



LOYOLA
UNIVERSITY
CHICAGO

Preparing people to lead extraordinary lives

WebFOCUS Reporting Training Manual



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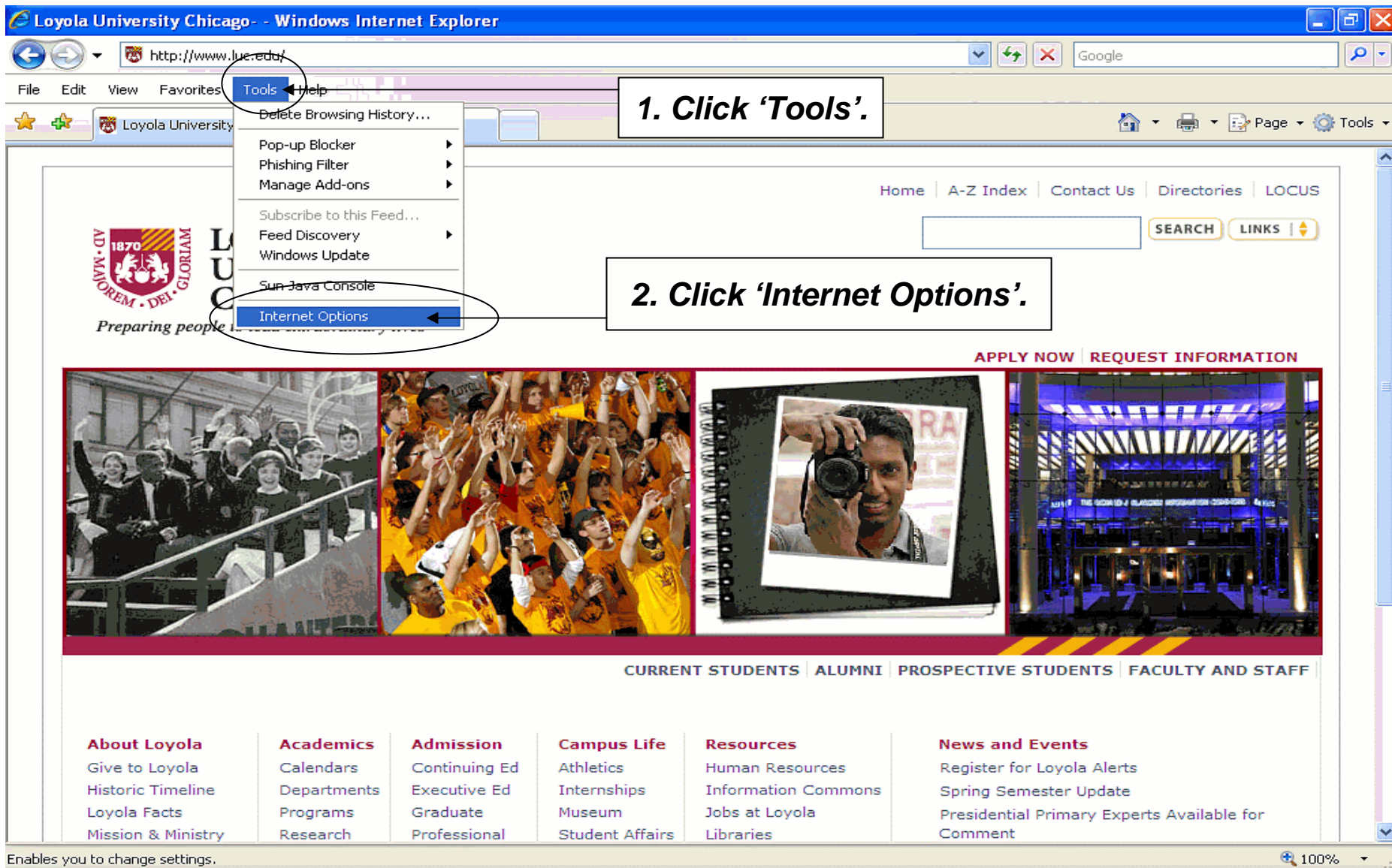
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1 - Key information about WebFOCUS:

