

WEBFOCUS BI PORTAL NAVIGATION

FINANCIAL SERVICES



WEBFOCUS NAVIGATION

Welcome to the WebFOCUS Business Intelligence (BI) Portal

WebFOCUS is Loyola's primary reporting tool for academic and non-academic data.

Data Refresh Timing

Unless otherwise noted, the data in WebFOCUS is refreshed from the previous day.

Personal/Sensitive Information

The reports in WebFOCUS are the property of Loyola University Chicago and may not be exported outside the institution without express written consent. All student and employee information is personal and confidential and to be used only for official University business. To learn more about Personally Identifiable Information policies go to luc.edu/uiso/compliance/pii.shtml.

Logging in

To Log into WebFOCUS, go to Bl.luc.edu, enter your universal ID and Password and click *Access BI*.

Supported browsers:



Microsoft Edge



Chrome




Firefox*

*note: some fields and calendar drop-downs may be misaligned on the screen in Firefox.



Portals

In WebFOCUS 8, instead of having to click through a series of dashboard views, many reports have been consolidated.

After logging in, you will be presented with a welcome page. Where you can select a portal to enter.  Finance

To access the Finance portal, double-click the portal title or the button.




Finding a Report

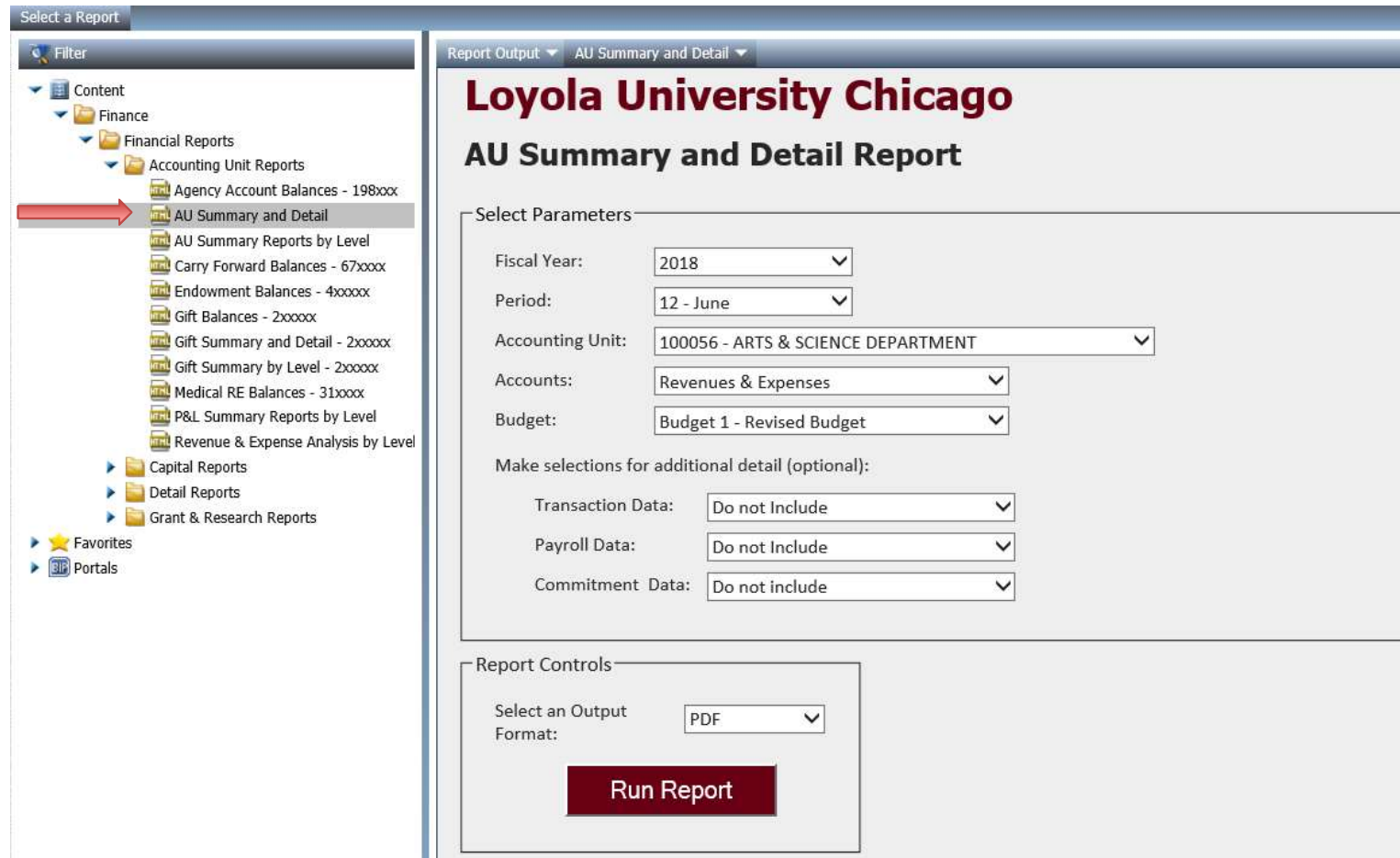
Depending on your security access, you will see different content folders.

