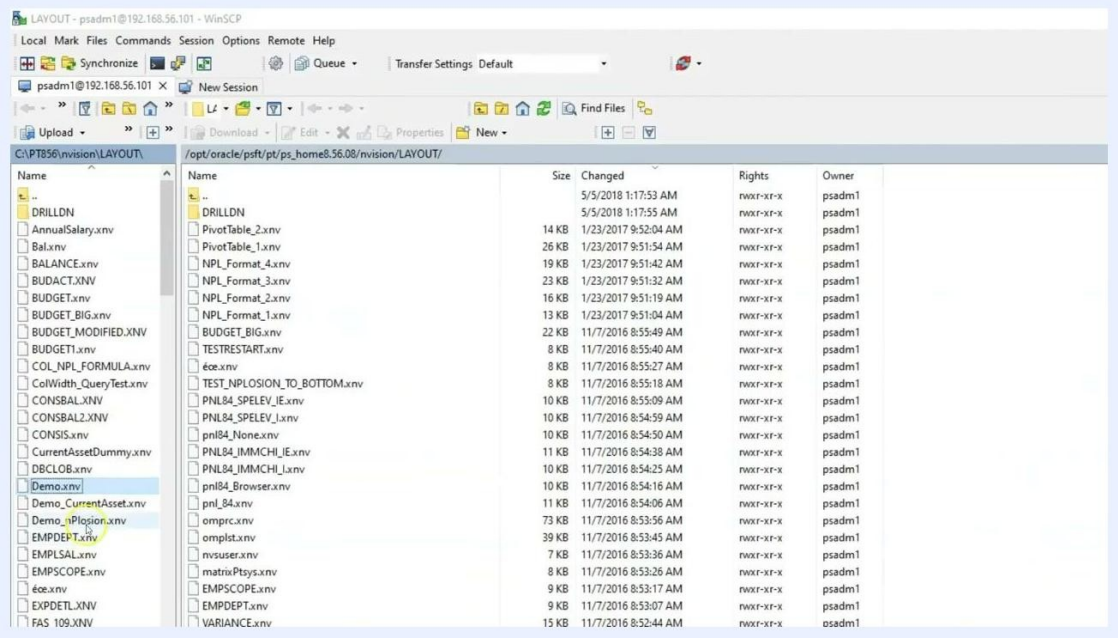
- The left pane shows your local directory, C:\PT856\nvision\LAYOUT\.
- The right pane shows the server directory, /opt/oracle/psft/pt/ps_home8.56.08/nvision/LAYOUT/.

Make sure both panes are set to the correct paths before you transfer files.

Step 24: Transfer the layout files

1. In the local directory pane, select the layout files to transfer, for example Demo.xnv and Demo_nPlosion.xnv.
2. Drag and drop the selected files from the local pane to the server pane.

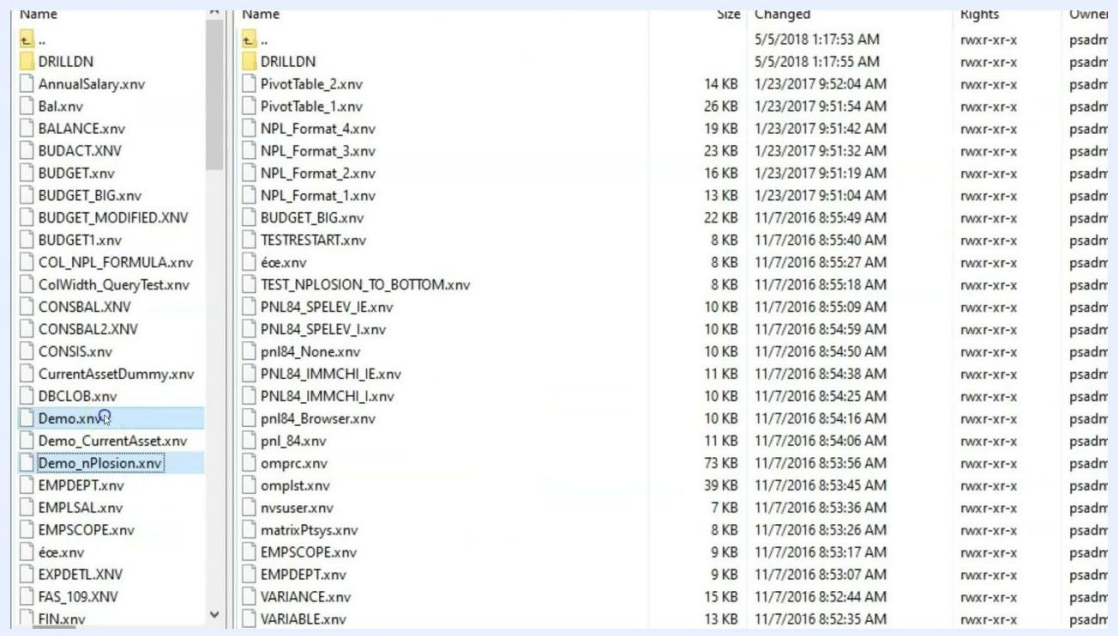
The files are copied to the server's nVision layout directory.



