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LBI Dashboard and Reports

What is on the LBI Dashboard?

All users with access to Lawson will be provided with the Daily Admin tab on the LBI Dashboard. The Daily Admin tab has useful reports, forms and links. All reports, lists and forms contained on the dashboard will be preceded by an identification number as well as linked quick reference guides on report content. Content is arranged on the dashboard within the following categories:

- Financial Reports
- Employee Information
- Forms and Look-up
- Website Links
- Requisitions and Purchase Orders
- Procurement Cards
- Payment Services

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What reports will help me with Lawson account information?

- **GL Budget to Actual** - Report lists all accounts with reported budget as well as actual expense for GL accounts, and variance in actual expenses to available budget.
- **AC Budget to Actual** - Report lists all AC (Activity) accounts for Grants, Bond or Capital projects, and associated GL accounts with reported budget as well as actual expense. Report also shows variance in actual expenses to available budget in the reported Activity.
- **Active Accounting Unit by BR** - Will list all active GL Accounts for selected BR (Budgetary Responsibility)

Important Requirement to note: Any Accounting Unit that begins with the digit 3 or higher must be used with an Activity and Account Category.

- **Active Activities by BR** - Will list all active Activities (Grants/Bond/Capital projects) with associated Fund and Accounting Unit for selected BR.
- **Commitment Report** provides the account code components, system/source documents, transaction date, vendor name, and outstanding commitment amount. The report can be used to facilitate reconciliation and analysis of GL Budget to Actual reports.

Transaction reference numbers are displayed in the “Source Doc” field as noted below:

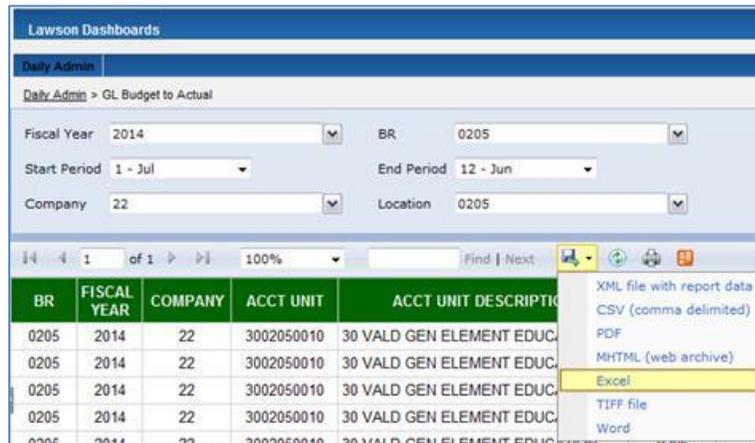
SYSTEM	SOURCE DOC
PO	1760790000
AP	NB1656

- The typical transactions in the “Source Doc” field include the following systems:
Requisitions (RQ)
Accounts Payable (AP)
Purchase Order (PO)
- The format of the field values are as follows:
RQ: Requisition #
PO: PO Number | PO Line | PO Code
AP: Invoice Number

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How do I save a Lawson report?

To save a report in the user’s chosen format, the pull down menu for the save icon  must be selected and the desired report format chosen.



Once the desired format is selected, the user will be presented with a prompt for a choice to either open the file in the new format or save it. When saving the file, select a file destination and rename the file with a naming convention that best describes the report for your future reference.

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How do I request a new report related to Lawson data?

If the Lawson system does not have an existing form or report available to our end users, FSIS will work with the end user to create a new dashboard report (or tweak existing reports if possible). FSIS Management will have to sign off on the report before it is deployed.

1. Go to the Finance Reports Request page, located at:
<https://departments.dpsk12.org/hr/sysproc/reports/Pages/default.aspx>
2. Click on the “Finance Report Requests” link on the left side of the page.