Navigation is similar to any file browsing. Simply double click a folder to expand it.



Running a Report

To run a report, Double-Click the icon  or report name, select your parameters and then click the Run Report button.



Select a Report

Filter

- Content
 - Finance
 - Financial Reports
 - Accounting Unit Reports
 - Agency Account Balances - 198xxx
 - AU Summary and Detail**
 - AU Summary Reports by Level
 - Carry Forward Balances - 67xxxx
 - Endowment Balances - 4xxxxx
 - Gift Balances - 2xxxxx
 - Gift Summary and Detail - 2xxxxx
 - Gift Summary by Level - 2xxxxx
 - Medical RE Balances - 31xxxx
 - P&L Summary Reports by Level
 - Revenue & Expense Analysis by Level
 - Capital Reports
 - Detail Reports
 - Grant & Research Reports

- Favorites
- Portals

Report Output: AU Summary and Detail

Loyola University Chicago

AU Summary and Detail Report

Select Parameters:

Fiscal Year:

Period:

Accounting Unit:

Accounts:

Budget:

Make selections for additional detail (optional):

Transaction Data:

Payroll Data:

Commitment Data:

Report Controls:

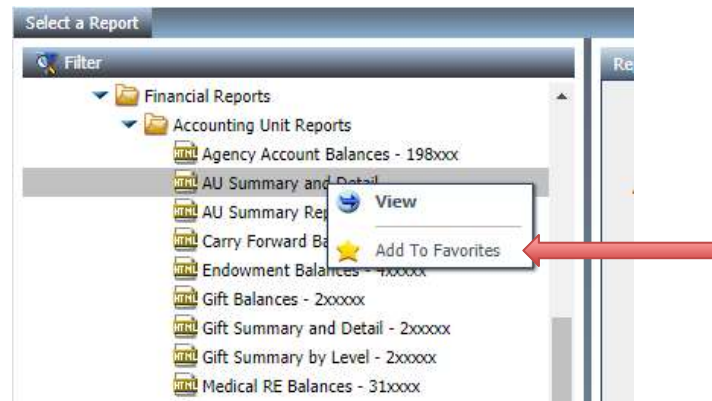
Select an Output Format:

Run Report

Tip #1

Favorites

If you find yourself running a report frequently, you can right-click on any report and select “Add to Favorites”




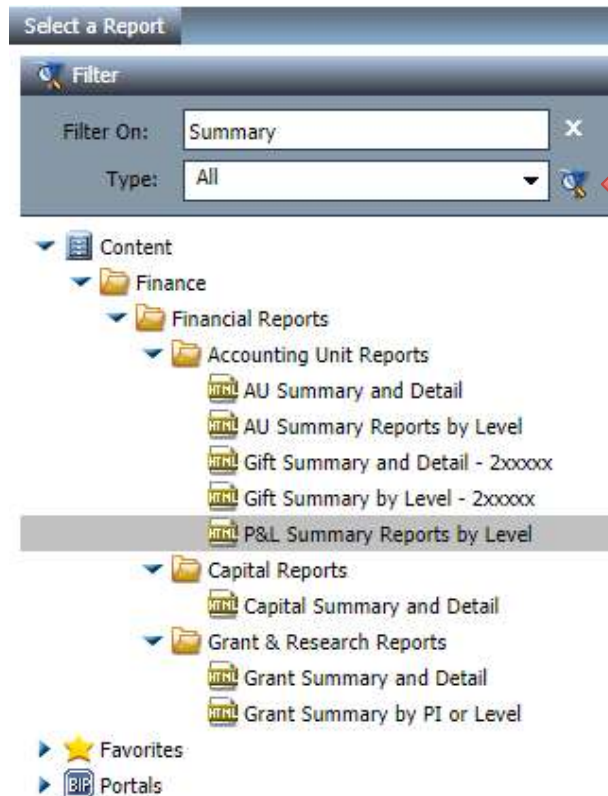
You can then find the favorite you added in the *Favorites* section at the bottom of the Content folders.



Tip #2

Filtering

If you know a word or part of a word from a report that you wish to run, you can click on the filter icon  at the top of the Content folders list and type it in the *Filter* section.