WinSCP with Demo.xnv and Demo_nPlosion.xnv selected in the local pane, ready to drag to the server pane.

Step 25: Confirm the transfer

After the transfer, check that the layout files appear in the server directory listing. Both Demo.xnv and Demo_nPlosion.xnv should be present. This makes the layouts available to nVision reports you run on the web.

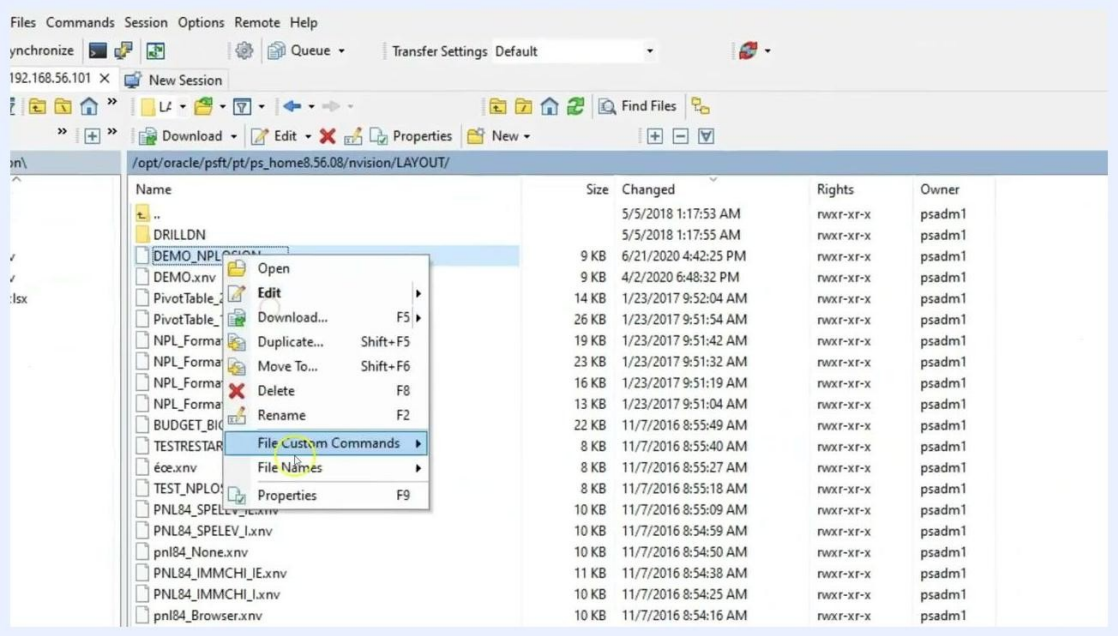


WinSCP showing Demo.xnv and Demo_nPlosion.xnv in the server directory after the transfer.

Step 26: Make sure layout file names are uppercase

The nVision process on PeopleSoft servers is case-sensitive. It expects layout file names in uppercase, for example DEMO_NPLOSION.XNV instead of Demo_nPlosion.xnv.

In WinSCP, check that DEMO_NPLOSION.xnv and DEMO.xnv are present in /opt/oracle/psft/pt/ps_home8.56.08/nvision/LAYOUT/.



