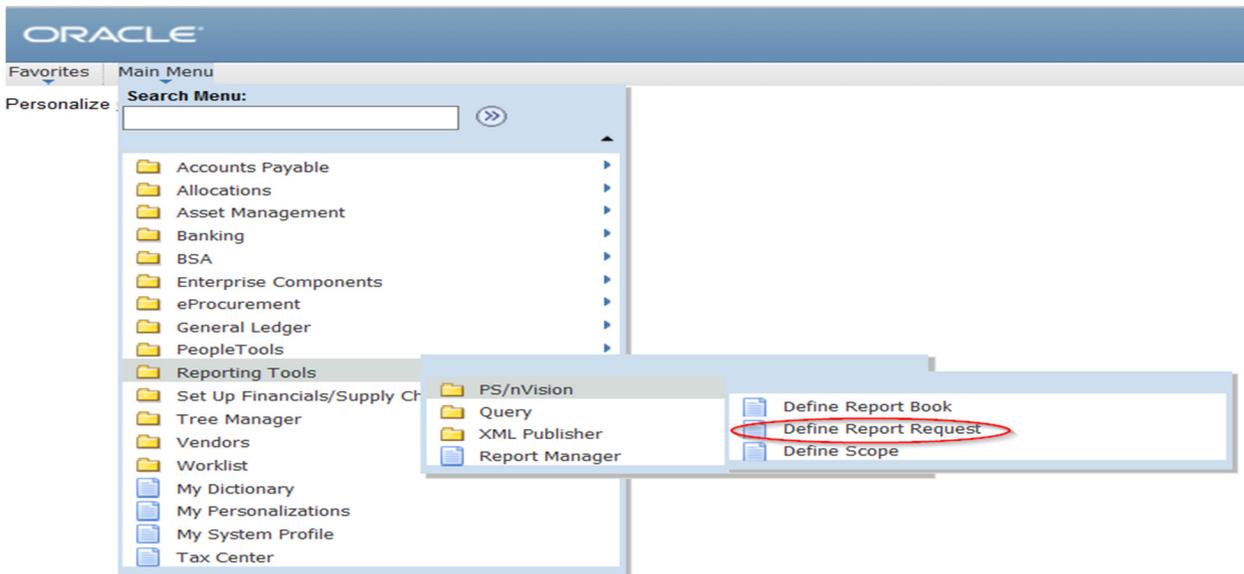


## Instructions to include nVision report information in the email subject line and the Excel file name of the email attachment

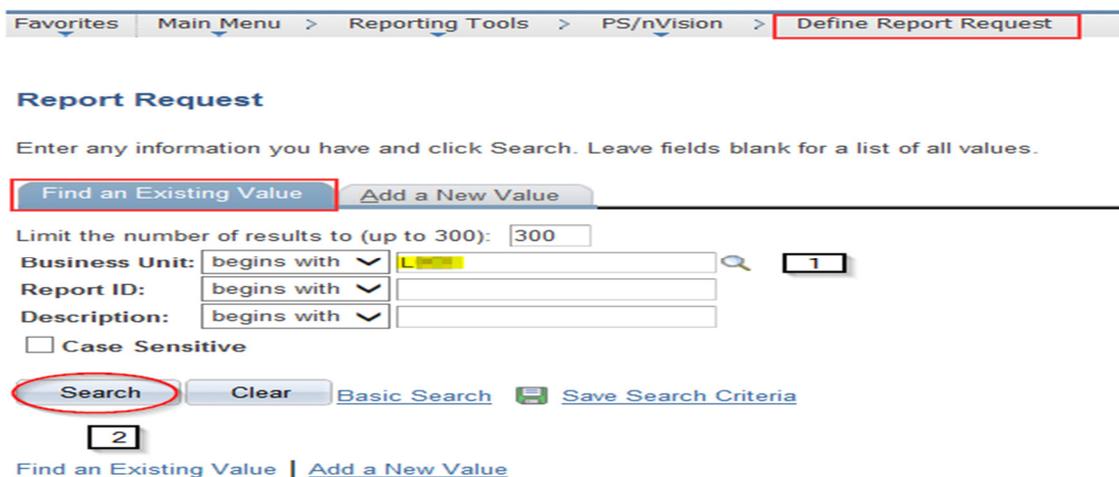
To email a “Scope Report” to a recipient, perform the following steps.