- WebFOCUS is a data extract tool for LU administrators to extract information from Lawson.
- Reports are parameter driven and data may be saved in Excel or PDF format.
- ***Please note: The data contained in WebFOCUS is from the previous day.***
- WebFOCUS can be used with both Microsoft Internet Explorer or Mozilla Firefox.
- **The data extracted from WebFOCUS is for *internal* use only.**

2 - Internet Explorer Security Settings

Depending on your computer's internet security settings, WebFOCUS report downloads may be blocked by your computer. To ensure reports open properly, follow these steps to adjust your internet security settings:



The screenshot shows a Windows Internet Explorer browser window with the address bar set to <http://www.lu.edu/>. The 'Tools' menu is open, and 'Internet Options' is highlighted. Two callout boxes provide instructions: '1. Click 'Tools'.' and '2. Click 'Internet Options'.' The browser's status bar at the bottom indicates 'Enables you to change settings.' and shows a 100% zoom level.

1. Click 'Tools'.

2. Click 'Internet Options'.

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Loyola Facts	Programs	Graduate	Museum	Jobs at Loyola	Presidential Primary Experts Available for Comment
Mission & Ministry	Research	Professional	Student Affairs	Libraries	

3. Click 'Security'.

The screenshot shows the 'Internet Options' dialog box with the 'Security' tab selected. The 'Trusted sites' zone is highlighted with a green checkmark. A callout box points to the 'Trusted sites' icon. Below the zone selection, the 'Trusted sites' section is expanded, showing a green checkmark and a description: 'This zone contains websites that you trust not to damage your computer or your files.' A callout box points to the 'Sites' button. The 'Security level for this zone' is set to 'Custom'. Below this, there are instructions: 'Custom settings. - To change the settings, click Custom level. - To use the recommended settings, click Default level.' At the bottom of the dialog, there are buttons for 'Custom level...', 'Default level', 'Reset all zones to default level', 'OK', 'Cancel', and 'Apply'.

4. Click 'Trusted Sites'.

5. Click 'Sites'.



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Internet Options

General Security Privacy Content Connections Programs Advanced

Trusted sites

You can add and remove websites to this zone so that this zone will use the zone's security settings.

Add this website to the zone:

https://webreports.luc.edu

Add

Websites:

Remove

Require server verification (https:) for all sites in this zone

Close

6. Type <https://webreports.luc.edu> and click 'Add'.

7. Click 'Close'.

Internet Options

General Security Privacy Content Connections Programs Advanced

Select a zone to view or change security settings.

Internet Local intranet **Trusted sites** Restricted sites

Trusted sites

This zone contains websites that you trust not to damage your computer or your files.

Security level for this zone

Custom

Custom settings.

- To change the settings, click Custom level.
- To use the recommended settings, click Default level.

Custom level... Default level

Reset all zones to default level

OK Cancel Apply

8. Click 'Custom level'.



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SEARCH LINKS

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Loyola University Chicago - Windows Internet Explorer

http://www.luc.edu/

File Edit View Favorites Tools Help

Loyola University Chicago-

Tools

9. Scroll down to the 'Downloads' section. Under 'Automatic prompting for file downloads', click 'Enable'.

Internet Options

General Security

Security Settings

Settings

- Prompt
- Downloads
 - Automatic prompting for file downloads
 - Disable
 - Enable**
 - File download
 - Disable
 - Enable
 - Font download
 - Disable
 - Enable
 - Prompt
- Enable .NET Framework setup
 - Disable
 - Enable
- Miscellaneous

*Takes effect after you restart Internet Explorer

Reset custom settings

Reset to: Medium (default) Reset...

10. Click 'OK'.

OK Cancel

1870 LOYOLA UNIVERSITY CHICAGO
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Internet 100%



Internet Options

General Security Privacy Content Connections Programs Advanced

Security Settings - Trusted Sites Zone

Settings

- Prompt
- Downloads
 - Automatic prompting for file downloads
- Disable
- Enable
 - File download

Warning!

Are you sure you want to change the settings for this zone?

11. Click 'Yes'.

Reset to: Medium (default)

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Internet Options

General Security Privacy Content Connections Programs Advanced

Select a zone to view or change security settings.