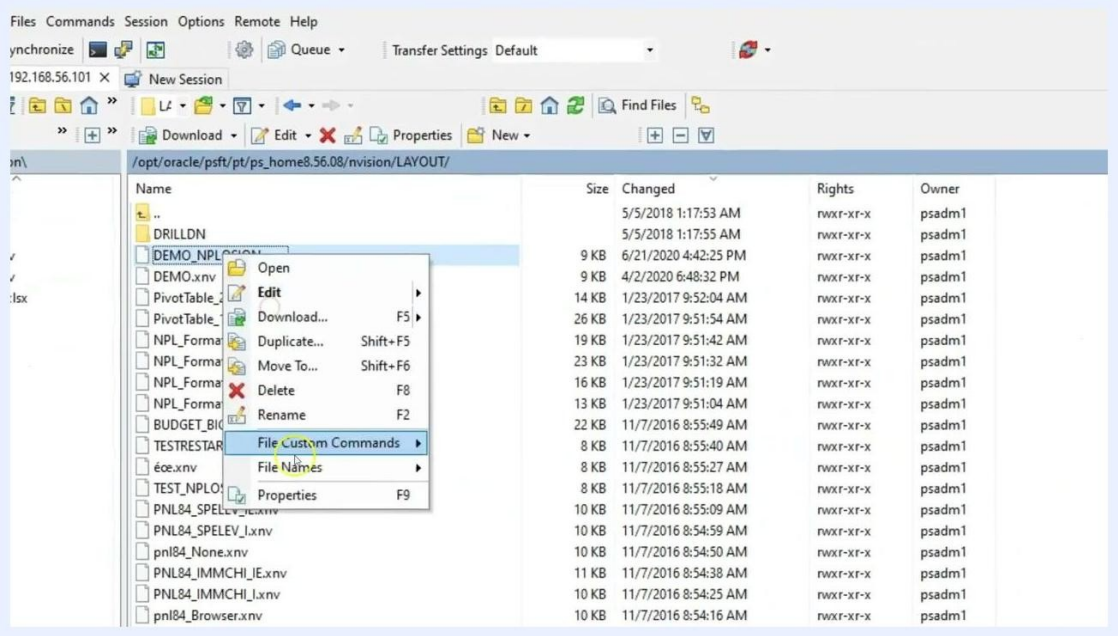
WinSCP showing DEMO_NPLOSION.xnv and DEMO.xnv highlighted in the server directory with uppercase file names.

Step 27: Update file permissions for the layout files

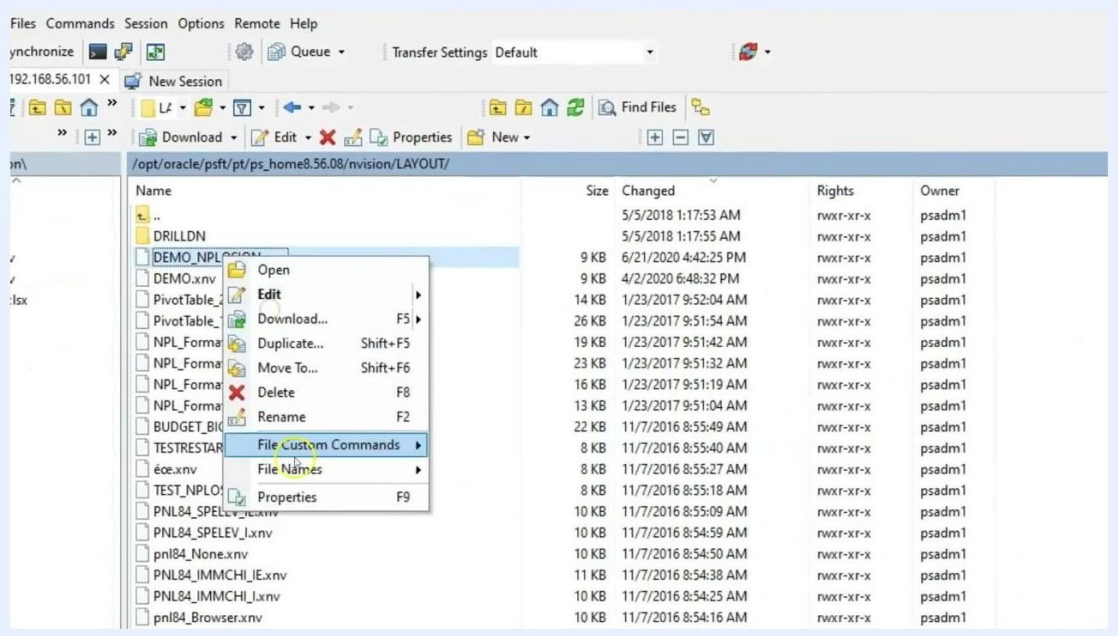
1. In the server directory, right-click the layout file, for example DEMO_NPLOSION.xnv.
2. Select **File Custom Commands** or **Properties** from the context menu.
3. In the properties dialog, make sure the following values are set:

