



LOYOLA
UNIVERSITY
CHICAGO

Preparing people to lead extraordinary lives

WebFOCUS Reporting User Manual



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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 displaying the Loyola University Chicago website. The address bar shows the URL <http://www.luc.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 website content includes navigation links (Home, A-Z Index, Contact Us, Directories, LOCUS), a search bar, and a banner with images of students and a camera. Below the banner are links for 'CURRENT STUDENTS', 'ALUMNI', 'PROSPECTIVE STUDENTS', and 'FACULTY AND STAFF'. The footer contains six columns of links: 'About Loyola', 'Academics', 'Admission', 'Campus Life', 'Resources', and 'News and Events'.

1. Click 'Tools'.

2. Click 'Internet Options'.

APPLY NOW | REQUEST INFORMATION

CURRENT STUDENTS | ALUMNI | PROSPECTIVE STUDENTS | FACULTY AND STAFF

About Loyola	Academics	Admission	Campus Life	Resources	News and Events
Give to Loyola	Calendars	Continuing Ed	Athletics	Human Resources	Register for Loyola Alerts
Historic Timeline	Departments	Executive Ed	Internships	Information Commons	Spring Semester Update
Loyola Facts	Programs	Graduate	Museum	Jobs at Loyola	Presidential Primary Experts Available for Comment
Mission & Ministry	Research	Professional	Student Affairs	Libraries	

Enables you to change settings. 100%

3. Click 'Security'.

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

4. Click 'Trusted Sites'.

5. Click 'Sites'.



APPLY NOW REQUEST INFORMATION



PROSPECTIVE STUDENTS FACULTY AND STAFF

News and Events
Register for Loyola Alerts
Spring Semester Update
Presidential Primary Experts Available for Comment

About Loyola
Give to Loyola
Historic Timeline
Loyola Facts
Mission & Ministry

Academic
Calendars
Departments
Programs
Research
Executive Ed
Graduate
Professional
Internships
Museum
Student Affairs
Information Commons
Jobs at Loyola
Libraries



LOYOLA UNIVERSITY CHICAGO

Preparing people to lead extraordinary lives



About Loyola

- Give to Loyola
- Historic Timeline
- Loyola Facts
- Mission & Ministry

Academic

- Calendars
- Departments
- Programs
- Research

- Executive Ed
- Graduate
- Professional

- Internships
- Museum
- Student Affairs

- Information Commons
- Jobs at Loyola
- Libraries

and Events

- Register for Loyola Alerts
- Spring Semester Update
- Presidential Primary Experts Available for Comment

Internet Options

General Security Privacy Content Connections Programs Advanced

Trusted sites

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

Add this website to the zone:

Websites:

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

Buttons: Add, Remove, Close

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

7. Click 'Close'.

Loyola University Chicago - Windows Internet Explorer

http://www.luc.edu/

File Edit View Favorites Tools Help

Loyola University Chicago-

A-Z Index | Contact Us | Directories | LOCUS

SEARCH LINKS

LOYOLA UNIVERSITY CHICAGO
1870 • MAI • DEI • GLORIAM
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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.

8. Click 'Custom level'.

Custom level... Default level

Reset all zones to default level

OK Cancel Apply

APPLY NOW | REQUEST INFORMATION

RESPECTIVE STUDENTS | FACULTY AND STAFF

News and Events
Register for Loyola Alerts
Spring Semester Update
Presidential Primary Experts Available for Comment