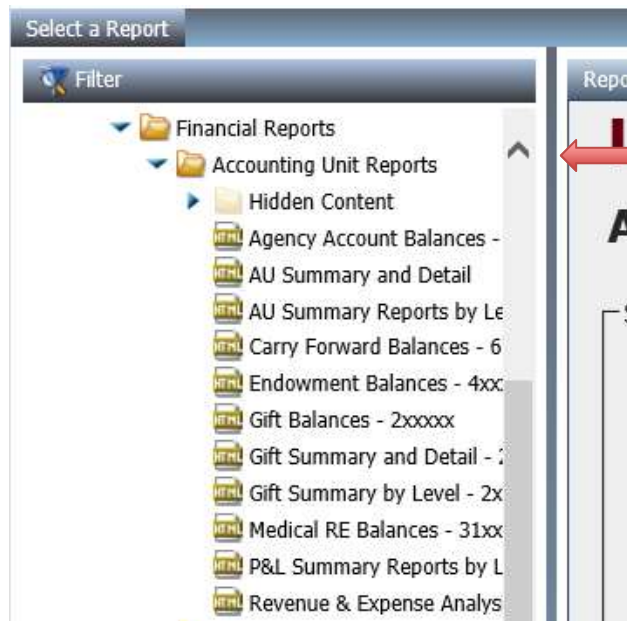
Click the filter icon and expand the folders to display a list of reports containing the search word.

To cancel the filter and display all reports, click on the filter icon again.

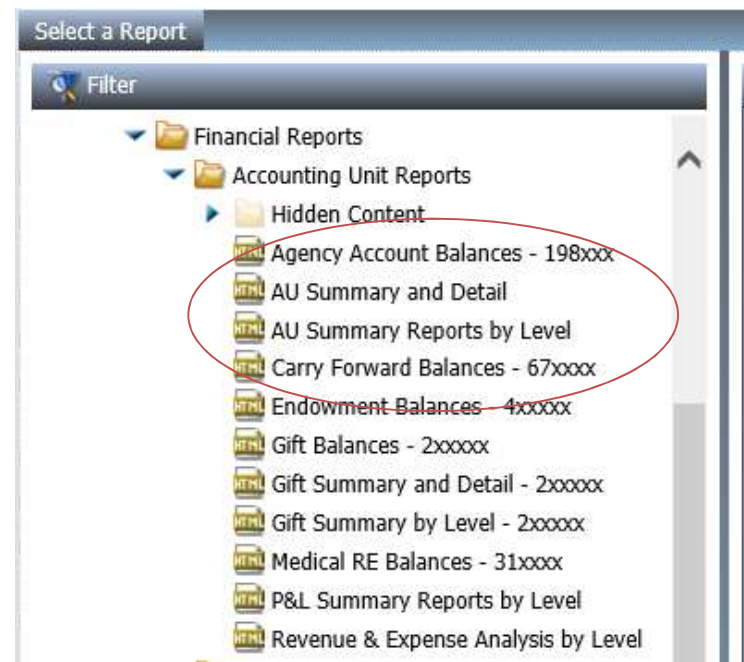
Tip #3

Expanding the Content Section

To expand the Content section to show the full report names, click on the blue line to show the arrow \longleftrightarrow and drag the blue line.



Click the blue line to expand the column width



Tip #4

Using the Report Tabs

Reports that have been opened will be listed in the blue bar above the report container. To refresh the parameter selections or delete the tab, click the drop down box to choose an option.



The screenshot shows the top navigation bar with three tabs: 'Report Output', 'SF Line Detail by AU and Account', and 'AU Summary and Detail'. The 'AU Summary and Detail' tab is active and has a dropdown menu open with 'Refresh' and 'Delete' options. Below the tabs is the 'Loyola University Chicago' logo and the title 'AU Summary and Detail Report'. Underneath is a 'Select Parameters' section with five dropdown menus: 'Fiscal Year' (2018), 'Period' (12 - June), 'Accounting Unit' (100001 - OFFICE OF THE PRESIDENT), 'Accounts' (Revenues & Expenses), and 'Budget' (Budget 1 - Revised Budget).

Questions

For new or revised WebFocus access: submit a “Lawson/Webfocus Access Request Form” which can be found under the Lawson Forms section here

www.luc.edu/finance/forms.shtml

Financial Reports List: can be found under WebFocus Documentation here

www.luc.edu/finance/fsdoc.shtml

For Finance report questions please contact:

FinancialSystems@luc.edu or

Tracy Snowberger - tsnowbe@luc.edu



Preparing people to lead extraordinary lives