    - **Owner:** psadm1
    - **Group:** oinstall
    - **Permissions:** Owner (Read, Write, Execute), Group (Read, Execute), Others (Read, Execute)
    - **Octal value:** 0755

4. Click **OK** to apply the changes.



The WinSCP context menu open on DEMO_NPLOSION.xnv with File Custom Commands highlighted.



The Properties dialog for DEMO_NPLOSION.xnv showing the owner, group, and permissions set to 0755.

Check nVision directory settings on the process scheduler

Step 28: Check the nVision settings in the configuration file

1. Open the psprcs.cfg configuration file on the process scheduler server.
2. Locate the [nVision] section.
3. Verify these directory settings:
    - DrillDownDir=%PS_APP_HOME%/NVISION/LAYOUT/DRILLDN:%PS_HOME%/NVISION/LAYOUT/DRILLDN
    - InstanceDir=%PS_SERVDIR%/NVISION/INSTANCE
    - LayoutDir=%PS_HOME%/NVISION/LAYOUT
4. Make sure these paths match the actual locations of your layout files.

Step 29: Edit the configuration file

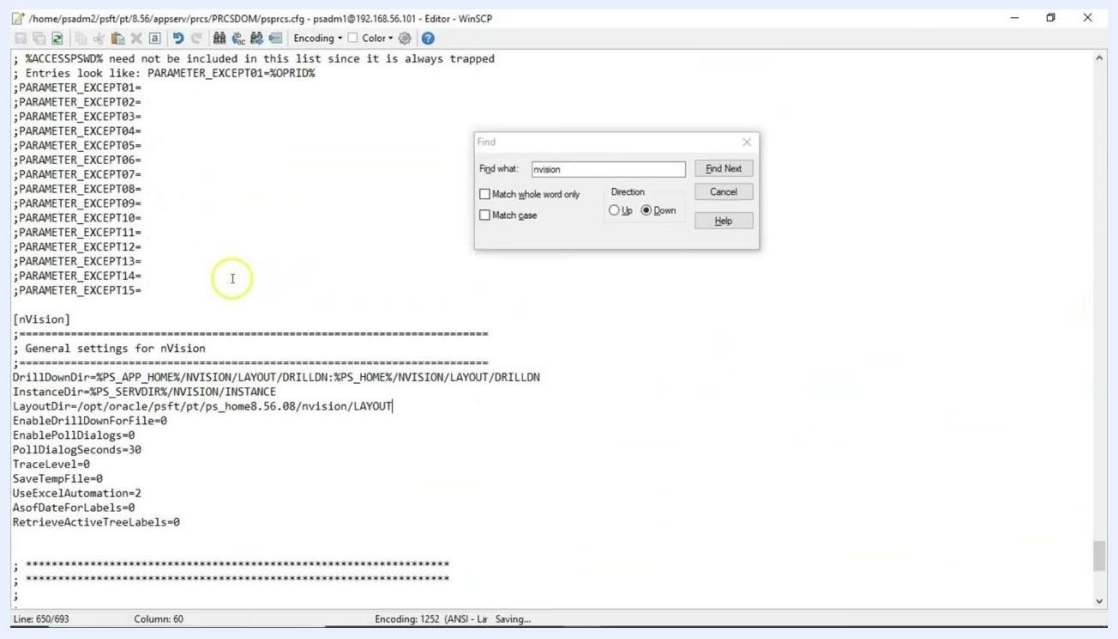
1. Open the configuration file at /home/psadm2/psft/pt/8.56/appserv/prcs/PRCSDOM/psprcs.cfg. You can use an editor such as WinSCP to access and modify it.
2. Locate the [nVision] section.
3. Make sure the following parameter is set: LayoutDir=/opt/oracle/psft/pt/ps_home8.56.08/nvision/LAYOUT
4. Save the file.