About Loyola
Give to Loyola
Historic Timeline
Loyola Facts
Mission & Ministry

Academic
Calendars
Departments
Programs
Research

Executive Ed
Graduate
Professional

Internships
Museum
Student Affairs

Information Commons
Jobs at Loyola
Libraries

Internet 100%



WEBREPORTS

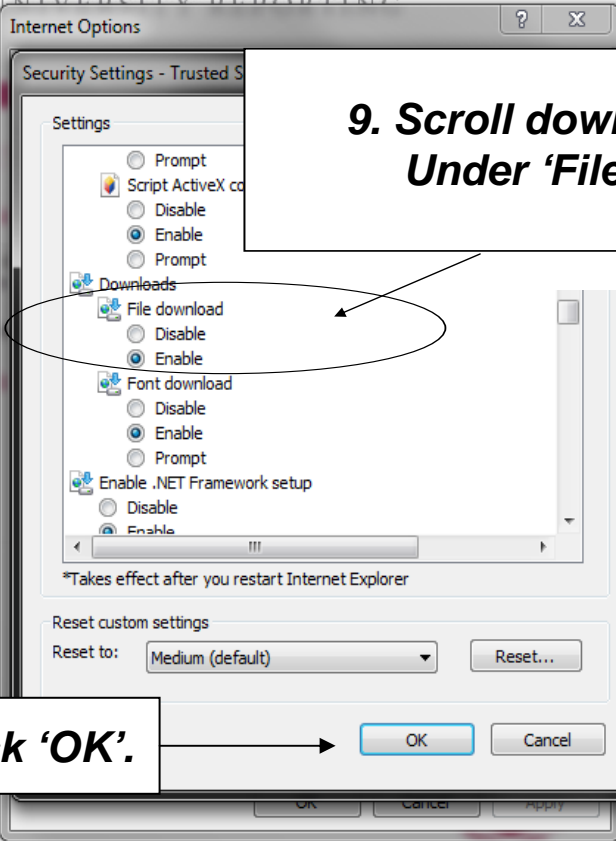
WELCOME

[Dashboard](#)

* To simplify
"Views" link i

RDS data ge

[Report Librar](#)



9. Scroll down to the 'Downloads' section. Under 'File download', click 'Enable'.

10. Click 'OK'.

Managed Reporting Login

Related Links

[WebFOCUS Documentation](#)

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WEBREPORTS

UNIVERSITY REPORTING

SEARCH

LINKS

WELCOME

[Dashboard](#)

* To simplify "Views" link

RDS data get

[Report Library](#)

then click on the
ve access.

Resources

Managed Reporting Logon

Related Links

WebFOCUS Documentation

Internet Options

Security Settings - Trusted Sites Zone

Settings

- Script ActiveX controls marked safe for scripting*
 - Disable
 - Enable
 - Prompt
- Downloads
 - File download
 - Disable
 - Enable
 - Font download
 - Disable
 - Enable
 - Prompt
 - Enable .NET Framework...
 - Disable
 - Enable
 - Miscellaneous

Internet Explorer

Reset...

OK Cancel

Warning!

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

Yes No

11. Click 'Yes'.

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Right & Disclaimer 2007



WEBREPORTS

SEARCH

LINKS

WELCOME

[Dashboard](#)

* To simplify "Views" link

RDS data get

[Report Library](#)

HOME PAGE

and then click on the
have access.

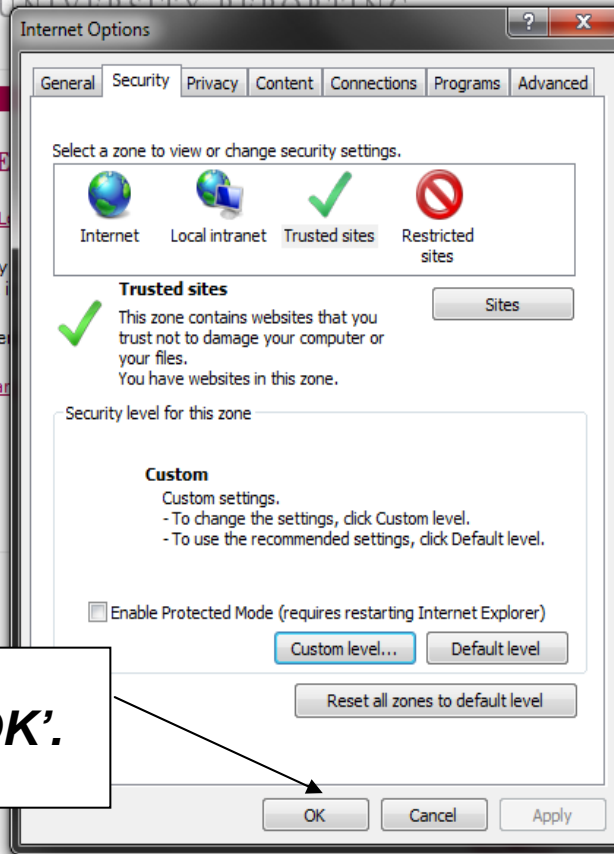
Resources

[Managed Reporting Logon](#)

Related Links

[WebFOCUS Documentation](#)

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12. Click 'OK'.