Internet Local intranet **Trusted sites** Restricted sites

Trusted sites

✓ This zone contains websites that you trust not to damage your computer or your files.

Security level for this zone

Custom
Custom settings.
- To change the settings, click Custom level.
- To use the recommended settings, click Default level.

12. Click 'OK'.

APPLY NOW REQUEST INFORMATION



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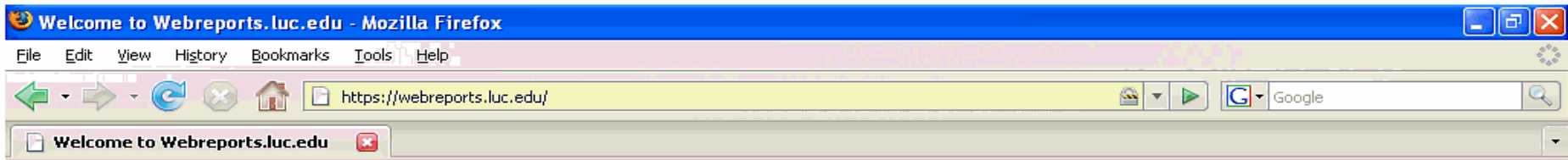
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3 - Accessing the WebFOCUS Web Page

To access the WebFOCUS launch page, go to the following URL: <https://webreports.luc.edu>



Welcome to Loyola University's WebFOCUS Launch Page

[WebFOCUS Documentation](#)

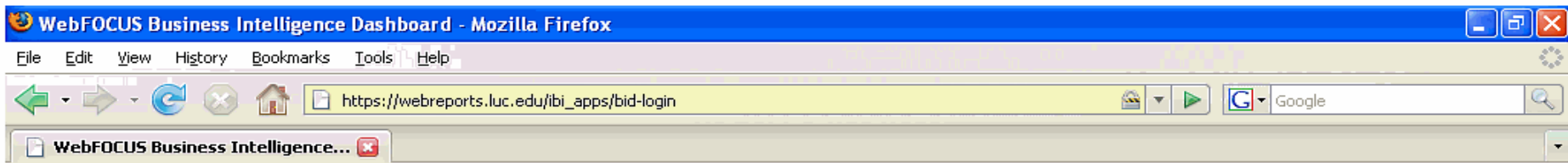
[Managed Reporting Logon](#)(For Report Writers)

[Dashboard Logon Page](#)*(For Report Viewers)

* To simplify dashboard navigation users will login to the "General Dashboard View" and then click on the "Views" link in the upper right. This will show users only the group sites to which they have access.

Click on 'Dashboard Logon Page'.

4 - Login Screen



Login

Help

Managed Reporting sign on :

User ID:

Password:

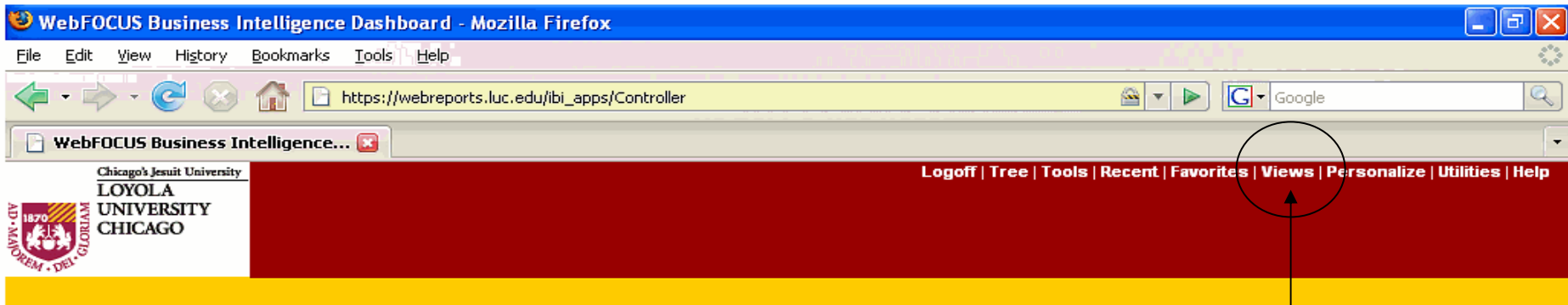
Log in using your network ID and password.