Run the nVision report on the web and retrieve the output

Step 30: Run the report request with the Web output type

1. Go to the nVision Report Request page and enter these details:
    - **Business Unit:** US001
    - **Report ID:** DEMO_N1
    - **Report Title:** Current Asset Report
    - **Layout:** DEMO_NPLOSION
2. Under **Report Date Selection**, set **As Of Reporting Date** to Specify and enter 12/31/2016.
3. Set **Tree As Of Date** to Use As Of Reporting Date. The **Override Tree As of Date if Specified in Layout** checkbox is selected.

4. Under **Output Options**, set **Type** to **Web** and **Format** to **Microsoft Excel Files (*.xls)**.
5. Click **Run Report**.

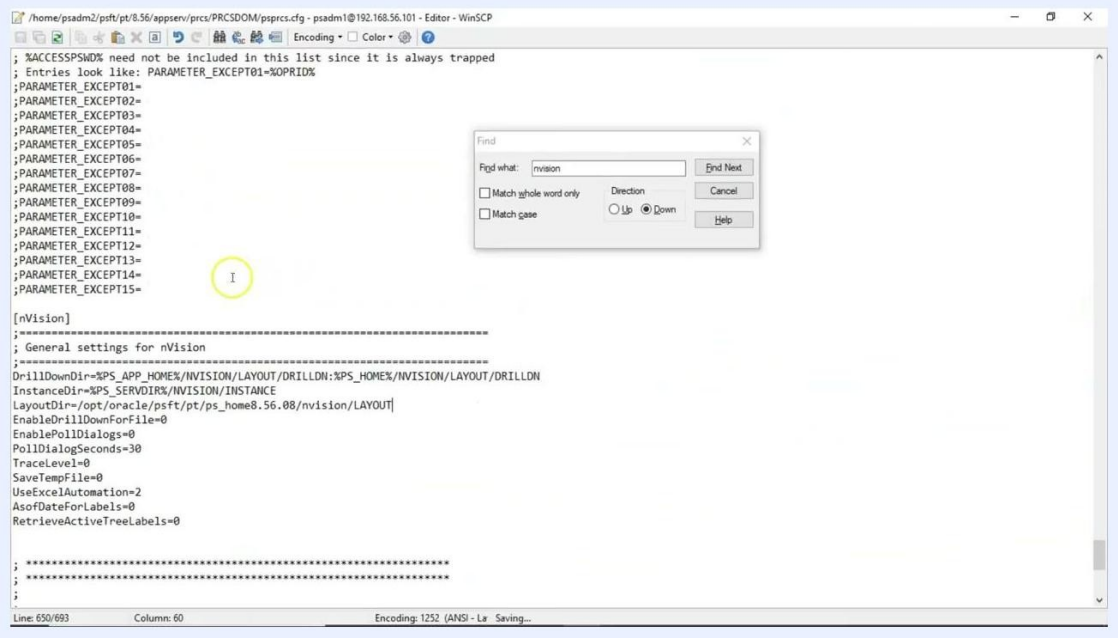


The nVision Report Request screen with all fields filled in and the cursor on the Run Report button.

Step 31: Monitor the run in Process Monitor

1. Confirm that the process type is nVision Report and the process name is NVSRUN.
2. Verify that **Run Status** is Success and **Distribution Status** is Posted.