3 - Accessing the WebFOCUS Web Page

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

LOYOLA UNIVERSITY CHICAGO
AD • MAIOREM • DEI • GLORIAM

WEBREPORTS
UNIVERSITY REPORTING

Home | A-Z Index | Contact Us | Directories | LOCUS

SEARCH LINKS

WELCOME TO LOYOLA UNIVERSITY'S WEBFOCUS LAUNCH PAGE

[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.

RDS data generated on: April 17 2013 1:07:01am

[Report Library](#) (For Report Viewers)

Resources

Managed Reporting Logon

Related Links

WebFOCUS Documentation

CHICAGO | ROME | BEIJING

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Click on 'Dashboard Logon Page'.

4 - Login Screen

Managed Reporting sign on: Enable Accessibility

User ID:

Password:

Logon 

Reset 

***Log in using your network ID
and password.***

•Click 'Logon'.

5 - 'Views'

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



WEBREPORTS
UNIVERSITY REPORTING

[Logoff](#) | [Accessibility On](#) | [Tree](#) | [Tools](#) | [Recent](#) | [Favorites](#) | [Views](#) | [Personalize](#) | [Utilities](#) | [Help](#)

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

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

Available Views

- Access Check
- Budget Planning
- Capitals
- Financial Reports
- Health Sciences Division
- SPA Grant Reports
- SPA ID Lookup
- University Payroll Reports

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

6 - Report Folders

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



A screenshot of a web application interface. At the top, there is a dark red navigation bar with several tabs: 'Account Unit Reports', 'Department Reports', 'Detail Reports', 'Grant Reports', 'Capital Reports', and 'RSE RFC & Program Dev Reports'. The 'Account Unit Reports' tab is selected and highlighted in yellow. Below the navigation bar, there is a yellow header area with the text 'Account Unit Reports' and 'Output'. Underneath, a list of report folders is displayed, each with a document icon and a red text label: '198xxx - Agency Account Balances', '2xxxxx - Gift Balances', '3xxxxx - Med R&E Net Assets', '4xxxxx - Endowment Balances', '67xxxx - Profit Sharing/Carry Forward', 'AU Summary (Individual AU)', and 'AU Summary and Detail'. An arrow points from the 'Account Unit Reports' tab to a text box on the right, and another arrow points from the 'AU Summary and Detail' folder to a text box at the bottom.

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.



FINANCIAL SERVICES

Account Unit Reports | Department Reports | Detail Reports | Grant Reports | Capital Reports | RSE RFC & Program Dev Reports

Account Unit Reports | Output

Account Unit Reports

- 198xxx - Agency Account Balances
- 2xxxxx - Gift Balances
- 3xxxxx - Med R&E Net Assets
- 4xxxxx - Endowment Balances
- 67xxxx - Profit Sharing/Carry Forward
- AU Summary (Individual AU)
- AU Summary and Detail

Loyola University Chicago

Account Unit Summary and Detail

Select Account Unit.	100001 -OFFICE OF THE PRESIDENT
Select Fiscal Year.	2013
Select Period.	12 - June
Select Accounts.	Expenses (including payroll)
Select Budget.	Budget 1 - Revised Budget
Transaction Detail.	Year to Date
Payroll Detail.	Include
Select Output Type.	PDF

To run a report, left-mouse click on the report name. You will be prompted to enter desired parameters.