Navigate to the Define Report Request menu to start the process.

Main Menu>Reporting Tools>PS/nVision>Define Report Request:



The following screen will appear.



1. Enter the Council Business Unit (e.g. LXXX).
2. Click the search button.

The following example will include the necessary steps to email **individual scope reports** to a recipient based on project codes entered in a Tree Node.

Refer to page 6 for instructions to email a Non-Scope report

### Search Results

Business Unit	Report ID	Description
L066	ACNA_AUD	Statement of Activities-Audit
L066	ACNA_MAN	St of Act & Chng in Net Assets
L066	BUDANAL	Budget Analysis-Summary
L066	BUDANAL2	Budget Analysis Summary Fund 2
L066	BUDANAL3	Budget Analysis Summary Fund 3
L066	BUDANSC	Budget Analysis Summary Scope
L066	CAMPANL1	NCAPCampAnalysisReportScope
L066	CSOP-UR1	Comp St of Operation UR Fund 1

1. Select the nVision report to send via email.

The nVision Report Request tab screen will appear.

The screenshot shows the 'Define Report Request' screen in the nVision system. The 'Business Unit' is set to 'L066' and the 'Report ID' is 'BUDANSC'. The 'Report Title' is 'Budget Analysis Summary Scope' and the '\*Layout' is 'LC BUDGET ANALYSIS-SUMMARY'. Under 'Report Date Selection', the '\*As Of Reporting Date' is 'Specify' with a date of '12/31/2014' and a calendar icon. The '\*Tree As Of Date' is 'Use As Of Reporting Date' with a checkbox for 'Override Tree As of Date if Specified in Layout' checked. Under 'Output Options', the '\*Type' is 'Email' and the '\*Format' is 'Microsoft Excel Files (\*.xls)'. A link for 'Scope and Delivery Templates' is circled in red. At the bottom, there are buttons for 'Run Report', 'Save', 'Return to Search', 'Notify', 'Add', and 'Update/Display'.

1. Enter the report date.
2. Select "Email" in the Type field.
3. Click the Scope and Delivery Templates link.

## nVision Email Output

Business Unit:  Report ID: BUDANSCReport Scope: 1

Enter your report scope.

[Scope Definition](#)File Template: 2

Enter a file name for your instances. Use variables to create unique report file names.

Examples: expense.xls, %RID%.htm, %FY4% %RTT%.xls

Directory Name Template:

Enter a directory name for your instances. Use variables to create unique directory names. If the directory doesn't exist PS/nVision will create it.

Examples: Q:\Reports\%SFV%- %RID%.htm, C:\%FY4% %RTT%\

Email Template: 3

Enter a list of email addresses or use variables to specify who receives report instances.

Examples: username@xxx.com, %DES.DEPTID.EMAILID.EMAILID%

4

OK

Cancel

1. Select the individual report scope.
2. Enter %RTT%-%SFV%-%SFD%-%ASD%.XLS in the file template field.
  - a. RTT – Report Title
  - b. SFV – Scope Field Value (Project Code)
  - c. SFD – Scope Field Definition (Project Code Description)
  - d. ASD – As of Reporting Date
3. Enter the email address of the recipient(s). Multiple email addresses should be separated by a comma ([john.doe@scouting.org](mailto:john.doe@scouting.org), [jane.doe@yahoo.com](mailto:jane.doe@yahoo.com)).
4. Click the OK button.