3. Note the **Instance** number for reference, for example 157573.



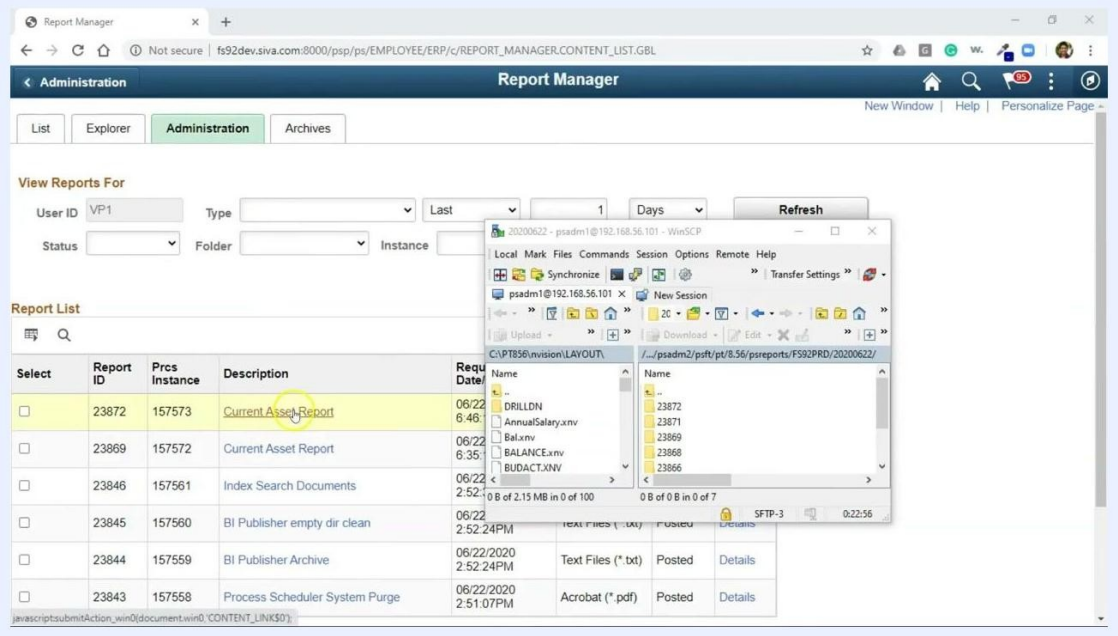
The Process Monitor showing an nVision Report with Run Status Success and Distribution Status Posted.

Step 32: Open the report output in Report Manager

1. Go to **Report Manager** under the **Administration** tab.
2. In the Report List, find your report:

    - **Report ID:** 23872
    - **Description:** Current Asset Report
    - **Format:** Microsoft Excel Files (*.xls)
    - **Status:** Posted

3. Click the **Details** link to see more information or download the report.



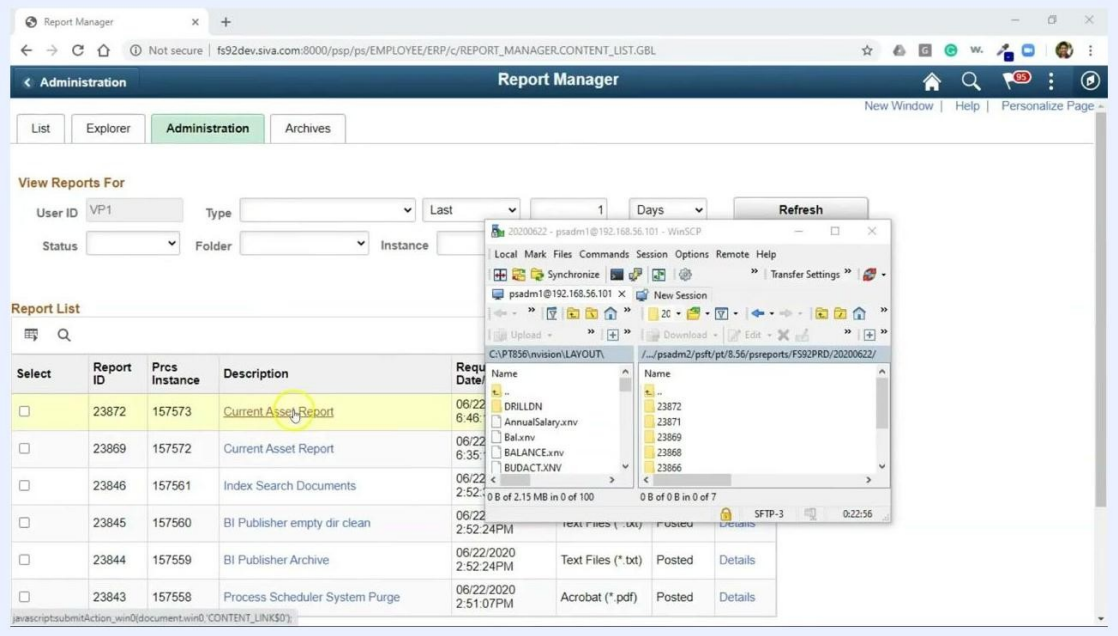
Report Manager showing the Current Asset Report with status Posted and format Microsoft Excel Files (*.xls).