7a – ‘How to Run a Report Immediately’

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



FINANCIAL SERVICES

Account Unit Reports | Department Reports | Detail Reports | Grant Reports | Capital Reports | RSE RFC & Program Dev Reports

Account Unit Reports Output

Account Unit Reports

- 198xxx - Agency Account Balances
- 2xxxxx - Gift Balances
- 3xxxxx - Med R&E Net Assets
- 4xxxxx - Endowment Balances
- 67xxxx - Profit Sharing/Carry Forward
- AU Summary (Individual AU)
- AU Summary and Detail

Loyola University Chicago

Account Unit Summary and Detail

Select Account Unit.	100001 -OFFICE OF THE PRESIDENT
Select Fiscal Year.	2013
Select Period.	12 - June
Select Accounts.	Expenses (including payroll)
Select Budget.	Budget 1 - Revised Budget
Transaction Detail.	Year to Date
Payroll Detail.	Include
Select Output Type.	PDF

1. Select parameters.

2. Click ‘Run Report’.

Output Type 'PDF'



FINANCIAL SERVICES

Click to maximize report in a new window.

[Logoff](#) | [Accessibility On](#) | [Tree](#) | [Tools](#) | [Views](#) | [Utilities](#) | [Help](#)

Account Unit Reports | Department Reports | Detail Reports | Grant Reports | Capital Reports | RSE RFC & Program Dev Reports

Account Unit Reports **Output**

- 198xxx - Agency Account Balances
- 2xxxxx - Gift Balances
- 3xxxxx - Med R&E Net Assets
- 4xxxxx - Endowment Balances
- 67xxxx - Profit Sharing/Carry Forward
- AU Summary (Individual AU)
- AU Summary and Detail

Page: 1 of 2 | 91%

Click to save report to your PC.

Click to maximize report in a new window.

Loyola University Chicago
Accounting Unit Summary
Revenue & Expenses
AU 100499 - LOYOLA MAGAZINE
As of 04/30/2013

	Revised Budget	Actual Month	Actual YTD	Commitments	Available	% Used
ACCOUNT SUMMARY						
100499 - LOYOLA MAGAZINE						
Expenses						
Direct Non-Salary Expense						
6200 PRINTING - INTERNAL	210,975.00	.00	114,241.97	0.00	96,733.03	54.15%
6202 PHOTOGRAPHY	16,000.00	.00	.00	0.00	16,000.00	.00%
6220 POSTAGE, SHIPPING, HANDLI	94,617.00	18,000.00	89,034.68	0.00	5,582.32	94.10%
6253 CONTRACTED OUTSOURCED SER.	19,440.00	.00	3,776.42	0.00	15,663.58	19.43%
Total Direct Non-Salary Expense	341,032.00	18,000.00	207,053.07	.00	133,978.93	60.71%
Total Expenses	341,032.00	18,000.00	207,053.07	.00	133,978.93	60.71%
TOTAL 100499	341,032.00	18,000.00	207,053.07	.00	133,978.93	60.71%

Output Type 'Excel'



Account Unit Reports

- 198xxx - Agency Account Balances
- 2xxxxx - Gift Balances
- 3xxxxx - Med R&E Net Assets
- 4xxxxx - Endowment Balances
- 67xxxx - Profit Sharing/Carry Forward
- AU Summary (Individual AU)
- AU Summary and Detail

Loyola University Chicago

Account Unit Summary and Detail

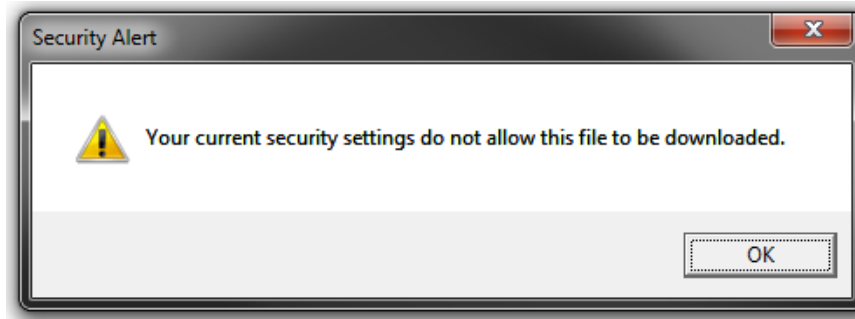
Select Account Unit.	<input type="text" value="100100 - BIOLOGY DEPARTMENT"/>
Select Fiscal Year.	<input type="text" value="2013"/>
Select Period.	<input type="text" value="10 - April"/>
Select Accounts.	<input type="text" value="Expenses (excluding payroll)"/>
Select Budget.	<input type="text" value="Budget 1 - Revised Budget"/>
Transaction Detail.	<input type="text" value="Year to Date"/>
Payroll Detail.	<input type="text" value="Exclude"/>
Select Output Type.	<input type="text" value="Excel"/>