•Click 'Logon'.

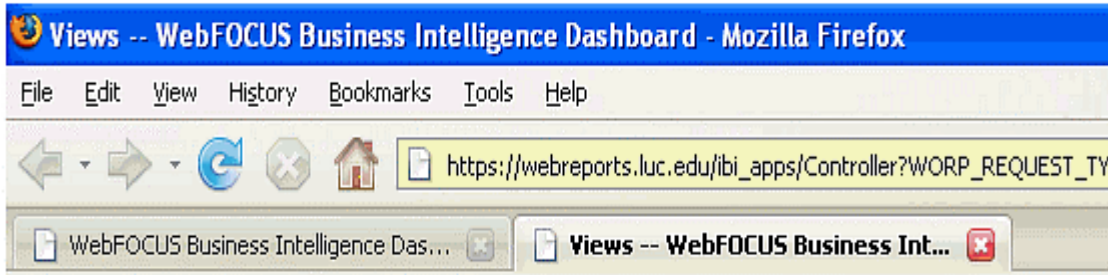
POWERED BY
**Information
Builders**

5 - 'Views'

The 'views' page is a listing of the domains (report groups) you have access to view.



Please Click "Views" above to choose your group site.



1. Click 'Views'. A new browser window / tab will open.

- SF group site
- SPA ID Lookup
- SPA Grant Reports
- Capitals
- Financial Reports
- My View

2. Click 'Financial Reports' to view all available reports.

Close

6 - Report Folders

Report Folders are displayed as tabs, and are a grouping of related reports.

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LOYOLA UNIVERSITY CHICAGO

Logoff | Tree | Tools | Recent | Favorites | Views | Utilities | Help

■ Locus ■ Loyola Directory ■ Loyola Pam Page ■ ResNet

Actual vs. Budget Reports Detail Reports Grant Reports

Actual vs. Budget Reports Output

- Actual vs. Budget Reports
 - Account Unit Summaries by Level
 - AU Balances by Department
 - AU Summary and YTD Detail
 - Available Gift Balances

Done webreports.luc.edu

Clicking on a tab will display the available reports.

A list of available reports for the selected report folder.

7 – How to Run a Report

Reports can be run (a) immediately, or in a (b) deferred status.

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 - Available Gift Balances
 - Run
 - Run Deferred
 - Schedule
 - Add to Favorites
 - Properties

To run a report, click on the report name and select 'Run'. You will be prompted to enter desired parameters.

javascript:void(0); webreports.luc.edu

7a – ‘How to Run a Report Immediately’

Selecting ‘Run Report’ will run the report immediately. *Only 1 report can be run at a time.*

WebFOCUS Business Intelligence Dashboard - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_INIT_VIEW&WORP_MPV

WebFOCUS Business Intelligence ...

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Loyola University Chicago

Available Gift Balances

Select a level. 1 - 10 - PRESIDENT

Select Fiscal Year. 2008

Select Period. 01

Select Output Type. PDF

Defer Run Report Clear Form

1. Select parameters.
2. Select Output Type 'PDF'.
3. Click 'Run Report'.

Done webreports.luc.edu

Output Type 'PDF'

WebFOCUS Business Intelligence Dashboard - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_INIT_VIEW&WORP_MPV

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Loyola University Chicago
Available Gift Balances
For Level 4 - 2722
Through 07/31/2007

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AU	AU Description	Beg Balance/ Transfers	Revenue	Expenses	Available
Lakeside Campus					
2722	TAX CLINIC				
210330	TAX CLINIC	(3,000)	(100)	0	(3,100)
	Total 2722	(3,000)	(100)	0	(3,100)
	Total Lakeside Campus	(3,000)	(100)	0	(3,100)
	TOTAL	(3,000)	(100)	0	(3,100)

1 of 1

webreports.luc.edu

Done

Click to save report onto your hard drive.

Click to maximize report in a new window.

