

There are 2 main Nvision reports used by Foundation budget managers: “Actuals by Project” for people seeking to check fund balances and/or YTD revenues and expenses for a specific project (no budget information on this one) AND “Budget vs. Actuals”, which delivers YTD budget to actual data for EACH project in the entire unit.

Below please find the detailed steps on how to run both of these Nvision reports.

“Actuals by Project”:

1. Log onto PeopleSoft Reporting database: <https://psprod.fiu.edu:8700/psp/psfsprd/?cmd=login&errorPg=ckreq&languageCd=ENG>
2. Click the “Reporting Tools” link (located in tan Menu on the left).
3. Click the “PS/nVision” link (located in tan Menu on the left).
4. Click the “Define Report Request” link.
5. Enter the "FIU02" into the Business Unit field.
6. Click the “Search” button.
7. Select “Actuals by Project” report.
8. Verify/Select the “As Of Reporting Date”.
9. Click the blue “Scope and Delivery Templates” link.
10. Under “Report Scope:” enter 7-DIGIT PROJECT ID #.
11. Click the “OK” button.
12. Go to "Advanced Options" tab under Report Request and ensure that "Data from Requesting Business Unit Only" or NOT checked.
13. Go back to previous tab.
14. Click the “Run Report” button.
15. In Process Scheduler Request window, click drop-down menu for “Server Name” and select “PSNT”.
16. Click the “OK” button.
17. Click the blue “Process Monitor” link (4th link down from the top).
18. Click “Refresh” button several times until Run Status shows and “Success” and Distribution Status shows as “Posted”.
19. Click the “PS/nVision” link (located in tan Menu on the left).
20. Click on “Report Manager” link (last link under “PS/nVision”).
21. Click on report (blue link).
22. Click on “Actuals by Project [today’s date].xls.” (blue link).
23. The report will download to Excel – click “OPEN”.

“Budget vs. Actuals”:

Replace steps above with these:

7. Select “Budget vs. Actuals” report.
10. Under “Report Scope:” enter COLLEGE/UNIT NAME.
22. Click on “Budget vs. Actuals [today’s date].xls.” (blue link).