Financial Services – Frequently Asked Questions

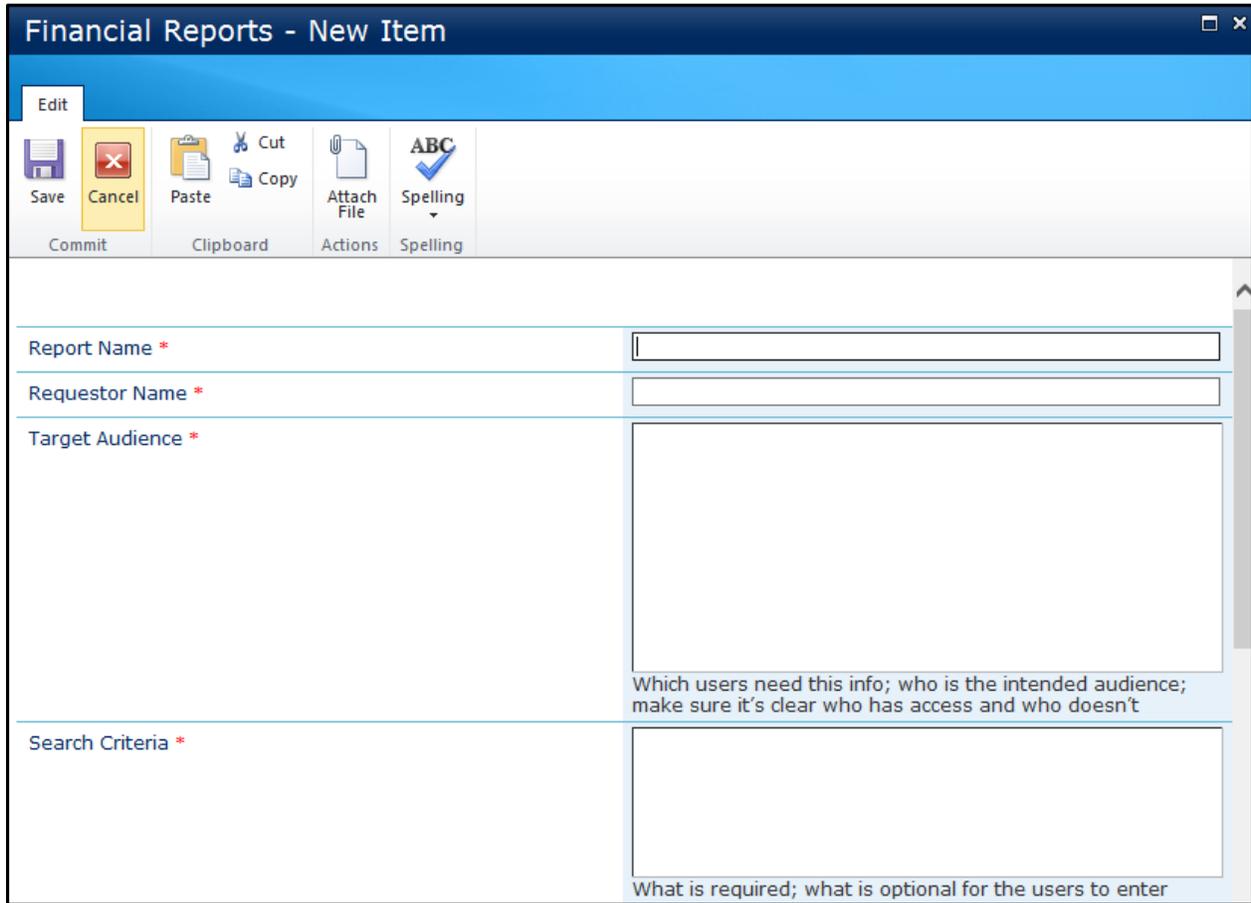
Menus
Lists
Libraries
Site Pages
HR Report Docs
Finance Report Requests
HRIS Report Requests
All Requests
Completed Requests
Finance Reports
SLT Update
Level1

3. Click on the “Add New Item” link.

Financial Reports > All Items

Menus	<input type="checkbox"/>		Report Name	Requestor Name	Target Audience	Search Criteria	Data Filter
Lists	There are no items to show in this view of the "Financial Reports" list. To add a new item, click "New".						
Libraries	+ Add new item						

4. Fill out all fields with an * in the “Financial Reports - New Item” pop up form. Please fill out the form to the best of your ability. This will be a first draft so that we can better understand your needs. Financial Services will review the form and contact you to discuss in further detail.



The screenshot shows a web application window titled "Financial Reports - New Item". At the top, there is a blue header bar with the word "Edit" on the left. Below the header is a toolbar with several icons: a floppy disk for "Save", a red 'X' for "Cancel", a clipboard for "Paste", a pair of scissors for "Cut", a document for "Copy", a paperclip for "Attach File", and a checkmark for "Spelling". Below the toolbar are four tabs: "Commit", "Clipboard", "Actions", and "Spelling". The main content area is a form with four sections, each with a label and a red asterisk indicating a required field:

- Report Name ***: A single-line text input field.
- Requestor Name ***: A single-line text input field.
- Target Audience ***: A large multi-line text area. Below the text area is a blue tooltip that reads: "Which users need this info; who is the intended audience; make sure it's clear who has access and who doesn't".
- Search Criteria ***: A large multi-line text area. Below the text area is a blue tooltip that reads: "What is required; what is optional for the users to enter".