Output Type 'Excel'

WebFOCUS Business Intelligence Dashboard - Windows Internet Explorer

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_INIT_VIEW&WORP_MPV=af_gbv&

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Actual vs. Budget Reports | Detail Reports | Grant Reports | Capital Reports

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- Account Unit Summaries by Level
- AU Balances by Department
- AU Summary (Individual AU)
- AU Summary and Detail
- Available Gift Balances

Loyola University Chicago

Available Gift Balances

Select a level. 3 - 113 - CHEMISTRY

Select Fiscal Year. 2008

Select Period. 06

Select Output Type. Excel

Defer Run Report Clear Form

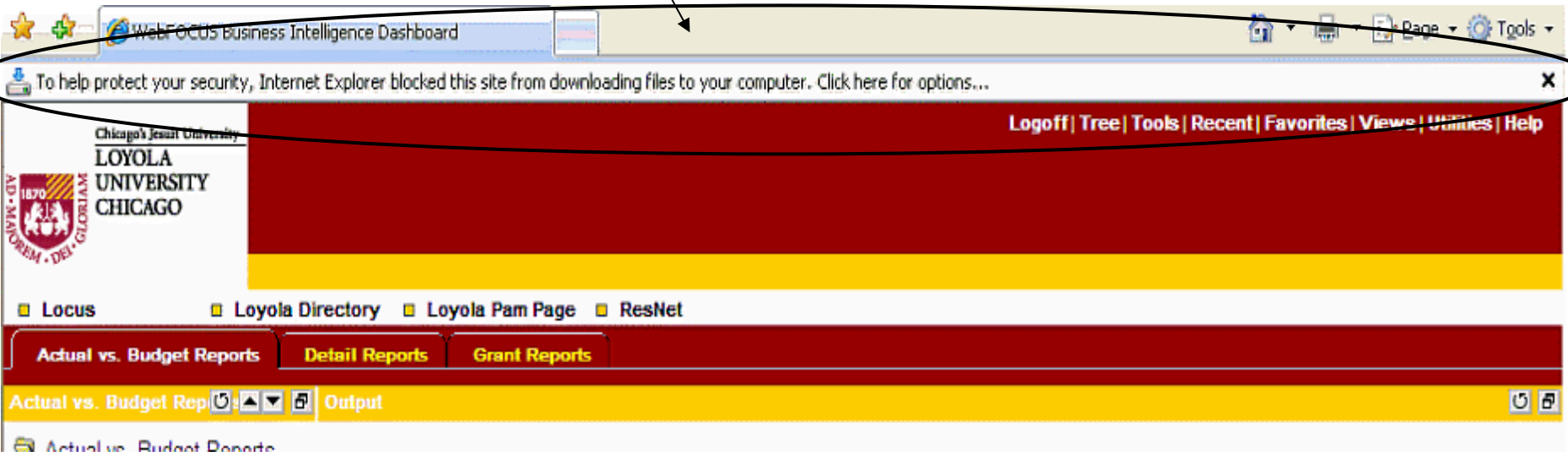
1. Select Parameters.

2. Select Output Type 'Excel'.

3. Click 'Run report'.

Internet 100%

If you encounter this error message after running a report with an Output Type as 'Excel', please refer to Internet Explorer Security Settings on page 2 .



The report will open up in the current browser window.

WebFOCUS Business Intelligence Dashboard - Windows Internet Explorer

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_INIT_VIEW&WORP_MPV=af_gbv&

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Click to Maximize.

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Actual vs. Budget Reports **Detail Reports** **Grant Reports** **Capital Reports**