1. Select parameters.

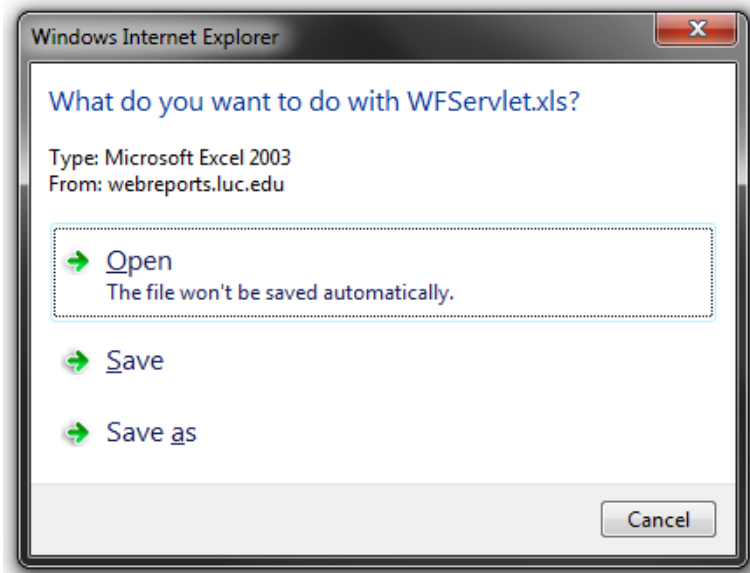
2. Select Output Type 'Excel'.

3. Click 'Run Report'.

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



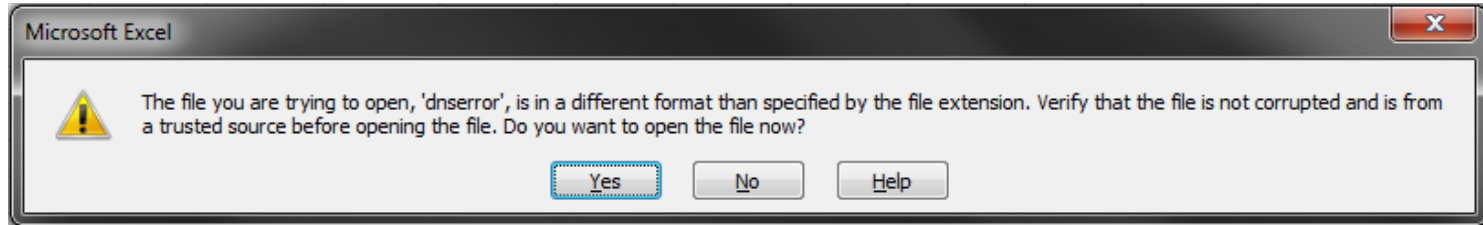
You will be prompted to Open, Save, or Save as.



Click 'Open' to open the file in Excel or 'Save'/'Save as' to save the file to your PC.

If you clicked 'Open', the file will open directly in Excel.

Click 'Yes' at the prompt.