The following screen will appear.

nVision Report Request    **Advanced Options**    Query Prompts

**Business Unit:** L ■■■    **Report ID:** BUDANSC    [Copy to Another Business Unit / Clone](#)  
[Delete This Report Request](#)  
[Transfer to Report Books](#)  
[Process Monitor](#)  
[Report Manager](#)  
[Share This Report Request](#)

**Report Title:** Budget Analysis Summary Scope

**\*Layout:** LC BUDGET ANALYSIS-SUMMARY

**Report Date Selection**

**\*As Of Reporting Date:** Specify ▼    12/31/2014

**\*Tree As Of Date:** Use As Of Reporting Date ▼  
 **Override Tree As of Date if Specified in Layout**

**Output Options**

**\*Type:** Email ▼    [Scope and Delivery Templates](#)  
**\*Format:** Microsoft Excel Files (\*.xls) ▼

**Run Report** 2

Save    Return to Search    Notify    Add    Update/Display

nVis 1 Report Request | [Advanced Options](#) | [Query Prompts](#)

1. Click the Save button.
2. Click the Run Report button.

**Process Scheduler Request**

**User ID:** KSPANIER    **Run Control ID:**

**Server Name:** ▼    **Run Date:** 09/08/2014

**Recurrence:** ▼    **Run Time:** 12:19:43PM    [Reset to Current Date/Time](#)

**Time Zone:**

Process List					
Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	nVision Report	NVSRUN	nVision Report	Default ▼	Default ▼

1  
 OK    Cancel

1. Click the OK button.

The individual scope reports will be emailed to the intended recipient(s).

The examples listed below show the report name, project code, project code description and report as of date in the email subject line and are included in the excel file name.

From	Subject	Received	Size	Categories
donotreply@BSA...	Output from Budget Analysis Summary Scope-080-MR District Dinner-2014-12-31 (#2051992)	Mon 9/...	40 KB	
donotreply@BSA...	Output from Budget Analysis Summary Scope-084-MR Fall Camporee-2014-12-31 (#2051992)	Mon 9/...	40 KB	
donotreply@BSA...	Output from Budget Analysis Summary Scope-081-MR Klondike-2014-12-31 (#2051992)	Mon 9/...	40 KB	
donotreply@BSA...	Output from Budget Analysis Summary Scope-002-MR District-2014-12-31 (#2051992)	Mon 9/...	40 KB	

The attached nVision report name

Output from Budget Analysis Summary Scope-080-MR Dist

File Message

Ignore X Reply Reply All Forward More Meeting

Junk Delete

Access Data Coll... To Manager

Team E-mail Done

Reply & Delete Create New

Move

From: donotreply@BSAfiscals.scouting.org

To: Kent Spanier

Cc:

Subject: Output from Budget Analysis Summary Scope-080-MR District Dinner-2014-12-31 (#2051992)