Actual vs. Budget Reports **Output**

C20

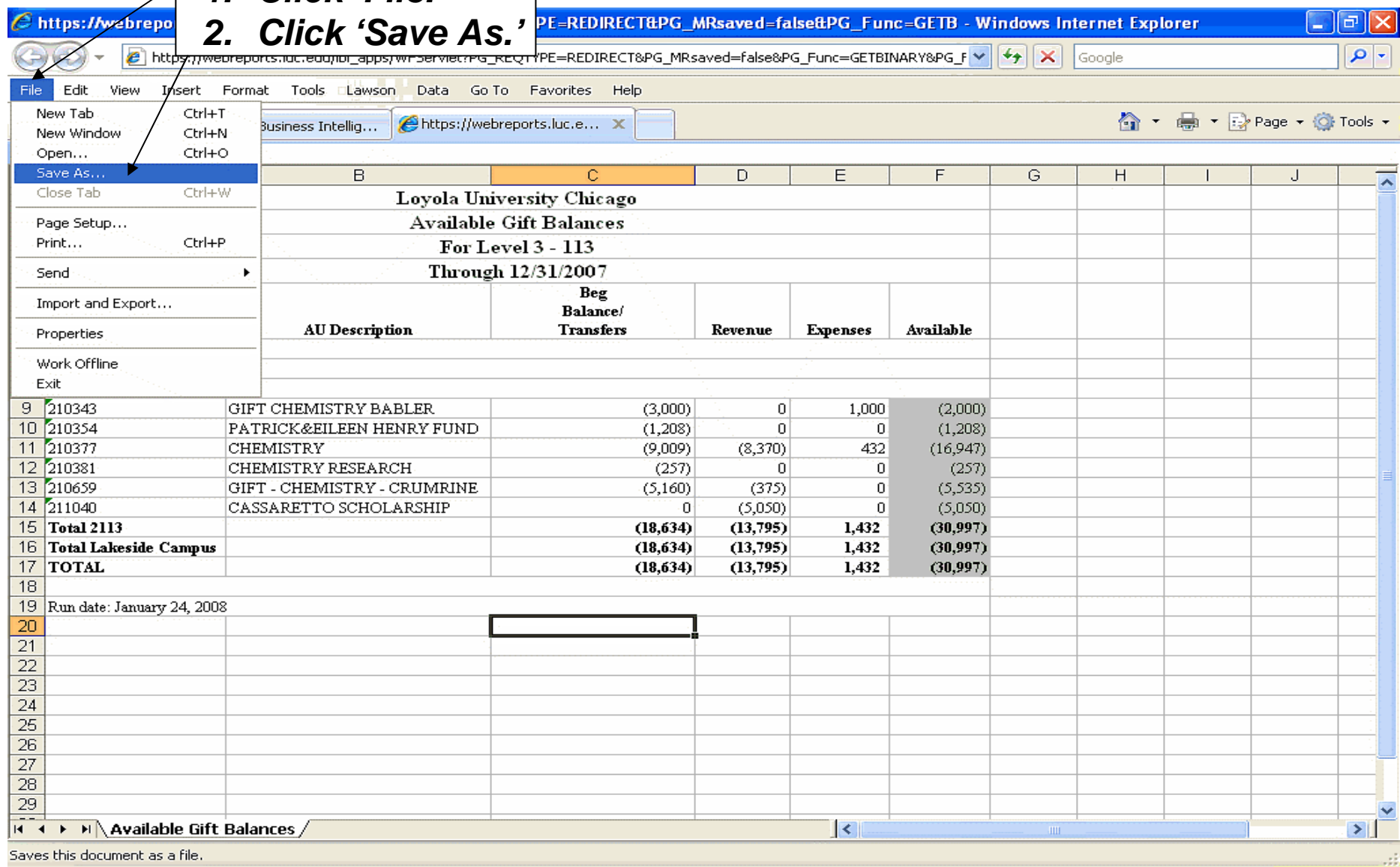
	A	B	C	D	E	F	G
1	Loyola University Chicago						
2	Available Gift Balances						
3	For Level 3 - 113						
4	Through 12/31/2007						
5	AU	AU Description	Beg Balance/ Transfers	Revenue	Expenses	Available	
6	Lakeside Campus						
7							
8	2113 - CHEMISTRY						
9	210343	GIFT CHEMISTRY BABLER	(3,000)	0	1,000	(2,000)	
10	210354	PATRICK&EILEEN HENRY FUND	(1,208)	0	0	(1,208)	
11	210377	CHEMISTRY	(9,009)	(8,370)	432	(16,947)	
12	210381	CHEMISTRY RESEARCH	(257)	0	0	(257)	
13	210659	GIFT - CHEMISTRY - CRUMRINE	(5,160)	(375)	0	(5,535)	
14	211040	CASSARETTO SCHOLARSHIP	0	(5,050)	0	(5,050)	
15	Total 2113		(18,634)	(13,795)	1,432	(30,997)	
16	Total Lakeside Campus		(18,634)	(13,795)	1,432	(30,997)	
17	TOTAL		(18,634)	(13,795)	1,432	(30,997)	
18							
19	Run date: January 24, 2008						
20							

