

Oracle - PeopleSoft PS / nVision for General Ledger Rel 9.2

Code:	PPL-NV-GL-9-2
Length:	5 days
URL:	View Online

This PeopleSoft PS / nVision for General Ledger Rel 9.2 training provides step-by-step instruction for implementing, using and maintaining the fundamentals of PS/nVision for General Ledger 9.2. You'll learn how to structure your organization for reporting efficiency using business units, ledgers, trees and ChartField management from the ground up.

Learn To:

- Describe PS/nVision.
- Plan PS/nVision reports.
- Develop and Build PS/nVision reports.
- Process PS/nVision reports.
- Personalize PS/nVision Nvsuser.
- Run PS/nVision reports from the web.

Benefits to You

Enrolling in this course will introduce you to the latest PS/nVision design using Excel 2007 features through hands-on activities. You'll be presented with best practices for achieving maximum efficiency. You'll also learn valuable information from the implementer's perspective, as well as for end-users. Activities include early decision-making regarding structure based on business needs, troubleshooting and efficiency.

Process Flow of an Implementation

Activities throughout the course follow the process flow of an implementation. You'll create a variety of reports, including financial statements like balance sheets and income statements, as well as transaction listings using tables other than the ledger (Payables, for example).

Course Pace & Duration

This is an intensive, 5-day course.

Skills Gained

- Design PS/nVision Reports
- Create and Process Financial Statements
- Create Matrix Layouts from Various Tables
- Use DrillDown and nPlosion for Detail Reporting and Analysis
- Run PS/nVision Reports from the Web

- Create Tabular Layouts and Run Transaction Reports
- Use Summary Ledgers for Reporting
- Use Scopes and Scope Variables
- Personalize PS/nVision

Who Can Benefit

- Developer
- End User
- Implementer
- Manager
- Systems Administrator

Prerequisites

Required Prerequisite

- Understanding of basic navigation and PeopleSoft concepts.
- Use of control tables to enforce business rules
- Able to run processes and reports

Course Details

Topics

- Course and Technology Overview
 - Objectives
 - Agenda
 - Describing PS/nVision
 - Describing PeopleSoft Reporting Tools
- Planning to Implement PS/nVision
 - Describing the Ledger table
 - Describing TimeSpans
 - Describing PeopleSoft Trees
- Developing PS/nVision Reports
 - Describing PS/nVision Components
 - Describing PS/nVision Report Creation Steps
 - Planning the PS/nVision Layout
 - Building the PS/nVision Layout
 - Defining and Running Report Requests
- Building PS/nVision Reports with Variables and Labels
 - Setting Up PS/nVision Variables

- Combining Text with PS/nVision Variables
- Using the Text Function
- Using Variables on the Report Request
- Setting Up Date and Time Stamps
- Setting Up Report Labels
- Using nPlosion
 - Defining nPlosion
 - Copying Formulas
 - Using nPlosion Features
 - Using the nPlosion Variable
 - Setting Up Advanced nPlosion Options
- Using Scopes and Scope Variables
 - Defining Scopes
 - Setting Up Scope Variables
 - Combine PS/nVision Scope Variables
 - Defining the Scope Descriptive Field (DES) Variable
 - Using Scopes with Multiple Fields
- Implementing Summary Ledgers
 - Analyzing Summary Ledger Requirements
 - Setting Up Summary Ledgers
 - Running Summary Ledgers
 - Describing Detail Versus Summary Ledger Reporting
 - Defining Summary Trees
 - Using Summary Trees in PS/nVision Layouts
 - Translating Summary Ledgers to Detail
- Using DrillDown
 - Define DrillDown Options
 - Using DrillDown
- Using Query Criteria in Matrix Layouts
 - Setting Up Query Criteria in a Matrix Layout
 - Using AutoDrill
- Using Query Criteria in Tabular Layouts
 - Defining Queries for Tabular Layouts
 - Creating Tabular Layouts
 - Combining Tabular and Matrix Layouts
- Using PS/nVision on the Web
 - Defining and Running Report Requests on the Web
 - Using DrillDown on the Web
 - Defining Scopes on the Web
 - Defining Report Books on the Web
- Personalizing PS/nVision

- Using the Nvsuser Home Page
- Personalizing the Nvsuser Buttons
- Setting Report Preferences
- Personalizing the Drill Menu and Toolbar
- Personalizing Style Sheets
- Final Course Activities and Course Review
 - Describing PS/nVision
 - Panning PS/nVision Reports
 - Developing and Building PS/nVision Reports
 - Running Multiple PS/nVision Reports
 - Personalizing PS/nVision Nvsuser
- Appendices
 - PS/nVision Variables and Labels Quick Reference Guide
 - PS/nVision Reference Material
 - Excel Pivot Tables
- Objectives
- Agenda
- Describing PS/nVision
- Describing PeopleSoft Reporting Tools

Planning to Implement PS/nVision

- Describing the Ledger table
- Describing TimeSpans
- Describing PeopleSoft Trees

Developing PS/nVision Reports

- Describing PS/nVision Components
- Describing PS/nVision Report Creation Steps
- Planning the PS/nVision Layout
- Building the PS/nVision Layout
- Defining and Running Report Requests

Building PS/nVision Reports with Variables and Labels

- Setting Up PS/nVision Variables
- Combining Text with PS/nVision Variables
- Using the Text Function
- Using Variables on the Report Request
- Setting Up Date and Time Stamps
- Setting Up Report Labels

Using nPlosion

- Defining nPlosion
- Copying Formulas
- Using nPlosion Features
- Using the nPlosion Variable
- Setting Up Advanced nPlosion Options

Using Scopes and Scope Variables

- Defining Scopes
- Setting Up Scope Variables
- Combine PS/nVision Scope Variables
- Defining the Scope Descriptive Field (DES) Variable
- Using Scopes with Multiple Fields

Implementing Summary Ledgers

- Analyzing Summary Ledger Requirements
- Setting Up Summary Ledgers
- Running Summary Ledgers
- Describing Detail Versus Summary Ledger Reporting
- Defining Summary Trees
- Using Summary Trees in PS/nVision Layouts
- Translating Summary Ledgers to Detail

Using DrillDown

- Define DrillDown Options
- Using DrillDown

Using Query Criteria in Matrix Layouts

- Setting Up Query Criteria in a Matrix Layout
- Using AutoDrill

Using Query Criteria in Tabular Layouts

- Defining Queries for Tabular Layouts
- Creating Tabular Layouts
- Combining Tabular and Matrix Layouts

Using PS/nVision on the Web

- Defining and Running Report Requests on the Web
- Using DrillDown on the Web
- Defining Scopes on the Web
- Defining Report Books on the Web

Personalizing PS/nVision

- Using the Nvsuser Home Page
- Personalizing the Nvsuser Buttons
- Setting Report Preferences
- Personalizing the Drill Menu and Toolbar
- Personalizing Style Sheets

Final Course Activities and Course Review

- Describing PS/nVision
- Panning PS/nVision Reports
- Developing and Building PS/nVision Reports
- Running Multiple PS/nVision Reports
- Personalizing PS/nVision Nvsuser

Appendices

- PS/nVision Variables and Labels Quick Reference Guide
- PS/nVision Reference Material
- Excel Pivot Tables

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