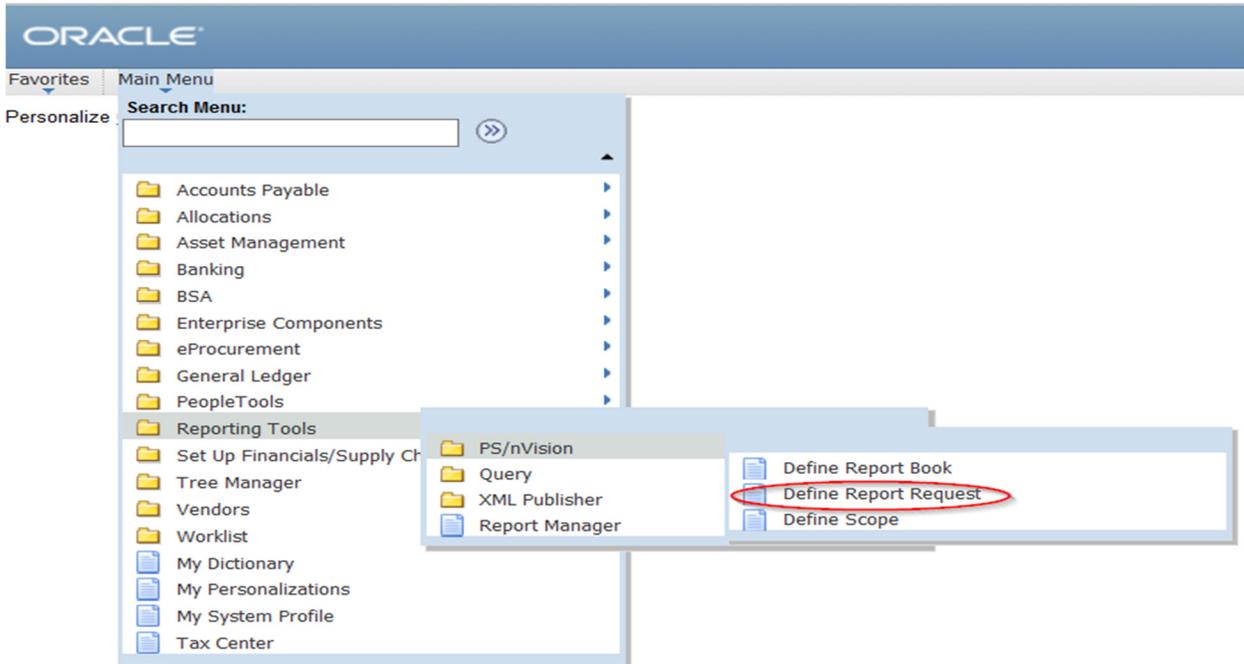
Message Budget Analysis Summary Scope-080-MR District Dinner-2014-12-31.xlsx (23 KB)

Message from Process Scheduler running on system W219677DBSS2017, using database P91FBSA:

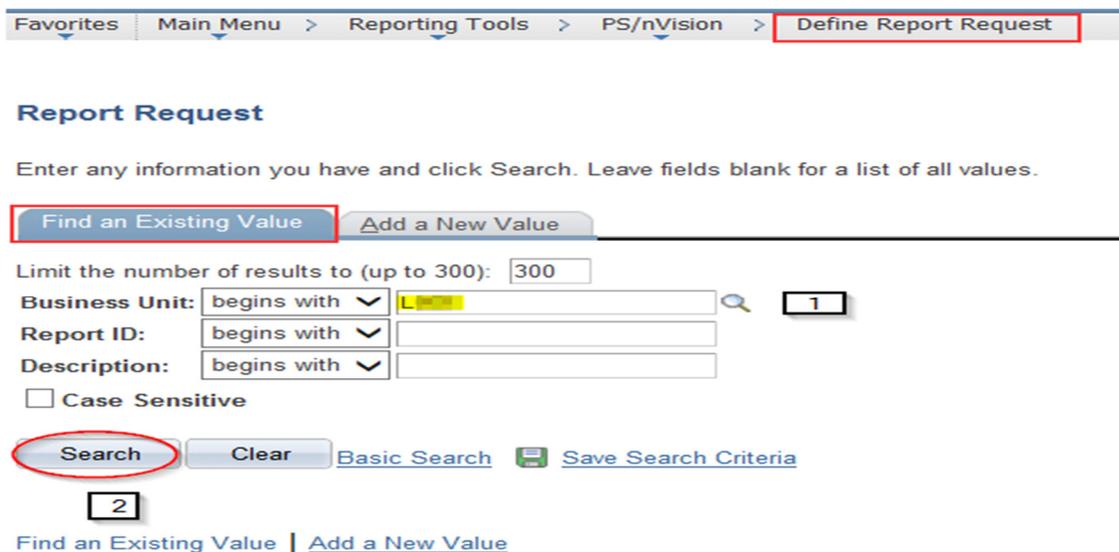
**To email a Non-Scope Report to a recipient, perform the following steps.**

Navigate to the Define Report Request menu to start the process.

**Main Menu>Reporting Tools>PS/nVision>Define Report Request:**



The following screen will appear.



1. Enter the Council Business Unit (e.g. LXXX).
2. Click the search button.

The following screen will appear.