Available Gift Balances

Internet 100%

Due to the report opening in the current browser window, there is limited Excel functionality such as sorting and filtering data. For full functionality, the file will need to be saved first as an Excel file then opened in Microsoft Excel:

1. Click 'File.'
2. Click 'Save As.'



The screenshot shows a web browser window displaying an Excel report. The browser's address bar shows a URL from 'webreports.luc.edu'. The report title is 'Loyola University Chicago Available Gift Balances For Level 3 - 113 Through 12/31/2007'. The 'File' menu is open, with 'Save As...' selected. The report table has the following data:

	AU Description	Beg Balance/ Transfers	Revenue	Expenses	Available
9	210343 GIFT CHEMISTRY BABLER	(3,000)	0	1,000	(2,000)
10	210354 PATRICK&EILEEN HENRY FUND	(1,208)	0	0	(1,208)
11	210377 CHEMISTRY	(9,009)	(8,370)	432	(16,947)
12	210381 CHEMISTRY RESEARCH	(257)	0	0	(257)
13	210659 GIFT - CHEMISTRY - CRUMRINE	(5,160)	(375)	0	(5,535)
14	211040 CASSARETTO SCHOLARSHIP	0	(5,050)	0	(5,050)
15	Total 2113	(18,634)	(13,795)	1,432	(30,997)
16	Total Lakeside Campus	(18,634)	(13,795)	1,432	(30,997)
17	TOTAL	(18,634)	(13,795)	1,432	(30,997)
18					
19	Run date: January 24, 2008				
20					
21					
22					
23					
24					
25					
26					
27					
28					
29					

The status bar at the bottom of the browser window reads: 'Saves this document as a file.'

Save As



Save in: Desktop



- Interface Reconciliation
- ControllersOf...
- Jeff
- Desktop**
- My Recent Documents
- My Documents
- My Computer
- My Network Places
- Gomez

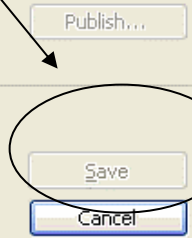
- My Computer
- My Documents
- My Network Places
- Misc

3. After naming the file and selecting a location on your computer to save it to, change the File Type to 'Microsoft Office Excel Workbook (*.xls)'.

4. Click 'Save'.

Save: Entire Workbook Selection: Sheet

- Microsoft Office Excel Workbook (*.xls)
 - XML Spreadsheet (*.xml)
 - XML Data (*.xml)
 - Single File Web Page (*.mht; *.mhtml)
 - Web Page (*.htm; *.html)
 - Template (*.xlt)
- Page title: _____
File name: _____
Save as type: Web Page (*.htm; *.html)



7b – Running a report in Deferred Status

Deferred reports run in the background. This allows you to submit multiple reports without having to wait for each report to finish before submitting another. **Reports run in a deferred status will be saved for 29 days.**

WebFOCUS Business Intelligence Dashboard - Windows Internet Explorer

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_INIT_VIEW&WORP_MPV=af_gbv&

WebFOCUS Business Intelligence Dashboard

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 - AU Balances by Department
 - AU Summary (Individual AU)
 - AU Summary and Detail
 - Available Gift Balances
 - Run
 - Run Deferred
 - Schedule
 - Add to Favorites
 - Properties

Click report name then select 'Run'.

javascript:void(0); Internet 100%

WebFOCUS Business Intelligence Dashboard - Windows Internet Explorer

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_INIT_VIEW&WORP_MPV=af_gbv&

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Loyola University Chicago

Available Gift Balances

Select a level. 3 - 113 - CHEMISTRY

Select Fiscal Year. 2008

Select Period. 06

Select Output Type. Excel

Defer Run Report Clear Form

1. Select parameters.

2. Select Output Type.

3. Click 'Defer'.

Internet 100%

WebFOCUS Business Intelligence Dashboard - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_INIT_VIEW&WORP_MPV

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- Available Gift Balances

WebFOCUS **Deferred Report Notification** **Information Builders.**

Wednesday, December 05, 2007 4:29:11 PM

available_gift_balances
has been successfully submitted for deferred execution.