WFServlet[1].xls - Microsoft Excel

File Home Insert Page Layout Formulas Data Review View Acrobat

F42 fx

	A	B	C	D	E	F	G	H	I
1	Loyola University Chicago								
2	Accounting Unit Summary								
3	Revenue & Expenses								
4	AU 100499 - LOYOLA MAGAZINE								
5	As of 04/30/2013								
6									
7									
8			Revised Budget	Actual Month	Actual YTD	Commitments	Available	% Used	
9	ACCOUNT SUMMARY								
10	100499 - LOYOLA MAGAZINE								
11									
12	Expenses								
13									
14	Direct Non-Salary Expense								
15		6200 PRINTING - INTERNAL	210,975.00	.00	114,241.97		96,733.03	54.15%	
16		6202 PHOTOGRAPHY	16,000.00	.00	.00		16,000.00	.00%	
17		6220 POSTAGE, SHIPPING, HANDLI	94,617.00	18,000.00	89,034.68		5,582.32	94.10%	
18		6253 CONTRACTED OUTSOURCED SER	19,440.00	.00	3,776.42		15,663.58	19.43%	
19	Total Direct Non-Salary Expense		341,032.00	18,000.00	207,053.07		133,978.93	60.71%	
20	Total Expenses		341,032.00	18,000.00	207,053.07		133,978.93	60.71%	

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.**



FINANCIAL
SERVICES

[Logoff](#) | [Accessibility On](#) | [Tree](#) | [Tools](#) | [Views](#) | [Utilities](#) | [Help](#)

Account Unit Reports Department Reports Detail Reports Grant Reports Capital Reports RSE RFC & Program Dev Reports

Account Unit Reports Output

Account Unit Reports

- 198xxx - Agency Account Balances
- 2xxxxx - Gift Balances
- 3xxxxx - Med R&E Net Assets
- 4xxxxx - Endowment Balances
- 67xxxx - Profit Sharing/Carry Forward
- AU Summary (Individual AU)
- AU Summary and Detail**

Loyola University Chicago
Account Unit Summary and Detail

Select Account Unit. 100001 -OFFICE OF THE PRESIDENT

Select Fiscal Year. 2013

Select Period. 12 - June

Select Accounts. Expenses (including payroll)

Select Budget. Budget 1 - Revised Budget

Transaction Detail. Year to Date

Payroll Detail. Include

Select Output Type. PDF

Defer Run Report Clear Form

Left-mouse click report name.



Account Unit Reports

- 198xxx - Agency Account Balances
- 2xxxxx - Gift Balances
- 3xxxxx - Med R&E Net Assets
- 4xxxxx - Endowment Balances
- 67xxxx - Profit Sharing/Carry Forward
- AU Summary (Individual AU)
- AU Summary and Detail

Loyola University Chicago

Account Unit Summary and Detail

Select Account Unit.

Select Fiscal Year.

Select Period.

Select Accounts.

Select Budget.

Transaction Detail.

Payroll Detail.

Select Output Type.

1. Select parameters.

2. Click 'Defer'.



Account Unit Reports | Department Reports | Detail Reports | Grant Reports | Capital Reports | RSE RFC & Program Dev Reports

Account Unit Reports Output

Account Unit Reports

- 198xxx - Agency Account Balances
- 2xxxxx - Gift Balances
- 3xxxxx - Med R&E Net Assets
- 4xxxxx - Endowment Balances
- 67xxxx - Profit Sharing/Carry Forward
- AU Summary (Individual AU)
- AU Summary and Detail

WebFOCUS

Deferred Report Notification

Information Builders

Wednesday, April 17, 2013 4:09:55 PM
summary and detail
has been successfully submitted for deferred execution.



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



Deferred Status

Domain Search

Stop Requests

Account Unit Reports

Department Reports

Detail Reports

Grant Reports

Capital Reports

RSE RFC & Program Dev Reports

Account Unit Reports



Output



Account Unit Reports

WebFOCUS

Deferred Report Notification

Information Builders

198xxx - Agency Account Balances

2xxxxx - Gift Balances

3xxxxx - Med R&E Net Assets

4xxxxx - Endowment Balances

67xxxx - Profit Sharing/Carry Forward

AU Summary (Individual AU)

AU Summary and Detail

Wednesday, April 17, 2013 4:09:55 PM
summary and detail
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_ac

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.

Contacts

Financial Systems – <http://www.luc.edu/finance>
financialsystems@luc.edu

Rebecca Gomez – Director, Financial Systems & Payroll
x5-8725
rgomez1@luc.edu

Tracy Snowberger – Senior Financial Systems Analyst
x5-8711
tsnowbe@luc.edu

*The WebFocus User Manual can be found here: <http://www.luc.edu/finance/fsdoc.shtml>