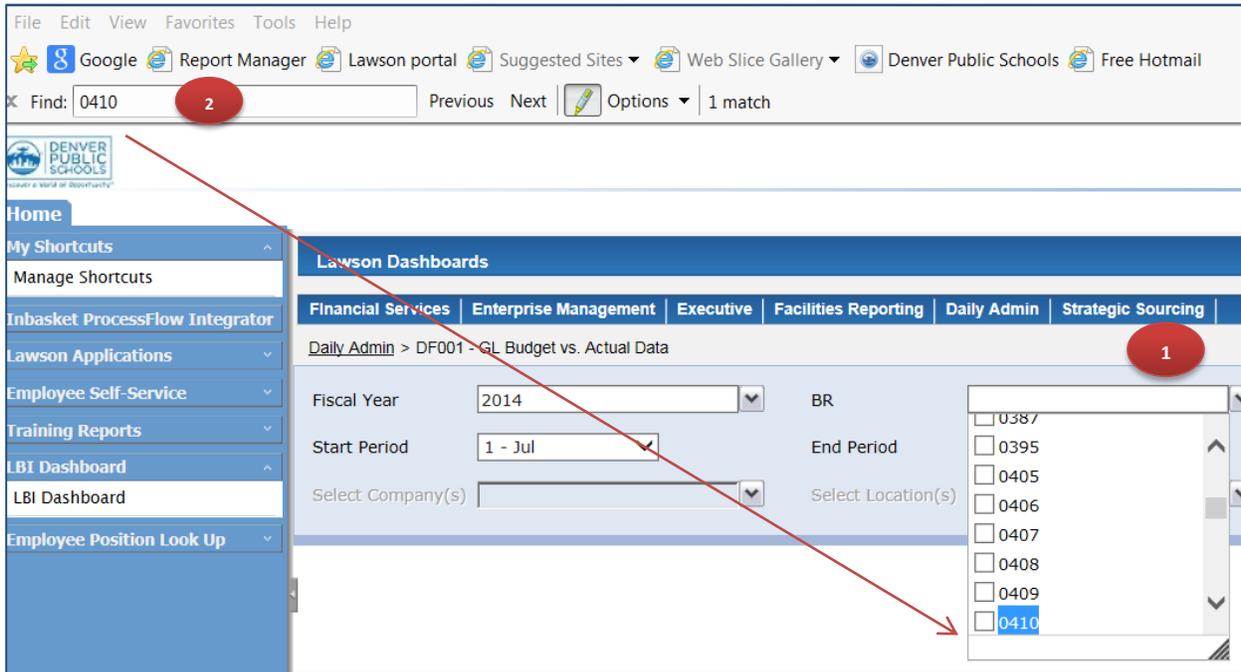
5. If the report is approved, we will work with the end user to get the report developed. It must go through a thorough testing process after development, and then FSIS management must sign off on the report before final deployment.

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Is there an easier way to find my selection criteria when creating a report?

When a long list of options exists for selection criteria a “find” function will help move to the desired criteria.

1. Open the pull-down menu for the selection field. (Make sure all boxes are not checked.)
2. Depress the **Control F** keys at the same time and a **Find** entry field will open at the top of the screen.
3. Enter the information you wish to find (example 0410) and the selection box scroll will move to the location of the information entered to find.
4. The option can then be checked as selection criteria.



The screenshot displays the Lawson Financial Services interface. At the top, a search bar contains the text "Find: 0410" with a red circle labeled "2" next to it. Below the search bar, a navigation menu includes "Financial Services", "Enterprise Management", "Executive", "Facilities Reporting", "Daily Admin", and "Strategic Sourcing". A red circle labeled "1" is positioned over the "Daily Admin" tab. The main content area shows a report titled "Daily Admin > DF001 - GL Budget vs. Actual Data". Below the title, there are fields for "Fiscal Year" (2014), "Start Period" (1 - Jul), "End Period", "Select Company(s)", and "Select Location(s)". A list of selection criteria is displayed on the right, with "0410" highlighted in blue. A red arrow points from the search bar to the highlighted "0410" entry.

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