Step 33: Retrieve the report directly from the server if needed

If you can't access the report through the web interface, retrieve it from the server.

1. Use a tool like WinSCP to connect to the server.
2. Go to /psadm2/psft/pt/8.56/psreports/FS92PRD/20200622/23872/.

3. Locate the output file, for example DEMO_N1.xlsx.



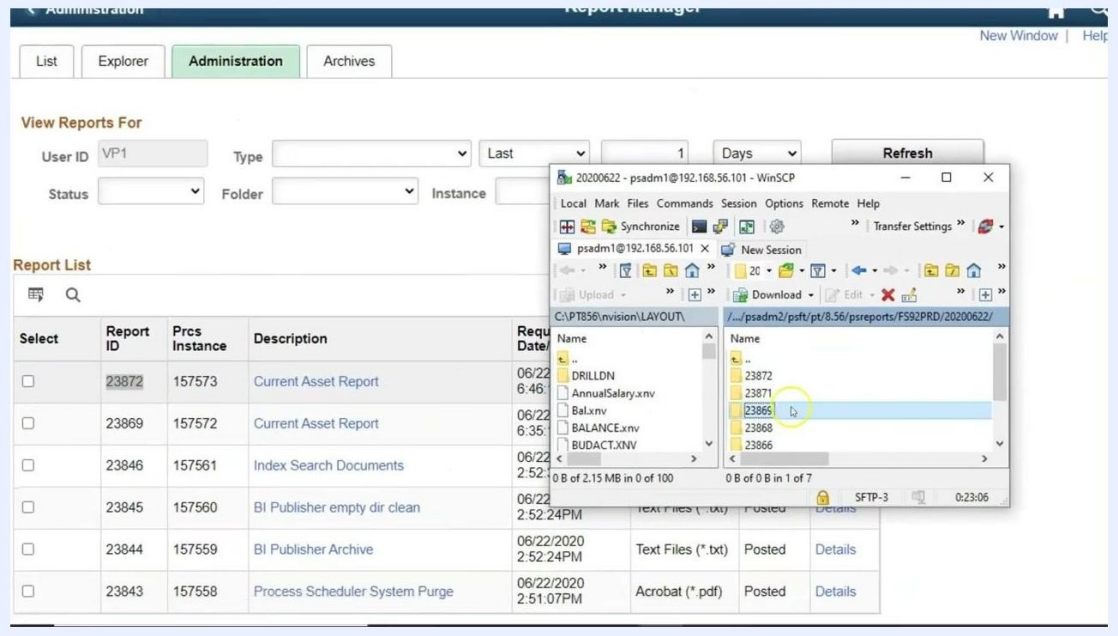
WinSCP showing the report output folder and the DEMO_N1.xlsx file.

Step 34: Open the report output in Excel

Open the output file, for example DEMO_N1.xlsx, in Microsoft Excel. The report includes a Current Assets section with account numbers, descriptions, and values for 2016 and 2015. Example values:

- USBNK - Disbursements Account: -1785 (2016), -300 (2015)
- USBNK - Collections Account: 100 (2016), 34800 (2015)

- Total Current Assets: 201948.1 (2016), 5048198 (2015)



An Excel spreadsheet showing the Current Assets report with account numbers, descriptions, and values for 2016 and 2015.

Summary

You now know how to run nVision reports in PeopleSoft from Excel and from the web. You opened a layout and report request, created and applied a custom cell style, and ran the report in both interfaces. You also transferred layout files to the server, set the Web output type, and checked the results in Process Monitor and Report Manager.

Always verify your output type and directory settings to avoid process failures.

What's next

- Apply different styles to uploaded rows or columns in the **nPlode Rows** and **nPlode Columns** tabs of the nVision Layout Options dialog.
- Transfer additional layout files to /opt/oracle/psft/pt/ps_home8.56.08/nvision/LAYOUT/, and check their uppercase names and 0755 permissions.
- Use the Process Monitor Message Log to troubleshoot any future nVision run that ends in Error.