You will receive a confirmation that your report was successfully submitted for deferred status.

Done webreports.luc.edu



Deferred Status
Domain Search

- Actual vs. Budget Reports
 - Account Unit Summaries by Level
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 - AU Summary and YTD Detail
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WebFOCUS Deferred Report Notification Information Builders.

Wednesday, December 05, 2007 4:29:11 PM

available_gift_balances
has been successfully submitted for deferred execution.

To track the status of a deferred report, click 'Utilities' and select 'Deferred Status'. A new browser window / tab will open with this information.

You can refresh the report status manually by clicking 'Refresh', or automatically, by entering a number of seconds and checking the 'Enable Refresh' box.

Deferred Report Status - Mozilla Firefox

File Edit View History Bookmarks Tools Help

https://webreports.luc.edu/libi_apps/Controller?WORP_REQUEST_TYPE=WORP_LAUNCH_CGI&IBIMR_ar

WebFOCUS Business Intelligence Das... Deferred Report Status

WebFOCUS[™] Deferred Report Status as of Wednesday, December 05, 2007 4:43:07 PM Information Builders.

Refresh Sort By Date Delete All Help

Refresh every seconds. (min. 5 seconds) Enable Refresh:

Completed				
Date/Time Submitted	Domains	Description	Expires In	Options
Wednesday, December 05, 2007 4:29:11 PM	Financial Reports	available_gift_balances	29 days	Delete View Save Parameters
Wednesday, December 05, 2007 4:18:04 PM	Financial Reports	available_gift_balances	29 days	Delete View Save Parameters
Wednesday, December 05, 2007 4:18:03 PM	Financial Reports	available_gift_balances	29 days	Delete View Save Parameters
Wednesday, December 05, 2007 4:17:56 PM	Financial Reports	available_gift_balances	29 days	Delete View Save Parameters

Queued				
Date/Time Submitted	Domains	Description		Options
Wednesday, December 05, 2007 4:43:04 PM	Financial Reports	AU Summary and YTD Detail		Delete

Reports will be divided based on it's status; 'Queued', 'Running', 'Completed', and 'Expired'.

Click 'View' to open the report. The report will open in a new browser window / tab.

8 - How to Add a Report as a Favorite

Reports can be added to a 'Favorites' list for quick access.

WebFOCUS Business Intelligence Dashboard - Windows Internet Explorer

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_INIT_VIEW&WORP_MPV=af_gbv&

File Edit View Favorites Tools Help

WebFOCUS Business Intelligence Dashboard

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- AU Summary (Individual AU)
- AU Summary and Detail
- Available Gift Balances
 - Run
 - Run Deferred
 - Schedule
 - Add to Favorites**
 - Properties

1. To add a report to a favorites list, click on the report name and select 'Add to Favorites'.

Windows Internet Explorer

Added to Favorites

OK

2. Click 'OK'.

javascript:void(0); Trusted sites 100%

Viewing Favorites List

WebFOCUS Business Intelligence Dashboard - Windows Internet Explorer

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_INIT_VIEW&WORP_MPV=af_gbv&

File Edit View Favorites Tools Help

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Actual vs. Budget Reports Detail Reports Grant Reports Capital Reports

Actual vs. Budget Reports Output

Actual vs. Budget Reports

Account Balances for Selected Level

Account Unit Summary by

**1. Click 'Favorites'.
A new browser window/tab
will open.**

Favorite Reports -- WebFOCUS Business Intelligence Dashboard - Windows Internet Explorer

https://webreports.luc.edu/ibi_apps/Controller?WORP_REQUEST_TYPE=WORP_LIST&WORP_BLOCK_NAME=favorites

File Edit View Favorites Tools Help

WebFOCUS Business Intellig... Favorite Reports -- WebF... X

Available Gift Balances

Close Remove All Refresh

**Favorite reports will be listed here. To run a report,
click on the report name and select 'Run'.
You will be prompted to enter parameters.**

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The WebFOCUS Training Document can be found online at:

<http://www.luc.edu/finance/fsdoc.shtml>



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