Search Clear Basic Search Save Search Criteria

### Search Results

View All First 1-50 of 50 Last

Business Unit	Report ID	Description
L	ACNA_AUD	Statement of Activities-Audit
L	ACNA_MAN	St of Act & Chng in Net Assets
L	BUDANAL	Budget Analysis-Summary
L	BUDANAL2	Budget Analysis Summary Fund 2
L	BUDANAL3	Budget Analysis Summary Fund 3
L	BUDANSC	Budget Analysis Summary Scope
L	CAMPANL1	NCAPCampAnalysisReportScope
L	CSOP-UR1	Comp St of Operation UR Fund 1
L	CSOP-UR2	Comparative St of Opns Fund 2

1. Select the nVision report to send via email.

The following screen will appear.

nVision Report Request Advanced Options Query Prompts

Business Unit: L066 Report ID: CSOP-UR1 [Copy to Another Business Unit / Clone](#)

Report Title:  [Delete This Report Request](#)

\*Layout:  [Transfer to Report Books](#)

[Process Monitor](#)

[Report Manager](#)

[Share This Report Request](#)

Report Date Selection

\*As Of Reporting Date:

\*Tree As Of Date:

Override Tree As of Date if Specified in Layout

Output Options

\*Type:   [Scope and Delivery Templates](#)

\*Format:

nVision Report Request | [Advanced Options](#) | [Query Prompts](#)

1. Enter the report date.
2. Select "Email" in the Type field.
3. Click the Scope and Delivery Templates link.

## nVision Email Output

Business Unit: L Report ID: CSOP-UR1

Report Scope:

 Enter your report scope. [Scope Definition](#)

File Template: 1

Enter a file name for your instances. Use variables to create unique report file names.

Examples: expense.xls, %RID%.htm, %FY4% %RTT%.xls

Directory Name Template:

Enter a directory name for your instances. Use variables to create unique directory names. If the directory doesn't exist PS/nVision will create it.

Examples: Q:\Reports\%SFV%- %RID%.htm, C:\%FY4% %RTT%\

Email Template: 2

Enter a list of email addresses or use variables to specify who receives report instances.

Examples: username@xxx.com, %DES.DEPTID.EMAILID.EMAILID%

3

1. Enter %RTT%-%ASD%.XLS in the file template field.
  - a. RTT – Report Title
  - b. ASD – As of Reporting Date
2. Enter the email address of the recipient(s). Multiple email addresses should be separated by a comma ([john.doe@scouting.org](mailto:john.doe@scouting.org), [jane.doe@yahoo.com](mailto:jane.doe@yahoo.com)).
3. Click the OK button.

The following screen will appear.

nVision Report Request    **Advanced Options**    Query Prompts

Business Unit: L066    Report ID: CSOP-UR1    [Copy to Another Business Unit / Clone](#)  
[Delete This Report Request](#)  
 Report Title:     [Transfer to Report Books](#)  
[Process Monitor](#)  
 \*Layout:     [Report Manager](#)  
[Share This Report Request](#)

**Report Date Selection**

\*As Of Reporting Date:    

\*Tree As Of Date:

Override Tree As of Date if Specified in Layout

**Output Options**

\*Type:     [Scope and Delivery Templates](#)  
 \*Format:

**Run Report** 2

Save    Return to Search    Notify    Add    Update/Display

nVision 1 Report Request | [Advanced Options](#) | [Query Prompts](#)

1. Click the Save button.
2. Click the Run Report button.

**Process Scheduler Request**

User ID: KSPANIER    Run Control ID:

Server Name:     Run Date:    
 Recurrence:     Run Time:       
 Time Zone:

Select	Description	Process Name	Process Type	*Type	*Format
<input checked="" type="checkbox"/>	nVision Report	NVSRUN	nVision Report	Default <input type="text" value=""/>	Default <input type="text" value=""/>

1  
 OK   

1. Click the OK button.

The report will be emailed to the intended recipient(s).

The examples listed below show the report name and the report as of date in the email subject line and are included in the excel file name.

